

Leading Team Meetings and Briefings



Name: _____

Leading Team MEETINGS AND BRIEFINGS

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Introduction

Information and skills you will acquire

Leading Team Meetings and Briefings is one of a valuable and user-friendly new series of easy-to-read booklets created specially to help you develop your skills at work. The materials have been written from actual experience in workplace training. Experts from Workbase Training and Campaign for Learning have pooled their knowledge and experience to involve you in learning new skills and building on those you already have. This booklet is divided into clear *sections*, containing specially devised *activities* and a *mini project*, to allow you to practice as you learn.

Leading Team Meetings and Briefings will enable you to:

Getting the most out of this booklet

- Prepare for team meetings and briefings.
- Run a team meeting or briefing effectively.
- Cope with any difficult situations which may crop up.
- Ensure that the meeting or briefing has achieved its purpose and any necessary follow-up happens.
- You may want to work your way through the booklet from start to finish or focus on an area of interest.
- Once you have completed the questionnaire on page 4 you will be able to see clearly which topics you need most help with, and which areas you can safely leave out.
- The questionnaire will also allow you to create your own learning plan for which an example and space is provided on page 5.
- You may want to ask your supervisor or another colleague for their views on the areas you could work on, or for help with the activities in the booklet.
- As you may want to use the booklet for future reference, you may want to write the answers out in rough first and then write them in the booklet.

Questionnaire

This questionnaire is to enable you to think about what skills in leading team meetings and briefings you need most help with.

Tick boxes as appropriate.

What do you need most help with?

SECTION 1:
Preparing for team meetings or briefings

SECTION 2:
Running effective team meetings or briefings

SECTION 3:
Coping with difficult situations in team meetings or briefings

SECTION 4:
Achieving the purpose of the meeting or briefing

Following up after the meeting or briefing

	1 I need a lot of help	2 I need some help	3 I can cope
SECTION 1: Preparing for team meetings or briefings			
SECTION 2: Running effective team meetings or briefings			
SECTION 3: Coping with difficult situations in team meetings or briefings			
SECTION 4: Achieving the purpose of the meeting or briefing			
Following up after the meeting or briefing			

The most important areas for you to work on are those which you have marked 1 or 2.

Section I

PREPARING FOR YOUR TEAM MEETING OR BRIEFING

Why is preparation necessary?

Whether you are leading a team meeting or briefing, you still need to prepare in advance. If you think you are the sort of person who speaks more effectively 'off the cuff' and preparation is not really necessary, you will find that this is not the case with meetings and briefings.

All meetings and briefings need some thought in advance, to prepare what you are going to say and what you want everyone to get out of it.

The difference between a team meeting and a briefing

A meeting involves getting together people who are involved in a specific topic or work situation e.g. working together in a team or involved in a particular project. The meeting will have an agenda or list of items to be discussed. The objective is to discuss the topic as a group and give all the participants an opportunity to contribute.

A briefing involves getting together people who are involved in a specific topic or work situation e.g. working together in a team or involved in a particular project, to inform them about a particular topic or range of current topics. The objective is to pass on information and to give participants an opportunity to ask questions and give their views on the topic.

You will see from the above explanations that as a meeting leader, the emphasis is more on you seeking contributions from meeting participants. As a team briefer, the emphasis is more on you passing on information.

Format for a team meeting

Regular team meetings help to develop the members' sense of belonging to a team and common purpose. The meetings need not be long, perhaps half an hour or so, once a fortnight. Any minutes should be kept brief and circulated quickly.

The following items could be included:

- Brief feedback from each member on what is happening in his/her area of work – progress, problems, solutions, plans.

- If you are leading a briefing, tell people what the briefing is about beforehand and write up some short notes, which can be circulated afterwards if people are interested.

An Agenda

Agenda

Quality Section Weekly Team Meeting

Monday 7 January 20XX, 2 – 4 p.m.

Meeting Room 3

Items:

1. Actions from last meeting and matters arising
2. Individual progress reports
3. New quality system procedures
4. Staff vacancy.

Summary

It is good practice to make sure that all actions from the previous meeting have been carried out at the start of the meeting. This is usually item No. 1 on the agenda.

