

Meetings *of the Mind*

The traditional sit-down may bring the team together but can also damage morale if not conducted properly. **Evan Thompson** shows us how to bring the joy and purpose back in meetings



We've all had them: run-of-the-mill, unnecessary meetings. Some of us haven't been able to find the sweet spot between too many meetings and efficient team communication to stay on top of everything happening in the office. We obviously need meetings but we also need to get work done. So how can we run more focused meetings that leave staff charged and engaged to meet practice goals?

Here are seven dos and seven don'ts to ensure your team meetings go from ho-hum to don't-want-to-miss.

Whenever possible, DO respect people's time.

While financial services is a fast-moving industry, try to give people sufficient notice when you schedule a meeting.

DO begin the meeting on a high note.

You can do this by saying something like, "We've got some important items to discuss today and your input is appreciated."

DO circulate an agenda in advance.

Keep the agenda focused and offer three or four goals for the meetings. Those objectives should positively affect attendees whether they are in administrative support or portfolio managers.

DO be punctual.

If you have a situation where people are constantly late for meetings, wait five minutes and begin without them. As word spreads that you begin meetings on schedule, people will show up on time.

DO include everyone in the meeting.

Make all team members feel that their well-considered opinions and ideas are welcome and worthy of consideration. Scan the room for attentive and non-attentive attendees. Body language makes it obvious who is contributing and who would rather be elsewhere. Watch for people who are trying to get the floor but are having trouble and giving up. Consider saying, "Andrea, I see you wanted to make a point. Would you like to share it with us now?" If she shakes her head, say, "Thanks, Andrea. I'll assume we covered your point to your satisfaction."

One way to encourage participation is to suggest attendees imagine that the meeting is being taped before a live studio audience and broadcast live to their bosses, clients, prospects, media, and other stakeholders in their success. This way they will pay attention, think before they speak, respect one another's views, and add more to the meeting.

DO offer a succinct summary of the meeting.

This should list all the action points. Emphasize that another meeting will be called to determine how well the team implements agreed-upon tasks. Make sure everyone is clear about his or her roles and invite final questions before ending the meeting. If you wish to distribute minutes, do so within 24 hours. Your follow-up is a good indication of your commitment and leadership skills.

And now for the don'ts.

DON'T rush through things.

I have heard hosts suggest that because it is a nice day, they will move through the agenda items as quickly as possible "to get us out of here." Rushing diverts attendees' attention from the business at hand. It may also devalue the meeting's importance and make them wonder why they are there in the first place. Worse, it can demotivate those who want to make a contribution but are fearful of alienating colleagues and a host who would rather be elsewhere.

DON'T downplay the value of the meeting.

All that does is ensure most attendees will quickly leave the room — in their minds, at least.

DON'T exclude some attendees from personal conversations.

Watch that your banter doesn't make other attendees feel as though their presence is not necessary. Save socializing for outside the office.

DON'T present the meeting to attendees as a chance to relax and catch up.

You are meeting for a purpose and that should be client service or asset building. Keep business and pleasure separate. Plan an official offsite event or in-house lunch or holiday party to thank your team for their efforts instead.

DON'T call on people to speak who are clearly shy because they have not participated in the conversation.

This can make people unnecessarily uncomfortable. They may be taking notes or paying close attention, which is their way of contributing. Instead of singling them out, talk to them after the meeting and invite them to add their ideas at the next one.

DON'T allow the meeting to be hijacked by one or two outspoken team members.

There are always those people who intimidate others, and if you're not careful, your meeting will get off track. To stop this behaviour, say, "Your ideas are important and I would like to hear more later. Let's hear from other members on the team."

DON'T stray from the agenda.

A lot of team leaders love launching into personal anecdotes that have nothing to do with business at hand. This will make you lose sight of your goals. An exception might be relating a conversation you had with a client, or something you read about the investment or insurance industry that would enlighten the team. While being friendly and collaborative as meeting leader is important, remember to keep your role clear and keep things moving.

DON'T have meetings for the sake of meetings.

Thirty-minute update meetings at the beginning of the week can unify the team and keep everyone in the loop. If these can be held on a monthly basis, so much the better. The number of team members, the assets under management, and campaign frequency in your office will help you decide the best meeting frequency and duration for your team. 📍

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