

A top-down view of a meeting around a wooden table. Several people's hands are visible, some holding pens and pointing at a tablet. The tablet displays a bar chart with five blue bars of varying heights. There are also papers with charts and a yellow sticky note on the table. A dark diagonal overlay covers the bottom-left portion of the image.

CHANGE THE WAY YOU RUN MEETINGS

6 TIPS FROM 20 EXPERTS



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FOREWORD

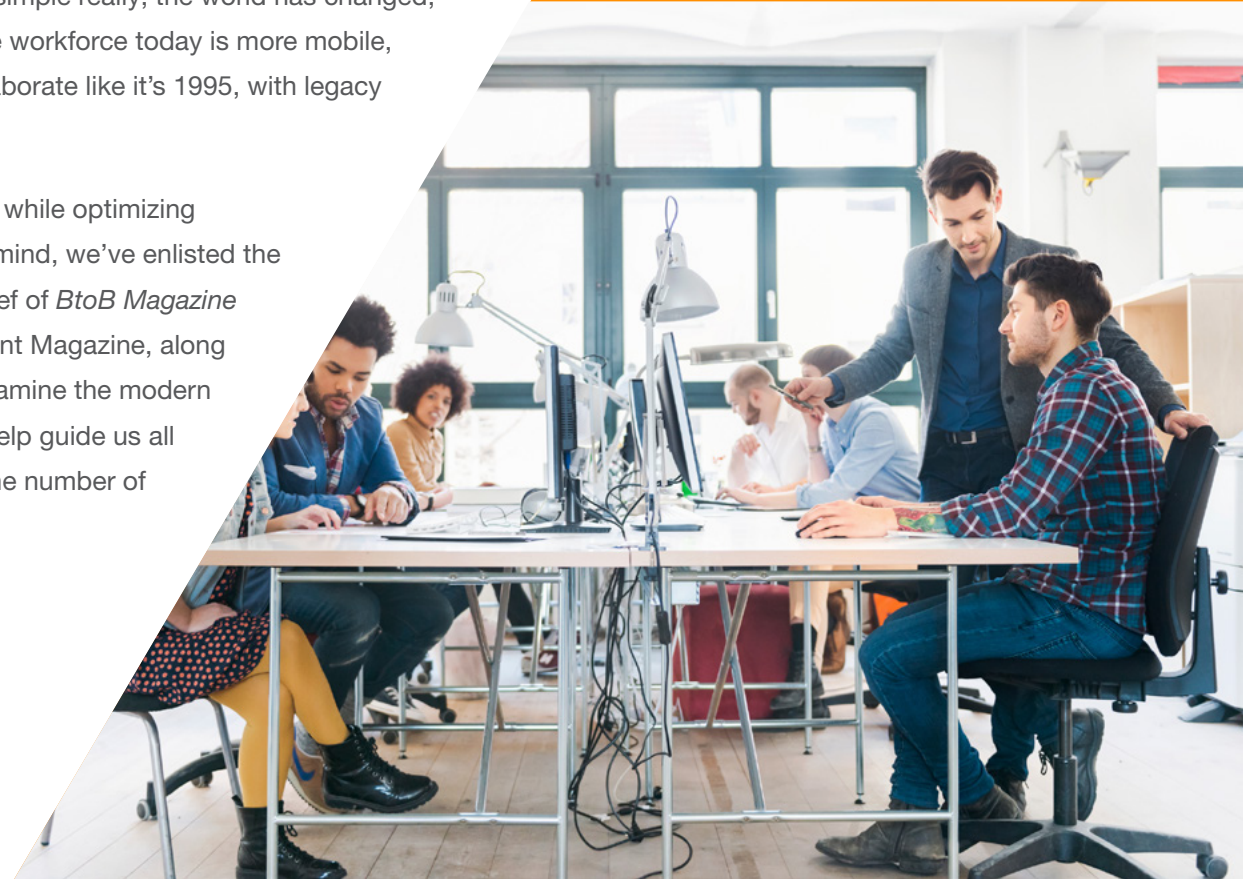
Meetings can be short or long, planned-for or ad-hoc, on-premise or remote. They can also be tedious, contentious, unproductive, exasperating, and a huge waste of time. We've all been there. We've all appreciated the meetings that went well and regretted the ones that didn't.