- Try not to put too many items down, as the meeting will go over time.
- Always give the meeting a deadline, so that you complete the business efficiently.
- Put the most important items at the top of the agenda.
- Allow colleagues to put other items on the agenda if they are very important to everyone.
- Only include items which are relevant to the team as a whole, otherwise hold a separate meeting with the individuals concerned.

A team briefing note

Briefing Monday 7 January 20XX

Briefing note to the quality team on the new health and safety procedures

Background

An accident took place last December in the production line rest room. One of the production line staff slipped on soup, which had been spilt on the floor by a colleague. The victim suffered a broken hip and severe bruising.

New procedures:

1. Staff should not wear their protective rubber boots away from the production line, including the rest room.
2. Any spillages anywhere on the premises should be reported immediately to the cleansing office.

Summary

- Briefings are not limited to one issue, they can include any number of current topics.
- If there is more than one topic, make sure that each topic is given a number and a new heading.
- Keep the note as short as possible and stick to the main points.
- If the topics are very important, such as the example above, make sure that everyone, including those people who were absent from the briefing, receive a copy of the briefing note.

Activity 2

Draft a short briefing note or an agenda for a team meeting or briefing you have led or are likely to lead in the future.

You will find the feedback to this activity on page 21.

Key Learning Points

- Always prepare for your meeting or briefing in advance.
- Be clear about the purpose of your meeting or briefing, and be sure that you understand the difference between them.
- For a meeting, prepare and circulate an agenda in advance of the meeting.
- For a briefing, prepare a short note of the main points and circulate this, if necessary, at the end of the briefing.

Section 2

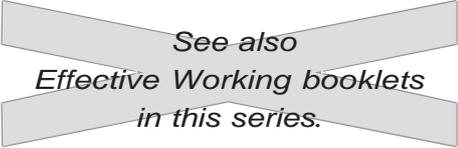
ENSURING A MEETING OR BRIEFING RUNS SMOOTHLY

Your role as leader

As leader of the team meeting or briefing, your main job is to ensure that the purpose is achieved and the meeting runs smoothly.

In addition, there are other tasks which you have to manage:

- defining the purpose at the start of the meeting or briefing
- planning and preparing before the meeting or briefing
- controlling the discussion without doing all the talking
- avoiding conflict
- encouraging the group to contribute, listen to each other and develop points put forward
- asking 'open' questions so as to draw out contributions
- keeping to time
- achieving the purpose of the meeting and making sure that members of the group know what is expected of them
- recording what was agreed, where necessary, or making sure that someone else does this.



*See also
Effective Working booklets
in this series.*

If you feel that those present need help in knowing what is expected of them and making their contributions more effective, please see Booklet 24 "Contributing to Meetings".

How to start a meeting or briefing

Explain the purpose of the meeting or briefing. For briefings which have been called to explain a particular topic, you may want to give some brief background on the topic, e.g. how the issue arose.

For regular briefings or meetings which are held, e.g. weekly or monthly, it is not necessary to do this. However, specific items or topics may require you to give some background information.

At the start of the meeting or briefing, always remind people of the finishing time. If the participants do not know each other, ask them to introduce themselves. For meetings, circulate the agenda, if it has not been

given out in advance. For briefings, remind people that they will be able to comment and ask questions at the end.

Maintain a sense of progress

A meeting involves a lot more contribution from participants than a briefing. However, these contributions have to be restricted to the purpose of the meeting.

Meetings

As leader, try to follow what is being said at the meeting, rather than focusing on your own contribution. Your role is to steer. Groups often forget what they have discussed and agreed, and can lose sight of the ground they have covered. This can be prevented by the leader summarising at different points of the discussion, e.g:

- the main issues raised
- what the group has agreed/failed to agree
- milestones
- clarify misunderstanding
- interim and final summaries of the discussion.

Briefings

During a briefing, you will be doing most of the talking and will allow time at the end for people to make comments and ask questions. If your briefing lasts more than ten minutes, you will need to make sure that people are following what you are saying. You can do this by putting headings for the main points on a flip chart or overhead projection. Please see Booklet 26 'Making Better Presentations' for guidance on how to prepare these and also to help you with your presentation.

If your briefing is short, your briefing notes will be sufficient.

Ending the meeting

At the end of the meeting, as the leader, you will help participants by summarising the main points and directing people to what happens next. If you are discussing a number of items, it is best to summarise at the end of each item.

Let people know if you are going to circulate minutes or action points.

Activity 4

Below is a list of the skills which a leader of a meeting or briefing may be required to use to make sure that the meeting or briefing runs smoothly.

Tick three skills which you think are the most important ones for you to practice:

- explaining the purpose at the start of the meeting or briefing
- controlling the discussion during a meeting and at the end of a briefing without doing all the talking
- avoiding conflict
- asking 'open' questions which will draw out contributions
- keeping to time
- recording what was agreed, where necessary, or making sure that someone else does this.

You will find the feedback to this activity on page 21.

Key Learning Points

- Remember that there are a number of things, which you need to do at the start of the meeting or briefing. The most important is to explain the purpose of the meeting or briefing and to let people know what is expected of them.
- There are some differences in the way that a meeting and a briefing are run. A meeting requires contributions from those present throughout, and a briefing requires contributions at the end.
- Give out your briefing notes at the end of the briefing. At a meeting you would summarise the main points and let people know what happens next.

Section 3

COPING WITH DIFFICULT SITUATIONS

There are always difficult situations, which crop up at meetings and briefings. Not all of those present will be co-operative and friendly, and some may be anxious.

Here are some of the most common situations you are likely to come across:

Unpopular decisions

Present the decision, let people know that you understand that they are unhappy about it and then move on to the positive aspect. If there are members of the team who support the decision, encourage them to express their views, these often carry more weight than those of the leader.

Bad news

If you are a leader, you have to report bad news sometimes. Try to find a positive side but do not let yourself sound glib. Explain the reasons for the news fairly and openly. If there is no positive side at all, do not try to create one. People are not easily fooled.

Lack of interest

There are a number of reasons why people may seem bored and lacking in interest. This could be because:

- the wrong topics have been selected for the meeting and people think it's a waste of time
- there are too many items or information included so people's attention is not held
- the team are not clear about the relevance of the meeting or briefing to them
- people feel unhappy about the topic and the effect it will have on them or their colleagues.

What you can do to help

As soon as you are aware that there is a problem, for the whole or most of the team, such as lack of interest, don't try to follow your usual plan for the meeting or briefing. Instead, ask open questions to individuals, which will hopefully tease out the real problem, e.g.

'How does this affect you?'

'What do you think should happen?'

'Are you involved in this issue?' 'What do you think about this?' 'What are your concerns about this?'

'What would you have liked to see happen instead?'

Once you have found out what the problem is, it is advisable to talk about it first of all and get it out of the way. If possible, try to allay fears and concerns, because people may have got the wrong information 'on the grapevine.'

If there is a genuine concern about something of more importance to the group, find out what it is and handle it first of all.

Once this has been achieved, you can go back to your original agenda. Keep sensitivities in mind. Try not to repeat information you may have discussed already.

If you are having problems with just one or two people in the group, it is best to talk to them individually after the meeting or briefing. Ask them how they found the meeting or briefing. If they don't open up, say that you 'wondered how relevant they found the meeting' or ask 'does it affect you in your job?'

If people still do not tell you what is going on, then it is better to leave the issue for now, but carry on being friendly and communicating with them so that in the future they might feel comfortable enough to talk. Shyness could be the problem.

Personality clashes/arguments

Only allow one person to speak at a time. If there is an argument, stop people talking and remind them of the purpose of the meeting. Bring someone else into the discussion, who you know will not enter into the argument.

Steer things away from personalities to facts e.g. what happened, rather than what someone did or didn't do.

Identify the point of disagreement in your summary, if this is not obvious. Summarise the points of agreement and move on to the next issue.

Over-talkative person

Take up one of the statements and ask the group what they think. If you think too much of the group's time is being wasted, do not be afraid to interrupt as you risk losing the rest of the group's attention.

Discussion going off track

This can be a sign of lack of interest. The group may start talking about other things or asking irrelevant questions. If there is something else which is worrying the group it is best to deal with it. Otherwise frequent summarising will keep the discussion on course.

Activity 5

Abdul is a new supervisor and running his first ever team briefing. He has been asked to talk to your team about a new system of Performance Related Pay (PRP), which the organisation is bringing in.

Abdul is new to the organisation, so he does not know the people or what will be going around on the grapevine about PRP.

He has prepared thoroughly for the briefing. He starts off and is met by stony faces and people making sneering comments to each other.

What can Abdul do? There is no point in carrying on with his briefing as planned. Write your suggestions in the space below.

You will find the feedback to this activity on page 22.

Activity 6

You are running a meeting for the first time and have two difficult characters to deal with.

In the middle of the meeting they launch into a full-scale argument about whose fault it was when the production line broke down recently.

What do you do? In the space below, suggest how you might manage this confrontation.

You will find the feedback to this activity on page 22.

Key Learning Points

- Always be aware of the people at your meeting or briefing and how they come across to you. If most of those present seem completely uninterested, ask them if they have any concerns, how relevant the issue being discussed is to them, etc.
- If someone is over-talkative, don't let them take over the meeting but pick up on one of their comments and ask other people what they think.
- If you are faced with an argument, stop it as soon as you can and get back to the purpose of a meeting.
- If the meeting starts to go off course, remind people of the purpose of the meeting and the finishing time.

Section 4 TAKING NOTES AND ENSURING FOLLOW-UP

Meetings

You can check that a meeting has achieved its purpose by giving a brief summary of the main points at the end, or summarising at the end of each item.

To keep track of points raised at the meeting, you need to make some basic notes. These need be nothing more than a brief note of the main points and actions. Leave a space to come back to an item if you have not completely understood what has been said. It is best to clarify a point straightaway, while it is still fresh in your mind. It is helpful to make your notes in the following format:

Notes on team meeting 3/12/20XX		
Item	Action or main point	By whom/ when
1.	Holiday closure has prevented delivery. To re-contact supplier at the end of the week.	Bob 11/1/20XX
2.	Not going to move notice board – it would be in the way of the entrance.	
3	New starter joining team 14 Jan. Induction to be organised.	Chantelle 11/1/20XX

Briefings

For a briefing, you only need contributions, from those present, at the end of the session.

If there are a lot of strong opinions, you may ask those present if they want them fed back to the management. You must never attach names to these comments as you will lose the confidence of your team and they will be unwilling to contribute in the future. If the team does want points fed back, then make a list of them.

Minutes and action

Minutes are the notes which are circulated after a meeting, to remind people of the main points discussed and actions arising.

Informal meetings only require a list of main points and things to be done, as set out in the example above. Formal meetings sometimes require more detailed minutes e.g. threads of discussion.

For the purpose of your role as leader of a meeting, you need only worry about the short, action-type minutes. You will need to tidy them up and perhaps expand on one or two points in your notes. Wordprocess them in the same format as above.

Guidelines on writing minutes

- Write up while still fresh in your mind
- Select the main points
- Be brief and clear
- Use the same order as the agenda
- Use three columns:

Item	Action	By whom/when
------	--------	--------------
- Check with the speaker if you are unsure about any particular point
- Circulate the minutes as soon as possible after the meeting.

Mini Project

You will find the feedback to this mini project on page 22.

If you already lead team meetings or briefings, go through the whole process, following the techniques outlined in this booklet.

If you do not have the opportunity to do this, ask your supervisor if you can do the preparation, e.g. prepare the agenda or write the briefing note, for your next team meeting or briefing. Also ask your supervisor if you can take notes and write up the minutes for the meeting.

Activity 7

Sadie attended a home care team meeting. She was asked to take notes and write up the minutes.

This is as far as she got:

Jenny and the other team members said they were not going to 77 Acacia Avenue anymore because there is a ferocious dog. Bob said he would investigate. The Christmas break is from 2? December.

Marcus is home carer for the new client, 26 London Road, Pevensey.

The team Christmas dinner is on 21 December 12 noon at Dorritos?

You will find the feedback to this activity on page 23.

On a separate sheet of paper re-write the minutes in a clearer format.

FeedBack toActivities

FEEDBACK TO ACTIVITY 1

You have probably attended day-to-day progress meetings and briefings on particular aspects of your work. It helps if the leader takes time beforehand to think about the meeting or briefing and what it should achieve. This saves wasting people's time and discussions going off at tangents.

