<u>HOW DO I RUN A MEETING?</u>

07/12/2023

How do you prepare for your meeting?

1. *Create an agenda.*
   a. Send out an agenda BEFORE the meeting so everyone has an opportunity to add topics.
   b. If the meeting is reoccurring, make sure the previous week's meeting notes have been sent beforehand.
   c. Adjust if you have limited time. Organize the agenda with highest to lowest priority. If you run out of time, your most urgent questions are answered first thing.
2. *Verify everyone can attend.*
   a. Confirm everyone who needs to provide input can attend the meeting at the time specified.
   b. Confirm everyone has ACCEPTED the meeting invite – if they don't accept, it's possible they miss the meeting because it's not on their calendar.
   c. Confirm everyone has access to your meeting platform, for example Teams, Zoom etc.
3. *Virtual or in-person?*
   a. Confirm how people are attending and adjust accordingly. Set up the room, prepare all your documents, models, Google maps etc. before you start.
   b. **Anticipate the need.** Review items you'll need for the discussion based on your agenda. If you know you'll be reviewing the construction type of a building, have the code section open. If you know you'll be discussing a VE topic that goes against the re-zoning stipulations, have those stipulations open.
4. *Feel free to review our meeting outline handout that was distributed late 2022 for a more in-depth review of meeting notes, how to prepare for a meeting and follow up after the meeting.*

How do I start my meeting?

1. *Introductions*
   a. If your meeting is the first time you'll be in a group, make sure to introduce yourself, who you are to the project and then ask the rest of the team to provide introductions so that everyone has an idea of who is talking and what part of the project they will be handling.
   b. Any time a new member joins the group/ conversation, it's good to introduce them or have them introduce themselves so that we have clear visibility on people working in the team.
2. *Objectives/ Goals/ Information*
   a. After introductions, start the meeting by listing any objectives for the meeting.
      i. These should reinforce the agenda, but you don't need to list each one.
      ii. Setting goals for the meeting helps everyone stay on track and helps manage expectations.
      iii. This isn't always necessary for reoccurring meetings.
   b. Mention if the Owner or anyone else has limited time. This way, they can provide input first.
      i. This also applies if you are an attendee, and you must leave after a certain amount of time – mention that at the beginning of the call so any questions for you can be brought up early.
   c. If project status has changed, mention it at the beginning of the meeting. This can affect how people will respond to questions if they know something has changed in the scope of work or timeline.

How do I keep the meeting moving forward?

1. *Use your agenda.*
   a. Once introductions and goals are out of the way, <u>jump into the agenda items</u>.
      i. Be direct about the topic, what the question is or what the issue is. The quicker you get to the point, the better everyone can help solve the problem or review the ask.

    ii. Keep everyone on task. Some people will want to go through all their items first because they want to leave early or get back to work. **Politely** point them to the agenda for when the remaining items will be discussed.
  - **b.** Avoid going down a rabbit hole.
    - **i.** Often, one question can turn into 10 more. Keep the group focused on the immediate topic and, if needed, plan to set up a separate meeting to review additional questions.
  - **c.** Be mindful of changes. If there are significant changes, and you're at 90% CDs – these need to be discussed internally before any commitment. It's okay to defer promising anything and instead let your Owner know that you need to review before answering.
  - **d.** Similarly, avoid promising timelines to anyone if you're not 100% sure you (and your design team) can make those work.
  - **e.** Don't be afraid to say "I don't have that answer…" as long as you follow it with "…but I will find it." No matter the level of your position, it's okay to not have all the answers all the time. Make finding the solution or answer a priority and follow up as soon after the meeting as possible.

2. *Be mindful of your audience.*
  - **a.** Is this a veteran client who knows the industry and knows the terminology? Or is this a new client who needs more communication, more explanation? Is it a Village Planning Committee who might not be familiar with the construction process? Stay professional, but adapt to your audience.
  - **b.** If your client is saying something that might not be accurate, don't point it out in the meeting. Discuss with them separately. They will appreciate your willingness to teach and the respect you show them by not embarrassing them in a meeting.
    - **i.** The exception to this is if they are specifically asking a question or asking for our input in the meeting.

Meeting etiquette and responsibilities

1. *Keep it cordial and professional.*
  - **a.** Sometimes, you must run meetings where people aren't happy.
    - **i.** Speak respectfully. If anyone starts speaking inappropriately, remind them politely that you are all in this meeting to resolve the issue and work together to come to a solution.
    - **ii.** Avoid off color jokes, comments, or sarcasm. Remember that anything you say in a meeting can be used against you. You may mean something as a joke, but if anyone takes offense or feels attacked, it will come back on you and the company.
    - **iii.** Avoid pointing fingers, placing blame and/or throwing anyone under the bus. This will immediately put people in a defensive attitude and once that happens, its nearly impossible to get everyone back to the table to address things cohesively.
    - **iv.** I've included a resource below for how to get a meeting back on track when tensions arise.

2. *Even if you're not running the meeting… you are in the meeting, be IN THE MEETING.*
  - **a.** Participate and engage. Listen to what's going on and take notes. Writing something down helps you commit items to memory. This is also a helpful tool down the road if issues arise.
  - **b.** Stay off your cell phone! Texting, scrolling – it's obvious. Even if you're phone is not in the video during online meetings, or you're holding it under the table in a conference room, everyone can tell when you're on the phone. This can come off very disrespectful and make ORB look unprofessional.
  - **c.** For online meetings, turning video on and off – this is distracting, don't do it. When your video is on, keep it on and stay focused. Avoid a lot of up and down or coming in and out of the room.
  - **d.** Be mindful of your body language. Again, we are on video or in person in these meetings. Don't fall asleep on the call, avoid sitting with your arms crossed looking annoyed or bored. Sit up, stay engaged and again – take notes to help you stay focused on what is going on.

3. *Avoid putting anyone – client, consultant, or employee, on the spot or in a bad position.*

a. Avoid telling people things like "You're wrong," or "That's not correct," or "You're mistaken." This type of language can be very adversarial and can shut people down from wanting to work together for a solution.
b. Remember that contractors, city officials, zoning attorneys and the like are part of the same team trying to get a building completed. Sometimes these other groups can be trying – however we are the primary role to lead this project to permitting.
c. We are an advocate for our client, and they are paying attention to how we conduct ourselves as a reflection of them as a developer. If we embarrass or upset them – they aren't going to come back for another project.

4. *Start and end the meeting on time. If your meeting is going to run over, consider having a second meeting or following up with an email.*
    a. Additionally, plan for enough time to discuss all the necessary topics. If this is a design kickoff meeting, one hour likely isn't enough. Consider allocating 2+ hours and staggering attendees.
    b. Reminder – as discussed in our previous "meetings" ORB University, before setting up a meeting, ask yourself: "Could this be an email?"

How do I end the meeting?

1. *Double check if anyone has questions about their tasks and follow up.*
2. *List action items, deadlines, and response dates*
    a. For example, "Civil is going to reach out to staff on civil permit timeline and get back to us by the end of this week" or "We will schedule a follow up meeting with XYZ Construction regarding the VE items discussed today."
3. **See the meeting outline document for follow up after the meeting.**

Additional resources:

https://www.archtoolbox.com/architecture-project-kick-off-meeting/

https://www.nytimes.com/guides/business/how-to-run-an-effective-meeting

https://hbr.org/2017/12/how-to-save-a-meeting-thats-gotten-tense