So why do people continue to have horrible meetings? It's simple really; the world has changed, but for many people, the way they run meetings hasn't. The workforce today is more mobile, virtual, and driven by speed, but many businesses still collaborate like it's 1995, with legacy tools and legacy habits.

As firms continue to look for ways to save time and money, while optimizing productivity, it's time for meetings to catch up. With this in mind, we've enlisted the help of Christopher Hosford, former East Coast Bureau Chief of *BtoB Magazine* and former Editor-in-Chief of *Sales & Marketing Management Magazine*, along with several business and academic all-stars, to help us examine the modern meeting. Together we've assembled a set of tips that can help guide us all through the new world of collaboration so that, hopefully, the number of good meetings we have will outnumber the train wrecks.



— **CRAIG DANIEL**
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MEET THE EXPERTS



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TIP 1: START MEETINGS QUICKLY & KEEP THEM SHORT

“ As futurist Jim Carroll has said, ‘The future belongs to those who are fast.’ We are all so used to getting information quickly, that meetings today must be designed to deliver the message in a shorter and more impactful way. This will be aided by technology, which will continue to drive meeting processes. ”

— PAT SCHAUMANN
DIRECTOR — HEALTHCARE MEETING COMPLIANCE PROGRAM
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“ I HATE IT WHEN MEETINGS START LATE, AND I’M NOT THE ONLY ONE. RECENT RESEARCH SHOWS THAT MEETINGS THAT START AS LITTLE AS FIVE MINUTES LATE ARE LESS SATISFYING, LESS EFFECTIVE, AND LESS PRODUCTIVE OVERALL. ”

— JOSEPH A. ALLEN
ASSISTANT PROFESSOR
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Who doesn’t want to spend less time in meetings and more time getting their work done? While meetings may be a necessary evil, the amount of time we spend in meetings is not always necessary. One solution is simply to start the meeting at the exact time it had been called for, and keep things within a reasonable time frame. While this seems an obvious concept, there seem to be more and more excuses that result in late-starting meetings: No one knows what the “call-in” number is, or the Web conferencing tools aren’t working, or people are stuck in other meetings.

There’s no way to avoid some of these issues, but the key is to push forward when you said you were going to, regardless of hiccups. Even if things start a few minutes behind schedule, you should consider the end time a hard stop to force speedy collaboration. The facilitator should also keep everyone on task and make sure only relevant questions are asked by attendees during the meeting. If a comment isn’t directly related to the topic at hand, suggest taking it outside the meeting at a later time. Most of all, keep the meeting length short, to perhaps just 30 minutes, or an hour in rare cases.



“I HAVE HAD ALL THE CONFERENCE ROOM CHAIRS REMOVED. AS MY TEAM STRAGGLED IN, I ASSURED THEM, ‘WE JUST NEED 10 MINUTES TO GET AN UPDATE FROM EVERYONE AND THEN YOU CAN ALL GET BACK TO YOUR REAL JOBS.’ I SET LONGER MEETINGS FOR 45 MINUTES. EVEN IF WE DO RUN LONG, NO ONE WILL HAVE SCHEDULED THOSE LAST 15 MINUTES ANYWAY.”

— GINGER SHIMP
MARKETING DIRECTOR
SAP NORTH AMERICA

“MEETINGS SET FOR ONE HOUR MAGICALLY TAKE ONE HOUR. MEETINGS SET FOR TWO HOURS MAGICALLY TAKE TWO HOURS. ALTHOUGH SOME MAY SAY THAT THIS IS EITHER BLIND LUCK OR THE RESULT OF CAREFUL PLANNING, IT IS MORE LIKE JUST A CASE OF PARKINSON’S LAW BEING APPLIED TO MEETINGS. PARKINSON’S LAW STATES THAT WORK EXPANDS SO AS TO FILL THE TIME AVAILABLE FOR ITS COMPLETION.”