Brief written notes sometimes help, especially if people are being asked to understand numbers. Don't give people a lot of paperwork because they will not read it.

FEEDBACK TO ACTIVITY 2

For the agenda, check that you have included: the date, time and venue of the meeting, put 'Agenda' at the top of the page, numbered and listed the items on the agenda.

For a briefing note check that you have included: the date of the briefing, the topic(s), listed the main points of the briefing, given the information headings for easy reading.

FEEDBACK TO ACTIVITY 3

At the start of a meeting you will:

- introduce yourself and the people present
- circulate the agenda if this has not been done before
- explain the purpose of the meeting if it is not a regular meeting
- go through the minutes or action points of the last meeting
- remind people of the finishing time.

At the start of a briefing you will:

- introduce yourself and others present if people do not know each other
- introduce the topic and give some brief background information
- explain the purpose of the briefing
- remind people of the finishing time
- remind people that they will be able to comment and ask questions at the end of the briefing.

FEEDBACK TO ACTIVITY 4

Ask a supervisor or colleague for feedback on these skills after leading your first meeting or briefing. Remember skills such as these take time and practice to develop.

A good way to develop these skills is to observe more experienced people leading briefings or meetings. Ask your supervisor if this is possible.

FEEDBACK TO ACTIVITY 5

Clearly, there is no point in Abdul continuing the briefing as planned, because people will not be taking in what he is saying.

It is best to stop there and ask people what their concerns are about the system and what they would have liked to have seen instead. List the concerns and issues on a flip chart if one is available. If the concerns clearly aren't true, e.g. 'we'll have our basic pay cut,' explain that it is not true, there and then. For more complicated concerns, e.g. about how the system works, say that you will explain this once you move on to the briefing.

Once you feel that you have got the concerns out in the open, you can start your briefing. Remember that people are concerned, so be sensitive to this. This is one occasion when you might have to run over time, if necessary.

FEEDBACK TO ACTIVITY 6

You cannot allow individual disputes to continue because it means that the meeting is out of control. Say loudly 'would both of you stop talking please' and look at them. Repeat again if it doesn't work the first time. If this still doesn't work, walk over to them and say that you want to continue with the meeting.

Continue with the same topic and ask non-argumentative people what they thought happened. Steer the conversation away from fault finding to what actually happened.

If there are still some disagreements, in your summary at the end of the item, point out the areas of agreement and disagreement.

FEEDBACK TO MINI PROJECT

With your supervisor or a colleague who attended the meeting, look at your minutes and see how far they meet each of the following criteria:

- written up while still fresh in your mind
- main points and actions recorded
- brief and clear style
- the same order as the agenda used

- used three columns:
item action by whom/when
- minutes circulated soon after the meeting.

FEEDBACK TO ACTIVITY 7

Home Carers' Team Meeting Monday 10 December 20XX,

At 10 a.m.

Minutes

Item	Action or main point	by whom/when
1.	The team members refused to visit 77 Acacia Avenue because of the ferocious dog. An investigation is to be carried out.	Bob 3/1/20XX
2.	The Christmas break for the team starts 24/12 and we are back on 3/1.	
3.	Marcus is the home carer for the client at 26 London Road, Pevensey. Marcus is to get the client details from the Supervisor.	Marcus 13/12/20XX
4.	The team Christmas dinner is at Dorritos, 56 High Street, to be there 12 noon on 21 December	All 21/12/20XX

Do you:

Feel that you know what steps you should take to prepare for team meetings?

Get anxious when you are asked to run a meeting?

Worry that your meeting will be difficult to control?

Check that your meeting has achieved its purpose?

If you answered 'Yes' to one or more of these questions, you will find that the activities and suggestions in this booklet will help you with the following:

- ensuring that you have prepared for your meeting and know your role as leader
- provide you with strategies to cope with difficult situations
- writing minutes and agenda.



INVESTOR IN PEOPLE

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INVESTOR IN PEOPLE

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The Campaign for Learning is a national charity seeking to create an appetite for learning in everyone. Its four areas of work are Workplace Learning & Skills, Family Learning, Learning to Learn and influencing policy. It co-ordinates Learning at Work Day and a Family Learning Festival each year. The Campaign is supported by the government, a wide range of businesses, local authorities, voluntary sector organisations and individuals.

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