



UNIT-5

Organising Meetings

Learning Outcomes

By the end of this unit the learner will be able to:

Unit 5

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Meetings

The Anatomy of a Meeting

Meetings play an important role at the heart of most successful businesses. An effective and well-planned meeting has the potential to benefit the business and its employees in limitless ways. However, meetings always require careful planning, coordination and general organisation. All of which can be challenging and time consuming.

Working as an administrative assistant, it is likely that you will handle the majority of the logistics that go into meeting management and organisation. Typical duties may include selecting and reserving an appropriate venue, determining a convenient time for the meeting, sending invitations and so on. Depending on the nature of the meeting, you may also be required to organise refreshments, perhaps even catering or transportation.

Some meetings are scheduled on a weekly or monthly basis, while others are organised as and when circumstances demand. Even when meetings are regularly scheduled, it may still be necessary to send invitations, reminders and general information about the meeting to those who will be attending. Details of the agenda will usually be provided for every attendee, along with a schedule for the meeting and the extent to which anything should be prepared by the delegate. For example, if they need to bring anything with them to the meeting - paper, pens etc.

It is not uncommon for meetings to be called with little to no notice whatsoever. Without a moment's hesitation, the administrative assistant must be able to put plans in place to organise a meeting at the very last moment. This may mean contacting attendees directly by telephone or meeting them in person, rather than issuing written invitations in the usual way

Important Corporate Meetings

All businesses have their own unique requirements and objectives when organising and hosting meetings. Many businesses hold annual meetings of stockholders, during which new directors may be elected. There may also be other occasions during the year where meetings with stockholders are necessary, in order to inform them of important developments or to gain their consent for important business decisions.

Annual stockholder meetings have special legal requirements for which meeting notices must be sent. Printed notices are sent along with proxy voting forms and a return-address, postage-paid envelope. As an administrative assistant, your duties include preparing notices of the meeting as well as a proxy form to be used in case a stockholder cannot attend.

When a proxy is elected, they are able to act and vote on behalf of the stockholder. More often than

not, all notices and proxy authorisations are organised around 3 to 4 weeks before the date of the meeting.

If you are responsible for organising any important corporate meetings, you will need to be highly strategic with the date, time and location of the meeting. You may also be appointed the official recorder of the meeting (aka taking the minutes of the meeting), which will mean sitting in on the meeting and taking comprehensive notes of everything that is said and everything that takes place. This may or may not fall within your duties as an administrative assistant - your boss will determine your involvement or otherwise.

However, it will *always* be your job to keep a careful record of everyone you contacted ahead of the meeting, the date and time you contacted them, whether they have responded and the nature of their response, any questions or concerns raised along the way and so on. All such information should be documented in a formal manner, in case it is needed at a later date.

For obvious reasons, important corporate meetings that take place away from your company's premises can be even more complex to organise. If you are not already familiar with any given venue, it may be your responsibility to visit it in person and assess its suitability. You may also need to research local public transport options for attendees, organise hotel bookings and generally oversee the wellbeing of everyone invited to the event. Again, this will vary in accordance with the requirements of your business and the type of meeting being organized.

Scheduling Meetings

The complexities of effectively scheduling meetings often take new administrative assistants by surprise. These days, computer technology and the internet have (to some extent) simplified the process of organising and finalising the details of most types of business meetings. Some of the most popular software packages used by businesses worldwide - such as Microsoft Outlook - can automate much of the process of scheduling meetings. As a result, the paperwork and logistics involved in scheduling meetings have both been reduced significantly.

However, this doesn't mean that scheduling meetings is necessarily as easy as it appears on the surface. The reason being that it isn't all about logistics and physical organisation - it also involves a great deal of your own personal judgment. The goal is, of course, to come up with a date and time that is suitable for everyone. Unfortunately, clashes and conflicting preferences are usually inevitable. As such, you may find yourself in a position where you need to consider the 'pecking order'. If one of the most important attendees' preferences clash with those of a lower-level delegate, you may choose to focus on the preferences of the former.

Every attendee is important, but it is also true to say that some attendees are *more* important than others. You can always consult with your boss if you are concerned about scheduling issues, but it will usually be up to you to come up with a plan that suits as many attendees as possible.

