

## WorkingSm@rt Meetings Charter + Guidelines

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### Meetings Charter for Teams to Agree

1. Leader PLANS meeting with clear objectives & timing + briefing materials
2. Leader CONDUCTS meetings to achieve objectives + start & finish on time + involving everyone, supported by a Notetaker & a Timekeeper
3. Attendees SHARE Calendars + keep updated to assist those arranging meetings + respond promptly to Invitations
4. Attendees ATTEND meetings on time fully briefed + focus only on discussions during meetings
5. Attendees DELIVER commitments made in meetings on time + update colleagues on progress
6. Leader REVIEWS value of meetings + checks meeting processes are working

# Guidelines

## GUIDELINES – Cultural

1. Everyone should be treated with respect
2. Stick to each agenda item
3. No arguments directed at people – only at ideas
4. Do not interrupt or kill ideas
5. Consider all comments seriously & evaluate them fairly
6. Respect the group's time + arrive on time
7. Read pre-reading before meeting starts to be fully briefed
8. 'Chat' only "To everyone" in meeting
9. Keep cameras on to encourage attention
10. Overall: Everyone is responsible for Meeting Success, not just the Meeting Leader!

## GUIDELINES – Personal Behaviour

1. Don't be defensive if someone disagrees with you
2. No other work/emailing/phone calls during meeting
3. No messaging to people not in meeting
4. Inform Meeting Leader by Chat of temporary absences from meeting

## GUIDELINES – Personal Organisation

1. Open 'Participants' and 'Chat' panels during meeting
2. Use Raise Hand to show the Meeting Leader you have a question
3. Participate in Chat/polling/break-out rooms & remain fully involved in the meeting
4. Make immediate notes of all personal actions agreed during meeting

## GUIDELINES – Meeting Timings

1. No meetings outside working hours
2. Long meetings to be broken into 2-hour segments with at least 15-30 minutes breaks
3. 50 minutes meetings to become the new standard – not 60
4. 25 minutes meetings instead of 30
5. All meetings to start on the hour or **half past** the hour

## **GUIDELINES – Meeting Leader Before Meetings**

1. Book Calendar Meeting with attachments or preferably links:
  - a. Agenda + Meeting Objective + timed items
  - b. Pre-reading – make available in sufficient time before meeting
  - c. Acceptances – track Meeting Responses to check that key attendees have accepted
2. Tech Check - check all functionality working
3. Load Document/Presentation Files ready for sharing on screen
4. Timekeeper – ask someone to remind everyone in Chat of the time remaining for the meeting & for each timed agenda item. Meeting Leader to ensure meetings finish on time + allow regular comfort breaks.
5. Notetaker – ask someone to make real-time notes of agreements/actions (Who + What + When) during meeting + give summaries during/end meeting – ideally notes made in a shared location visible to all (e.g. OneNote)
6. 2nd Screen Tip – Meeting Leader can use a 2nd screen or join meeting twice with 2nd device to view Chat & Participants Panels to avoid cluttering the main meeting screen

## **GUIDELINES – Meeting Leader During Meetings**

1. At Start
  - a. Start meeting 10 minutes early
  - b. Make introductions as necessary + names of Timekeeper and Notetaker
  - c. Explain how people are to use tech to ask questions
  - d. Start recording if required for those that cannot attend + advise everyone
2. Chat Panel & Participants Panels on – ask everyone to turn on
3. Maintain 100% engagement by all:
  - a. Raised Hands – use for quick responses or votes
  - b. Polling/Forms – use regularly + rate meetings at end
  - c. Chat – frequent questions or requests for comments
  - d. Breakout Rooms – Split into small groups to discuss and feedback
  - e. Annotation tools (highlighting etc.) – assists focus viewing docs
4. At End
  - a. Allow time for the Note Taker to read out all agreements & actions for clarity by all
  - b. Arrange for notes/agreements/actions to be accessible to all (or circulated for Guests)
  - c. Arrange for all actions to be followed-up

## What makes a good Meeting Leader?

A good Meeting Leader helps meeting run smoothly & efficiently

- keeping eyes and ears open
- observing the meeting process
- keeping it on track
- watching how people interact
- involving everyone

They make sure that:

- all the business is discussed
- everyone's views are heard
- clear decisions are reached
- the meeting starts and finishes on time

### Overall balance

A good Meeting Leader will also:

- be thinking about meeting overall, not just topics
- hear all views
- never dominate meeting

### Leading Discussions

Being **non-directive** to encourage ideas + more satisfying participant experience

Note: Directive leadership necessary sometimes

#### Non-directive

- Start by asking a question, not volunteering your opinion
- Help quiet people speak up
- Make it safe for people to take risks
- Play the devil's advocate

## Learning to be a Meeting Leader

Meeting Leader needs cooperation & agreement of all – Meeting Leader is not a miracle worker!

Everyone can learn how to conduct well:

- Requires thought and practice
- Confidence comes with experience
- Try watching how other people conduct meetings seeing what works and what doesn't

## Decision Processes

Knowing which decision process to use:

1. Autonomous Decision maker acts unilaterally
2. Consultative Decision maker gathers team input and makes ultimate decision
3. Joint Decision is made by team consensus
4. Delegative one or more persons are delegated authority to decide

## Channel vs Non-Channel Meetings in Microsoft TEAMS

MEETING STEPS	TEAMS Channel Meetings + Benefits	TEAMS Non-Channel Meetings + Limitations
<b>BEFORE MEETING</b>		
Agenda	OneNote in Channel Tab Can be updated by everyone	In Meeting Invitations
Pre-Reading	Links to Files in Agenda	Links to Files in Agenda or attached to meeting
Documents	Files in Channel SharePoint functionality	In Meeting Chat Files Tab (saved in OneDrive)
Meeting Invitation	Created in Channel	Created in Outlook or TEAMS Channel
<b>DURING MEETING</b>		
Chat	Channel Post in TEAM Easy to access after meeting Not accessible to Meeting Guests	Meeting Chat mixed up with other chats/meetings + lost afterwards
Meeting Notes	OneNote in Channel Tab Everyone in TEAM has access + Email to Guests	Meeting Notes not as powerful as OneNote - harder to reference
Actions	Planner Tasks in Channel Tab (N/A in Non-Channel) Everyone has visibility, can be updated between meetings. Saves meeting time + easy to track	In 'Meeting Notes' + email distribution No visibility between meetings Tim? Individuals have to manage
Polling	Forms in Channel Meeting Posts	Forms
Whiteboards	In Channel Tab or Meeting	In Meeting Chat Tab
Meeting Evaluation	Score in Chat Forms/Polls	Forms