



SOCIETY OF ACTUARIES

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# Like Death and Taxes—Meetings!

by Paula Hodges

The workday is consumed with meetings for many of us. Like death and taxes, they are a part of our lives. Even so, we spend a disproportionately small amount of time exploring ways to make this time more productive. Depending on your role in any particular meeting, you can certainly influence the tone, substance, and engagement of the attendees when you are a key participant. This is especially true when you have the role of moderator at the meeting.

If you've never considered yourself a "moderator", answer the following questions:

- Have you scheduled a meeting with several subject matter experts?
- Have you been in a situation where a decision had to be made, and you brought together the decision makers to come to the right conclusion?
- Were you ever in charge of bringing in external consultants to review a business process, design a product feature or analyze a business strategy?

If you answered "yes" to any of these questions, you've been a meeting moderator. As a moderator, there are four key areas for which you are accountable. Depending on the meeting's focus, visibility and corporate impact, you should adjust how you allocate the effort put into each of these items. You will be responsible for Planning the Meeting, Setting the Stage, Facilitating the Meeting and assuming the role of Timekeeper.

## Planning the Meeting

This is the most time-consuming, but most crucial element of your moderator role. It includes all the pre-work for the meeting—from the basic elements, like reserving the appropriately-sized conference room; to the complex task of coordinating the roles of key meeting participants. The details of what might be included in the planning process are numerous, but here are a few key components.

## The Agenda

The first rule about the agenda is to *have one!* Write down the purpose of the meeting, the topics that will be discussed and the expected outcome of the meeting. As part of this exercise, you will probably discuss the agenda with key attendees, which brings us to the second rule on agendas—you need to pre-meet with those attendees who will be influential in the meeting, either as supporters or detractors, or simply due to their status in the corporation.

The pre-meet can be informal in a one-on-one setting. The purpose of the pre-meet is to ensure that those key individuals are also prepared. They may have suggestions for your agenda, so be sure to review the draft that you have prepared. When you walk away from each pre-meet, you should understand their position on the subject matter, and they should walk away with a clear understanding of their role in the meeting and how much they should prepare. This will give you an opportunity to ensure your agenda topics are covered completely, without redundancy and it could expose some differing opinions.

## The Format

The meeting format may be decided before or after you have some of your pre-meets. Some examples of meeting formats:

- Informational meeting—One or more subject matter experts are scheduled to talk through material that is new to most attendees. The Question/Answer period will fall mostly at the end of the presentation.
- Debate—Different valid viewpoints exist on a topic. The meeting won't necessarily resolve the issue, but details need to be brought forward and discussed.
- Workshop—Progress needs to be made on some focused area of work. The workshop participants are actively identifying issues and moving forward during the meeting to resolve them.



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### Room Logistics

The format of the meeting will prescribe how your room should be set up. The room layout and equipment will be the focus. You may want to have a checklist of the things to consider in setting up your room:

- Room layout—workshop setting, round tables for breakout discussions, one round conference room table
- Flip charts
- Whiteboard
- Overhead projector
- Conference phone
- Internet connection for Web access

The details of acquiring these items can be delegated to an administrative assistant, but the decisions regarding the needs lie with you.

### Practicing

Ensure that the key presenters of the meeting know the amount of time they will have for any prepared remarks. This does not apply for some meeting formats, but is vital for others. If the meeting consists of mostly prepared remarks, you may want to do a practice run with the presenters, to ensure that they understand the time constraints and can meet your requirements.

Your role as moderator will involve opening remarks and wrapping up the meeting. In addition to encouraging your presenters to practice, you should practice your own speaking role.

### Setting the Stage

Arrive to the meeting early. If possible, check the room logistics early in the day, to make sure the room is set up as you requested it and with all the items that you ordered. By checking early in the day, there is more time to make last minute corrections, if necessary.

As people arrive at the meeting, make them feel welcome. Casual conversation as they

enter the room will put them in a collaborative mood and create a friendly atmosphere. It is especially intimidating for junior-level attendees to walk into a meeting room with more senior people who are all silently waiting for the meeting to start. If people are expected to participate in the meeting, you can influence that the moment they walk in the door by greeting them with a smile and some light small talk.

As moderator, it is your job to officially start the meeting. In your opening remarks, it is very helpful to restate the purpose of the meeting. By stating it verbally, it sets the stage. Then, if the discussion later veers off course, the initial agreement of the group to the meeting's purpose gives you permission to bring the discussion back on track.

The meeting format should be reviewed for the benefit of the group. Briefly discuss who will be talking, and whether questions will be entertained throughout. If there is more than one person in a formal presentation role, take the floor between the speakers to provide a smooth and natural transition from one presenter to the next. Try to provide a logical segue from the speaker who just finished to the speaker who is about to present.

### Facilitating the Meeting

The success of the meeting may be dependent on your skills as facilitator. In this role, you will keep the discussion on topic and, near the end of the ses-

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sion, ensure that the Q&A is incorporated effectively.

Business meetings can often stray off-topic. When the off-topic conversation seems to be taking over your meeting, it is your job to bring it back. One approach to bringing the topic back into focus is to call it out to the group, stating that the agreed-upon purpose of this meeting is “x” and that the discussion on “y” may need a different group of people. Request that “y” be addressed at another time, with the better group to discuss that issue.

Another example of how the discussion can move off the stated agenda is an off-topic question asked by a well-intended audience member. If an off-topic question comes up, the answer should be brief. If follow-up questions move further off-course, suggest that the topic can be addressed offline.

If Q&A is part of the meeting, be ready to ask the first question. The first question often breaks the ice, and others soon follow. When they do, be sure that the entire group is able to hear the question. Repeat the question if necessary.

Another part of facilitation is to bring attention to action items. As follow-up items are identified, the facilitator should clarify who will be responsible for the action item, request a target date, and the means by which the owner will report back to the group. The notetaker (ideally someone other than the moderator) will thank you for making these points clear during the meeting.

### Timekeeper

Be sure to have a watch, cell phone, or wall clock in view during the meeting, so that you can get people out of the room on time. During the planning of the meeting, you should get an idea of how much time should be allocated to

various agenda items. Each agenda item should be well thought out, and the last agenda items are not necessarily the least important. Often those items get squeezed in or omitted completely. For these reasons, the agenda should rule, and the timekeeper should make sure that transitions between agenda items are kept on time. Adjusting the agenda during the meeting can be challenging.

If the first agenda item is taking much longer than planned, you may discover that your planning did not give appropriate time to the topic. At this point you might want to get group consensus on whether to continue with the current topic, at the expense of later topics, or whether to move on. You may need to get the group’s permission to call an additional meeting. Be sure you have their commitment to attend this additional meeting if this is the approach you take.

### Conclusion

Meetings certainly have their role in corporate business. And, like death and taxes, there’s no way to avoid them. The good news, however, is that while ineffective meetings can sap time out of your day and everyone else’s, meetings that are run effectively can be extremely valuable and informative and, actually, be the way that work gets done. When you take on the role of moderator, you have the opportunity to influence whether you’re wasting your time in your meetings or getting the best out of your colleague’s participation and your own. So plan ahead, set the stage, facilitate effectively and manage the time. And, unlike death and taxes, people may actually look forward to your meetings! □