Common Problems When Scheduling Meetings

The most effective way to avoid issues when scheduling meetings is to predict and pre-empt them. With this in mind, what follows is a brief overview of some of the most common problems encountered when scheduling meetings:

- All plans for the meeting are in place, though you then find out that some of the most important attendees can no longer make it. As a result, you may need to cancel the meeting, come up with an entirely new date and start again from scratch.
- During the planning process, it is not uncommon to struggle with conflicting schedules, preferences and availability. To such an extent that it may be almost impossible to find a time that suits all, or even most of the delegates you intend to invite.
- You may find from time to time that the meeting location you booked suddenly becomes unavailable, before the meeting takes place. When this happens, you will be required to find another suitable venue, organise the reservation and ensure everybody knows about the venue change.
- In any instance where details of a meeting are changed more than once, it is likely any number of candidates will be confused as to what is happening and where. Your job being to ensure every delegate knows exactly what's happening.
- Automated software can simplify much of the process of organising meetings, but is also far from a flawless solution. Errors, bugs and data security issues can creep into the equation with any Internet-based meeting-scheduling tool at any time.
- Several important delegates fail to reply to your invitations. Even though you are 99.9% sure they will attend, you still need to obtain formal confirmation of this, and must therefore chase them up.
- There is no appropriate venue available in a location that is convenient for all delegates. You will therefore need to come up with the next best solution and perhaps organise transportation for some delegates.
- Insufficient information is provided in the invitations issued, which leads to various delegates turning up with no real idea what the meeting is about.
- Delegates who confirmed their attendance initially are not issued with a reminder closer to the date, resulting in a number of delegates forgetting that the meeting is taking place entirely.

Meeting Agendas

A meeting agenda is essentially a roadmap or schedule for what takes place during the meeting. It tells delegates what's going to happen, when it's going to happen and where the meeting takes place. Every meeting agenda should therefore include the following components:

- Meeting start time
- Meeting end time
- Meeting location
- Topic headings and details
- Speakers, guests and so on
- Transportation/accommodation information where relevant

Meeting Minutes

The 'minutes' of a meeting - referred to simply as meeting minutes - are a detailed record of everything that happened during the course of the event. The minutes of a meeting will usually be taken by an appointed individual from the organisation responsible for the event - in some instances the administrative assistant. For obvious reasons, meeting minutes must be as accurate, detailed and clear as possible, for the benefit of those provided with a copy after the meeting.

One of the easiest ways of ensuring no detail is overlooked is to take an audio or video recording of the meeting its entirety. This can then be used to quickly and easily provide a transcript of all speeches and discussions that took place. It's possible to take the minutes of a meeting in real-time (handwritten or typed), but this can make it difficult to note every important point - particularly where meetings are more challenging, complex or lengthy. Whatever your preferred approach to taking the minutes of the meeting, you should ensure that the final document details the nature and purpose of the meeting, the company name and address, the date and time of the meeting, who organized the event, the main topics of discussion, the time the meeting started and the time of adjournment.

Maintaining an accurate record of those who attended the meeting is also important. The easiest option being to simply pass an attendance sheet around the audience for everyone to sign, or to appoint an individual to tick each candidate off an attendance list as they enter the room. If you allocate specific seating to each individual attendee, you'll be able to see who didn't attend the meeting by way of their empty seat.

It's always good to have some kind of template to work with, when taking the minutes of a meeting. As you gain experience, this will make it quick and easy for you to provide an accurate and complete transcription, irrespective of the complexity of the meeting. Use the following outline as a guide:

- Name of organization
- Name of body conducting meeting
- Date, hour, and location of meeting
- List of those present and those absent
- Reading of previous minutes and their approval or amendment
- Unfinished business
- New business
- Date of next meeting
- Time of adjournment
- Signature of recorder

Contrary to popular belief, it isn't strictly necessary to record *every* single word spoken during the meeting. There may be sentences, paragraphs or entire sections of the transcription that are of no real value or relevance whatsoever. Your job is to capture the essence and meaning of what takes place during the meeting, rather than quoting each and every spoken point verbatim. If you know you will be taking the minutes of a meeting ahead of time, it can be helpful to familiarise yourself with the topics and conversation points that will be raised as comprehensively as possible.

General Office Meetings

There may be instances where you are not specifically instructed to take the minutes of a meeting. Assuming it is a relatively casual general workplace meeting, you may not be asked to take minutes in the usual formal way. However, it is always a good idea (for your own reference and records) to have a detailed record of everything that took place during the meeting. Again, just in case the information is needed at a later date.

Conferences

Organising a conference is largely the same as organising a meeting, though perhaps on a somewhat larger scale. More often than not, booking a conference means issuing invitations to more delegates across a wider area, booking significantly larger venues and taking responsibility for more complex logistics.

Some of the most important responsibilities in organizing conferences include the following:

- Determining appropriate locations for the conference
- Visiting venues in person and carrying out inspections
- Determining strategic dates and times to suit attendees
- Making travel and accommodation arrangements, often in bulk
- Evaluating available catering services
- Considering venue layout and decorations where appropriate
- Reaching out to key speakers and important attendees
- Producing and publishing marketing materials for the event
- Answering delegates' questions and providing local area information

Again, all of the above will vary significantly from one business and event type to the next. Nevertheless, it can be useful to familiarise yourself with as many different types of business events and conferences as possible, as you may be called upon to organise one at any time.

