This handy primer will help you plan and conduct meetings that achieve their purpose.

How Should Team Meetings Flow?

R.A!R.A! Approach as a Meeting Process

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In organizations today, meetings are utilized as a key communication tool and are considered an important part of doing business, especially in those organizations promoting a team atmosphere, problem-solving attitudes, or where better project management means cost savings or customer satisfaction. If meetings are recognized as important to business and it is understood that individual time is valuable, then why is it that so many people still complain that the meetings they attend are a waste of time?

If meetings are truly important, then meeting organizers should plan properly for the time they ask members to contribute, and they should let their teams know of any good approaches to meeting management and facilitation they find.

A meeting approach that works well for teams should be easy to remember and have a consistent flow that the meeting organizer can follow. The R.A!R.A! approach is a simple acronym for a meeting management method consisting of four tools that help ensure a highly effective meeting: assigned meeting **r**oles, a written **a**genda, keeping **r**ecords, and assignment of **a**ctions. Just as good project management makes for a successful project, proper management of meetings makes them more successful.

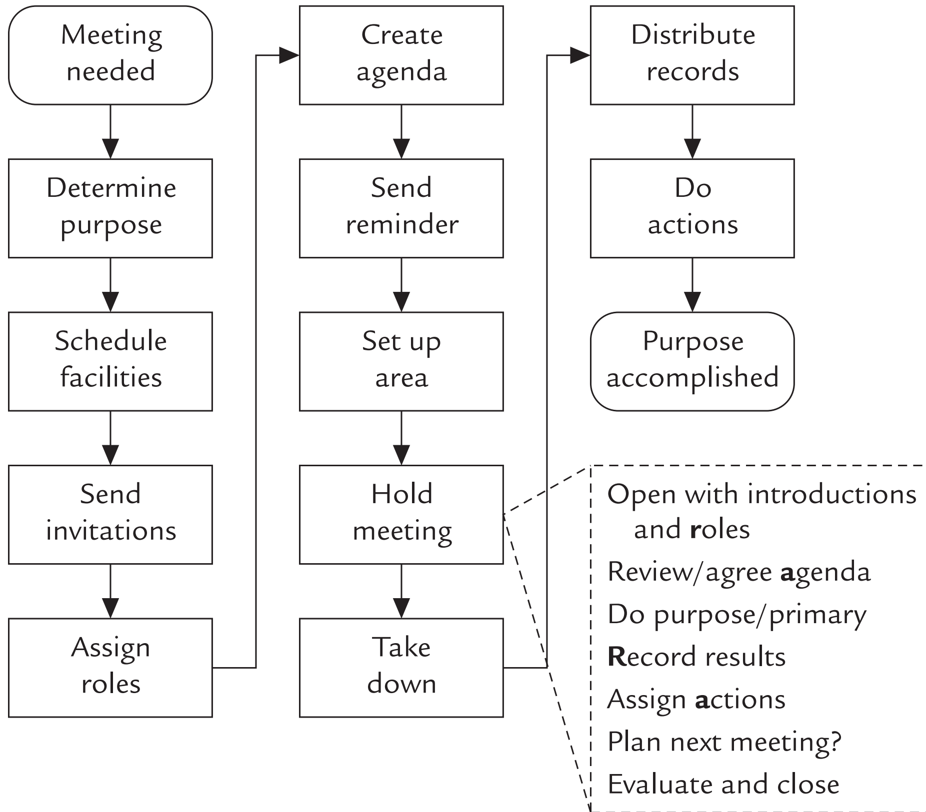
The standard flow for planning, holding, and follow up for a meeting process in the R.A!R.A! approach includes 11 primary steps (most of which involve pre-meeting work), as shown in Figure 1 and described in this article.

Determine Purpose

This step requires the meeting organizer to write a simple statement that will let meeting members know the purpose of the meeting and what it should accomplish. Often, writing a purpose statement will help the organizer know whether a meeting or some other communication method is the best way to accomplish the purpose. Schedule meetings only when member participation is necessary to accomplish the purpose. Putting the purpose into words also helps the organizer determine what type of meeting to hold.

Include the purpose statement with invitations and reminders sent for the meeting. Also use the statement as a guide for creating the agenda, and review it along with the agenda at the beginning of the meeting.

Figure 1: R.A!R.A! Approach



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Schedule Facilities

There is more involved in this step than getting a room large enough to hold all the meeting members, including the following:

- Determine what type of facilities are necessary. A checklist that describes facilities requirements for various types of meetings can be very helpful to the meeting organizer.
- Schedule the appropriate facilities, and make sure to include time before and after the meeting for set up and take down.
- Determine what equipment is needed based on the type of meeting. For example, an idea-generation meeting usually requires flip charts, and a decision-making meeting may require presentations using a projector.
- Verify that the necessary equipment, such as projectors or flip charts, will be available in the room when the meeting takes place.

Send Invitations

Notify the desired meeting members of the meeting's purpose as well as when and where it will take place; this makes it possible for them to decide if they should or could attend. Invited members who are not able to attend the meeting can notify the meeting organizer, which helps determine whether to reschedule the meeting. If the invited member feels someone else is better suited to attend the meeting, he/she can recommend the replacement to the organizer while there is still time to contact the alternate person.

Assign Roles

Select appropriate individuals for specific roles to ensure the meeting runs smoothly. The first role assigned is the facilitator, who will guide the meeting process, make sure the agenda is followed and the purpose is accomplished using appropriate methods, and will recommend techniques or tools the team may use to better accomplish each agenda activity. The facilitator role may be filled by the meeting organizer, project or team leader, or an independent person brought in specifically because he/she has the facilitation skills and training needed to help accomplish the meeting's purpose.

The second role to assign is the recorder. This person will keep a visible record, which all members can see during the meeting. The recorder details what happens in the meeting, and helps keep the members focused and the meeting on track to accomplish its purpose. Depending on what the meeting is to accomplish, the recorder may or may not be a member of the team; at times, it is best if the entire team participates in the meeting.

Of course, the primary meeting role is serving as a member, which involves helping to share ideas, solve problems, or make decisions. Other roles such as observer, presenter, timekeeper, etc., are assigned as the team feels necessary.

Create Agenda

The agenda supports accomplishing the meeting's purpose and the facilitator uses the agenda work once the meeting begins. Write the agenda with action words stating what the participants will do at the meeting. The agenda should list the start and stop time for each activity item as well as the person responsible for leading that item if it is not an activity involving the entire team.

Some examples of typical agenda items for a problem-solving meeting include the following:

- Review results of problem analysis.
- Discuss biggest problem.
- Generate possible solutions.
- Narrow list of solutions.

Send Reminder

Take care of this step at least two days before the meeting is scheduled. This notification reiterates who needs to attend the meeting and when and where the meeting will take place. If the reminder is done via phone call, then the message should indicate a contact person to notify about changes. Often it is preferable to provide a written reminder that includes the agenda created in a previous step instead of a voice reminder. Providing the written agenda lets all members know what is expected to occur in the meeting.

Set Up Area

Everything up to this step occurs days prior to the meeting, whereas the setup is done the day of the meeting. Generally, this happens about one hour prior to the meeting start time. The meeting organizer, facilitator, and/or recorder typically take care of the setup and verify that all the equipment needed for the meeting is present and working. Time is allowed for the facilitator or recorder to write/post the agenda where everyone can see it during its review at the beginning of the meeting. This also is the best time to place handouts or other materials at the members' seats. Providing setup time ensures the meeting will not start late because of missing equipment or materials.

Hold Meeting

This is when the team gets to work on the activities necessary to accomplish the purpose of the meeting, emphasizing the tools of the R.A!R.A! acronym. The dashed box coming out of the "Hold meeting" step in Figure 1 gives the suggested order a meeting should follow to help ensure success.

A good meeting opens with quick introductions, if needed, and a review of who is assuming particular roles. Then the facilitator goes over the agenda and gets agreement on it from all members, which makes it easier to stick to the times listed, aids in getting the purpose accomplished, and can help refocus the team if a distraction occurs.

At this point the meeting really gets going, and the members work to accomplish their primary purpose by completing all the activities listed on the agenda. While working through the activities, the recorder lists meeting results on flip charts or a marker board so everyone can see the meeting's progress. The recorder

About the Book

The ability to lead in today's business world depends on the ability to facilitate productive discussions, and meetings are the primary approach used to bring people together to generate consensus and change. *R.A.!R.A.! A Meeting Wizard's Approach* provides tools to increase the value of meetings, as well as an 11-step process that ensures every meeting accomplishes its purpose. This book is a quick read with easy to apply techniques that can help you transform meeting results.

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also tracks any action items as participants mention them.

In the closing 10 minutes of the meeting, the team assigns actions, plans its next meeting if one is necessary, evaluates how the meeting went, and officially closes the meeting by thanking the members for their work.

Take Down

During this step, recorded information is gathered and the meeting area is restored to the way it was found as a courtesy for the next team that uses the facility. Although this process typically does not take as much time as setup, allow the same amount of time. Take down is usually done by the same individuals who did the setup; however, a few other members often will stay and help. The recorder takes the records created in the meeting, making sure no documents are left in the room.

Distribute Records

This usually is one of the first things done after leaving the meeting location. It starts with taking the visible records from the meeting and converting them into meeting minutes. Within two days of the meeting, these minutes are sent to all members and copied to other interested parties.

Team minutes should follow a standard format using either data type or category-specific headings. For example a heading of "Decisions Made" is very useful for managers who get copies of team minutes because they may be primarily interested in what decisions were made, how they were made, and why the team feels that was the best decision. On the other hand, minutes for a one-time meeting may follow its sequence and not require headings other than those that were assigned in the meeting.

Place team minutes and copies of the handouts or other meeting and project materials on a common server or in a notebook where members can review them at later dates if needed.

Do Actions

Work outside the meeting room gets accomplished to carry out the meeting's purpose. Complete actions assigned during the meeting by their due dates—typically prior to the next meeting, although some projects or data requirements may push the deadlines out a few weeks further. Assigning actions gives members the opportunity to contribute at an individual level and ensures personal responsibility and accountability for achieving the overall purpose. Having a due date lets the members plan their time outside the meeting for personal productivity.

Summary

The R.A!R.A! process for planning, holding, and following up on a meeting can generate more effective meeting management and better organization. By using the four tools in the R.A!R.A! approach, organizers and meeting members will find that meetings run more smoothly and more gets accomplished in the same or less time than before. This leads to increased productivity and morale of team members, better communication across the organization, faster problem solving, and reduced costs.

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