— DR. STEVEN G. ROGELBERG

PROFESSOR & DIRECTOR — ORGANIZATIONAL SCIENCE

UNIVERSITY OF NORTH CAROLINA AT CHARLOTTE



TIP 2: CHOOSE THE RIGHT TOOLS

“ A full 90% of all communication is nonverbal, so emails and phone conversations often lead to misunderstandings. While many Internet-based meeting tools are useful and important, you should also consider the language you use, how you dress, or the location in which you choose to conduct your meeting. All of these considerations communicate something in a meaningful, nonverbal way. ”

—JEFF MACGURN
SENIOR VP
COVARIO

“ WHY DO SOME PEOPLE REPEAT THE SAME MISTAKES OVER AND OVER AGAIN? PICK [TECHNOLOGY] THAT IS PROVEN TO WORK WITH YOUR DEVICES... FOR IMPORTANT MEETINGS [AND] ON THE ROAD. ”

— NICK PANAYI
DIRECTOR — GLOBAL BRAND
& DIGITAL MARKETING
CSC

We live in a highly mobile world driven by visual technologies. People—especially knowledge workers—are used to seeing immediate results from best-of-breed mobile apps and expect the same out of their solutions at the office.

Ask yourself if the tools you plan to use will help achieve the outcome of the meeting. For example, for a quick call with a partner do you really need a full-blown video conference? Will that partner even want to be on video? If it's an ad-hoc meeting to share a small amount of information, is it necessary to set up an audio and Web conference line, or are there easier ways to share visuals? More and more attendees are bringing laptops and mobile devices to meetings, so there may be less of a need for a projector than you think.

For remote presentations, you'll want an easy-to-use solution, with screen sharing capabilities that are up to par but not so complex that you get tripped up. Most business meetings thrive on interaction, not solitary facilitator presentations, so make sure you're using tools that allow you to seamlessly swap presenters.



“WEB CONFERENCING TOOLS CAN SOMETIMES BE DIFFICULT TO USE. MAKE SURE THE PLATFORM IS INSTALLED AND TESTED A DAY BEFORE THE MEETING BEGINS. IF NECESSARY, SET UP A CONFERENCE BRIDGE FOR PEOPLE WHO ARE TRAVELING (AND AS A BACK-UP), AND HAVE A COLLEAGUE READY TO INFORM YOU BY INSTANT MESSAGE OF ANY TECHNICAL GLITCHES. FOR THOSE WITH BANDWIDTH OR CONNECTION ISSUES, BE READY TO SEND A COPY OF YOUR PRESENTATION QUICKLY IN A SMALL FILE FORMAT.”

— GEORGE STENITZER
FOUNDER

CRYSTAL CLEAR COMMUNICATIONS



TIP 3: MAKE THE AGENDA CLEAR

“ Clearly spelling out the purpose for a given meeting helps inform attendees why the meeting is taking place, either as a stand-alone event or as part of a larger goal. It helps set expectations, accountabilities, and preparation. It also helps keep the meeting topic on track and the group stay focused, where everyone has a full understanding of expectations for each part of the meeting. ”

— RANDALL ROZIN

GLOBAL DIRECTOR — BRAND MANAGEMENT & MARKETING COMMUNICATIONS

DOW CORNING CORP.

“ THE AGENDA DOESN'T HAVE TO BE LONG OR DETAILED, BUT THE KEY ITEMS SHOULD BE THERE IN ADVANCE SO THAT PEOPLE KNOW WHY THEY ARE SPENDING THEIR TIME, AND SO THEY CAN BE PREPARED. AT THE START OF THE MEETING, BRIEFLY REVIEW THE AGENDA. SETTING TIME LIMITS WHEN THERE ARE MULTIPLE TOPICS WILL SERVE TO KEEP THE TEAM FOCUSED.”

— BRUCE BIEGEL
SENIOR MANAGING DIRECTOR
WINTERBERRY GROUP

In today's world of ad-hoc meetings, it's often impossible to have an agenda set up before every meeting starts. That said, you should go into the meeting knowing what the goals are for the meeting, and state them at the start. It also helps to establish time limits for each point and assign an attendee or two to address each. You'll be surprised that the discussion almost always fits the timeframe allotted—people will trim some of what they say knowing there are only 10 minutes to solve an issue.

Last but not least, ensure the agenda is visible to all meeting attendees. Even if you're coming up with a makeshift agenda on-the-spot, type it into a virtual tool for all to see.



“AGENDAS HELP KEEP MEETINGS ON-POINT WHEN PARTICIPANTS DIGRESS INTO UNRELATED ISSUES OR DOMINATE ONE OF THE TOPICS. ONCE THE MEETING HAS ENDED, YOU CAN USE THE AGENDA TO RECAP DECISIONS MADE AND/OR ACTIONS (AND OWNERS) THAT WERE AGREED UPON BEFORE DISTRIBUTING THEM TO ALL PARTICIPANTS.”

— COREY LIVINGSTONE

SENIOR DIRECTOR — INTEGRATED MARKETING CAMPAIGNS

LEVEL 3 COMMUNICATIONS

**“I THINK STEPHEN R. COVEY ONCE WROTE,
‘THE MAIN THING IS TO KEEP THE MAIN THING
THE MAIN THING.’ LET’S BRING THE ISSUE TO
THE CENTER WITH A PARABLE IN LIMERICK FORM:
THERE ONCE WAS A LEADER BEFUDDLED,
WHOSE PURPOSE WOULD OFTEN GET MUDDLED.
THROUGH NO FAULT OR MISDEED
HE WOULD MISPLACE THE LEAD,
LOSING WHEREFORE HIS TEAM HAD BEEN HUDDLED.”**

—BILL STRAWDERMAN

SENIOR DIRECTOR — DIGITAL MARKETING & SOCIAL MEDIA

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TIP 4: MASTER AD-HOC MEETINGS

“ Ad-hoc meetings have a tendency to drift. By making sure you keep the focus on the main goal, question, or issues, you can complete the meeting and get back to what you were working on before it came up. ”

— LISA DREHER
VP — MARKETING & BUSINESS DEVELOPMENT
LOGICALIS INC

“ I PREFER TO BE STANDING DURING SPONTANEOUS MEETINGS AND GENERALLY HAVE ‘ENCOURAGED’ EVERYONE IN THE MEETING TO DO THE SAME. I LIKE TO MOVE TOWARDS CLEAR NEXT STEPS, AND FOLLOW UP THE MEETING WITH NOTES AND ACTION POINTS THAT I SHARE WITH PARTICIPANTS. ”

— PATRICK BRENNAN
BUSINESS DEVELOPMENT DIRECTOR
CREOPOINT

Crises arise, secondary assignments become unexpectedly paramount, and markets shift quickly. We respond with ad-hoc meetings, which may be called for later in the day, or perhaps immediately. Because ad-hoc meetings are more of a norm than an exception these days, you must be prepared to expect the unexpected.

Calling people to an ad-hoc meeting via email is not uncommon, but probably not ideal. It's very easy to miss a last-minute invitation to a critical meeting, especially in remote situations, when that message is buried in a morass of email threads. Here, enterprise social collaboration technology can be helpful, in addition to the trusty telephone.

Though you may have less time to plan for ad-hoc meetings, you can prepare for their eventuality. Touch base with all crucial participants to confirm their availability. Consider your facility needs. And make sure remote attendees have all the information they need to successfully join the meeting on time.



“BECAUSE THERE IS SO MUCH TIME PRESSURE ON EMPLOYEES TODAY, YOU HAVE TO MAKE IT CLEAR WHY CALLING AN AD-HOC MEETING IS SO URGENT. PRESENT THE DETAILS OF THE AGENDA AND ITS IMPORTANCE RIGHT AWAY. MAKE IT CLEAR THAT EVERYONE HAS A STAKE IN WHAT MAY BE AN EMERGENCY, AND THAT ALL ARE RESPONSIBLE FOR FINDING SOLUTIONS TO THE ISSUE AT HAND.”

— NED CLAUSEN
EXECUTIVE DIRECTOR

BUSINESS MARKETING ASSOCIATION OF GREATER NEW YORK



TIP 5: MEET FROM ANYWHERE

“ The biggest challenge to virtual meetings is getting attendees to focus attention and avoid multitasking with email, text, social media, or other distractions. Unless the meeting is very large, go ‘around the room’ to have every participant introduce him or herself by name; encourage interaction via online messaging; and close with next steps, dates, and item owners. ”

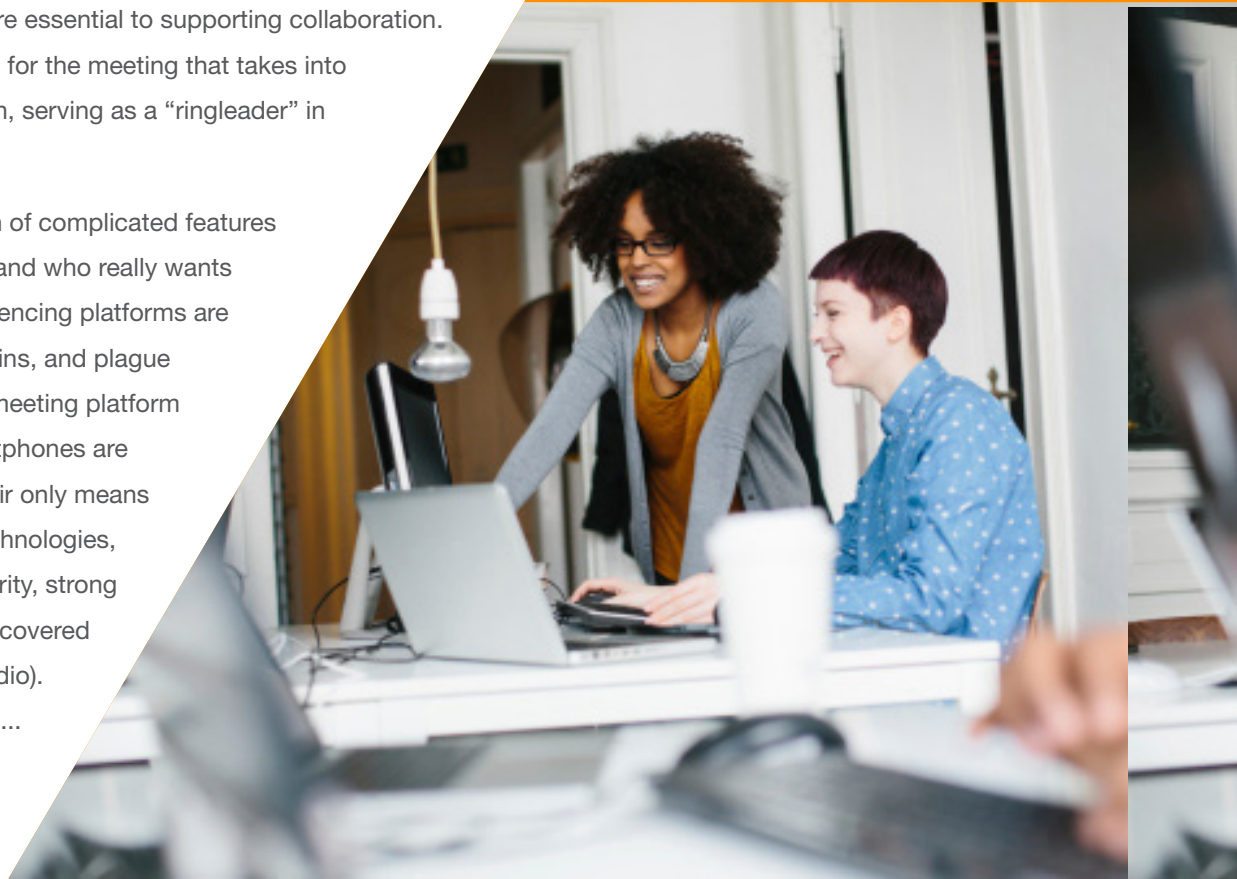
— LISA DREHER
VP — MARKETING & BUSINESS DEVELOPMENT
LOGICALIS INC

“ SET THE GROUND RULES AT THE VERY BEGINNING—MUTE YOUR PHONE, MINIMIZE OTHER DISTRACTIONS, FOCUS. AND CHECK IN FREQUENTLY WITH EVERYONE ON THE CALL. YES, IT MAY SEEM DISRUPTIVE TO HAVE TO STOP A CONVERSATION AND POLL THE AUDIENCE, BUT YOU SIMPLY MUST MAKE SURE EVERYONE HAS A CHANCE TO SPEAK AND BE HEARD. ”

— MATT BRODER
VP — CORPORATE COMMUNICATIONS
DAYMON WORLDWIDE

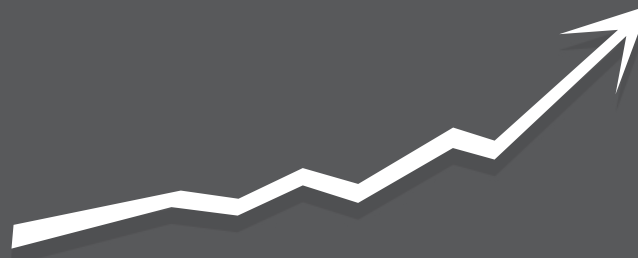
Corporate structures have changed dramatically over the past few years. Team members may be on multiple floors, in different buildings, and working in various cities or countries. Oftentimes, they work from home. But they're no less a team for all of that, and virtual meetings are essential to supporting collaboration. Consider the locations of your team, and set a clear time frame for the meeting that takes into account different time zones. Establish rules for who talks when, serving as a “ringleader” in soliciting discussion and assigning speaking roles.

As for technology, make sure it's adequate but simple. A bunch of complicated features that go largely unused only make meetings harder to manage (and who really wants to involve IT for every virtual meeting?). Yet, legacy Web conferencing platforms are often complicated, costly solutions that require elaborate plug-ins, and plague everyone with device incompatibilities. Make sure your virtual meeting platform is compatible with mobile devices. Tablet computers and smartphones are lifelines for modern day knowledge workers and oftentimes their only means of attending a meeting. And regardless of participants' own technologies, you'll want to make sure the essentials are covered: great security, strong connectivity, and an assurance that the basic technologies are covered (easy scheduling, chat, recording, screen sharing, and clear audio). Remember, your main goal is to run an effective virtual meeting... not to become a virtual meetings technologist.



“TODAY, MEETINGS ARE JUST AS LIKELY TO HAPPEN VIRTUALLY AS THEY ARE IN PERSON, BUT DIALING IN TO A CONFERENCE CALL OR ATTENDING A WEB CONFERENCE PRESENTS SOME CHALLENGES. ONE OF THE BIGGEST ISSUES IS KEEPING VIRTUAL PARTICIPANTS ENGAGED AND FOCUSED ON THE MEETING. ALTHOUGH AGENDAS CAN HELP WITH STRUCTURE, TRY DESIGNING ‘INTERACTION POINTS’ INTO YOUR MEETINGS TO CAPTURE ATTENTION.”

—DR. KERI K. STEPHENS
ORGANIZATIONAL COMMUNICATION RESEARCHER
PROFESSOR & CONSULTANT



TIP 6: FOCUS ON FUTURE STEPS

“ Never end a meeting without concrete action items that include who owns the action and a timeline for a progress report or completion date. It should also be clear as to who will monitor the assignments, how/when results will be shared with the group, and what success looks like. In short, there should be no ambiguity as to who needs to do what. ”

— PETER BLACK
SVP — BUSINESS DEVELOPMENT
BPA WORLDWIDE

“ THE KEY TO RUNNING EFFECTIVE MEETINGS IS TO REALIZE THAT WHAT MATTERS IS NOT WHAT HAPPENS IN THE MEETING BUT WHAT HAPPENS AS A RESULT OF THE MEETING. CONVERSATIONS ABOUT THE PAST AND ABOUT THINGS YOU HAVE NO CONTROL OVER DON'T CREATE RESULTS. ”

— DAVE KASHEN
CO-FOUNDER
MEETINGHERO

Meetings are held for a reason—not to rehash the past but to accomplish immediate objectives and set goals for future problem solving and success. Every meeting carries with it the need to end the meeting with a clear idea of what's been accomplished, what next steps there might be, and which participants are responsible for which actions.

A quick debrief at the end of the meeting is one way to accomplish this. Even more effective is using a meeting tool with a recording feature. After the meeting, the organizer can send a link to the recorded meeting along with action items. That way, everyone involved can focus on the future without any room for confusion.



“THE SUCCESS OF FUTURE OUTCOMES FOLLOWING A MEETING DEPENDS ON A CLEAR OBJECTIVE SPELLED OUT UP FRONT, ON PRE-WORK COMPLETED BY AND WITH THE TEAM OR COMMITTEE MEMBERS IN ADVANCE OF THE ACTUAL GROUP DISCUSSION, AND BY ASSURING THAT A NOTE TAKER IS ASSIGNED TO KEEP PEOPLE ACCOUNTABLE FOR FUTURE SUCCESS.”

**— JON RUSSO
FOUNDER & CEO
B2B FUSION GROUP**



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