Preparing Conference Materials and Resources

In the run up to the conference, it will be your responsibility to confirm all materials and resources are in place for the event. This means everything from tables and chairs to projectors to video screens to financial statements to reports to marketing materials and so on. Where particularly large or important conferences are concerned, you will usually work as part of an event management team, rather than making all of the arrangements single-handedly.

Your employer will specify which responsibilities fall with you. In some instances, you may be called upon to make additional arrangements for key delegates, which go beyond the conference itself. Examples of which may include restaurant reservations, airport transfers, tickets to sporting events, guided tours/excursions and so on.

Organising catering and/or refreshments for a conference means being mindful of any important

dietary preferences or restrictions of those who will be attending. The most obvious example of which being to ensure that sufficient vegetarian and/or vegan options are provided, along with meals to suit attendees who are unable to eat certain foods for religious reasons. Your invitations to the event should also specify that anyone with a food allergy should indicate this clearly on their reply. All such information must be used to organise appropriate catering and refreshment services ahead of time.

You may be required to determine the extent to which audio-visual equipment is needed for the conference. Examples of which may include laptop computers, overhead projectors, microphones, PA systems, monitors and so on. Most meeting and conference venues will already have their own contingency of AV equipment, but you will still need to assess whether or not it is adequate for your requirements. If not, you may need to involve third party service providers to obtain the equipment you need for the event.

In the event that any guests are attending a conference from overseas, you may need to organise interpreters/translators. Not to mention, ensure their requirements are adequately covered, in terms of transportation, accommodation and so on. If they do not have a good grasp of the local language, they may need to be provided with a local assistant/representative from their moment of arrival.

Approximately two weeks prior to the conference, it's important to go over every detail once again. Ensure all materials and resources are ready, issue reminders to attendees and get in touch with local media outlets to publicise your event. This is also the time to carefully consider the general safety, security and accessibility of the venue. Will it be necessary to hire dedicated security guards, or is the security of the facility sufficient as it is?

Once again, you needn't worry about the prospect of being expected to organise *every* aspect of a major conference single-handedly. Event managers and specialist agencies are often hired to take care of most key responsibilities. However, there's every chance you'll be asked to handle at least some of the more important arrangements. In which case, it pays to familiarise yourself with as many conference planning responsibilities as possible.

During the Conference

When the conference gets underway, you'll be expected to play a role in ensuring everything runs smoothly and that every delegate in attendance is happy with the experience. This will mean taking note of things like temperatures, lighting, availability of refreshments and even cleanliness of meeting rooms and bathroom facilities.

You may be appointed the official greeter for your organisation, which will mean personally welcoming every delegate to the conference upon entering the room. You may also need to escort delegates to their seats, let them know where to find the various facilities within the venue and generally answer their questions about the conference.

As always, you will need to ensure that a record is kept of the important points raised and discussions that took place during the meeting. Maintaining a written account of *everything* could prove impossible, so it's again a case of ensuring the event is captured in full by way of an audio or video recording. You can then use this recording after the conference to produce a concise yet comprehensive account.

After the Conference

Organising a conference falls within the bracket of event planning and event management. One of the most important elements in the event management cycle is collecting feedback and suggestions from those in attendance. There is no such thing as a *flawless* conference - there is always room for improvement. Collecting feedback being the very best way of finding out how things can be improved the next time around.

It is unlikely you will be personally responsible for cleaning and tidying the venue after the event. However, you may need to dismantle and remove the audio-visual equipment you hired, readying it for collection by the rental company. If any lost property is found after the event, it should be handed to the front desk at the venue - not taken back to your business with you.

After every conference, it is prudent and professional to send a thank you letter to each and every important delegate. This can also be a great opportunity to ask them to share their thoughts and opinions on the conference as a whole. You may or may not need to complete an expense report - your employer will advise accordingly.

Last but not least, it's always a good idea to produce your own feedback document after the event. Write down what you think went well, what could have been improved and any challenges you faced along the way. Make a note of any improvements you feel could benefit future events and send a copy of your report to your boss. Better yet, make an appointment to discuss your findings with him or her at a convenient date and time.

Conference Notes

Where a conference brings people together from a variety of different businesses, localities and backgrounds, it's important to maintain a note of who says what. Assuming the conference allows questioning and participation from the audience, it can be useful to ensure each participant clearly states their name and the company they represent, prior to asking their questions or raising points for discussion.

This can then be used alongside your detailed delegate records to determine who was speaking, and include information as necessary in your subsequent conference notes. Make it as clear as possible in your conference notes as to who was speaking and who they were speaking to.

Further Reading: