

TIDEE

Transferable Integrated Design Engineering Education



Communication

Section 3: Meetings

This section includes:

- **Planning and Documenting Meetings**
- **Planning Initial Client Meeting**
- **Planning Client Design Review**
- **[IR] Providing Feedback on Meetings**

Meetings can be opportunities to exchange vital information with clients and team members. This section provides activities that chart a course for productive meetings.

The first activity, *Planning and Documenting Meetings*, brings your team together to clearly define the objectives of a meeting as well as expected conduct and required documentation that must be generated to facilitate a successful meeting.

The second activity, *Planning the Initial Client Meeting*, focuses on the roles team members will hold in establishing trust with the customer. Each group member has specific areas of responsibility and is charged with contributing their expertise at the appropriate time.

Planning the Client Design Review can serve as an adjunct to the previous activity. The Design Review is typically a meeting of critical importance. In fact, project approval often relies on the team's ability to convince the customer that continued support and dedication of resources will benefit the client. This activity helps you think through client expectations, so that you are prepared to clearly articulate project achievements.

The last component is an Instructor Resource that will aid faculty in providing constructive feedback to students regarding the skill and processes required for effective meetings.

Activity: Planning and Documenting Meetings

Meetings of design teams (or subteams) bring people together for focused discussion, decisions, and other actions to advance a design project. Successful meetings rely upon clearly defined objectives, effective conduct of business, and adequate documentation of outcomes. In this activity, you will discuss purposes and mechanics of meetings and establish procedures to ensure the successful completion and documentation of your meetings.

Objective: Develop procedures for conducting and documenting outcomes of meetings in support of design project success.

Tasks

1. Assign team members roles to support this activity.
2. As a team, list attributes of meetings that you find unattractive and those that are attractive or enjoyable. Record your thoughts on the Meeting Planning worksheet.
3. Identify the functions of documentation for meetings. Consider the purposes of documents prepared before a meeting, during a meeting, and after a meeting. List these on the worksheet.
4. Identify elements of a good meeting agenda. Consider content, availability, relevance, etc.
5. Identify criteria for high quality meeting minutes. Consider issues affecting both immediate and archival value and their availability. Record information on the worksheet.

Deliverables

1. Team Reporter presents:
 - a) A list of agenda elements and their importance
 - b) A list of criteria for meeting minutes
2. Team Reflector reports:
 - a) An improvement to team Recorder notes suggested by this activity
 - b) An insight gained from this activity
3. Team homework (due in next class):
 - a) A template for future meeting agendas, with guidelines for their preparation and distribution
 - b) A template for meeting minutes, with guidelines for their distribution and storage

Criteria for Success

- Meeting agendas and their handling support effective, efficient meetings.
- Criteria for meeting minutes address content, timeliness, availability, value to project.
- Meeting minute templates provide a structure for documenting meeting achievements, supporting learning, and formalizing responsibilities.
- Team members evidence increased understanding of purposes and processes for effective meetings.

Resources

- Personal experience with meetings
- Worksheet: Meeting Planning
- 20 minutes of team discussion time

Worksheet: Meeting Planning

Attributes of Poor and Good Meetings

Unattractive Meeting Attributes

Attractive/Enjoyable Meeting Attributes

Functions of Meeting Documentation

Before Meeting

During Meeting

After Meeting

Elements of a Good Meeting Agenda

Criteria for Meeting Minutes

Activity: Planning the Initial Client Meeting

Client satisfaction is crucial to every engineering design project. This requires that client needs and desires are understood and that communication and trust are established with the client early in the project. These are often best achieved by face-to-face meetings between the design team and the primary client(s). In this activity, you will identify vital issues to be discussed with your project client and create a plan for your first client meeting.

Objective: Develop a plan for your design team's first meeting with the project client(s) to obtain key information and establish supportive relationships.

Tasks

1. Assign team members roles to support this activity.
2. As a team, list the roles you see your project client(s) playing in your project. What is the importance of each role to the success of the project? What risks are associated with the role? Record your thoughts on the Project Client Roles worksheet.
3. Identify objectives for your first client meeting. Typically, you will need to achieve objectives related to your client relationships and others focused on understanding your design project. List and prioritize your objectives on the Client Meeting worksheet.
4. Identify elements of your client meeting that will achieve your stated objectives. Determine roles of team members and time allocations to ensure that priority objectives are achieved.

Deliverables

1. Team Reporter presents:
 - a) A list of your team's prioritized objectives for your first client meeting
 - b) A tentative agenda for ensuring success of your client meeting
2. Team Reflector reports:
 - a) An example of creative problem solving observed in this activity
 - b) An insight gained from this activity
3. Team homework (due in next class):
 - a) An agenda for your first client meeting, with times and responsible persons identified, to optimize achievement of your meeting objectives
 - b) A draft of any handout materials or data sheets to be used in the client meeting

Criteria for Success

- Teams identify important, specific objectives for building client relationships and obtaining vital information for the project.
- Teams create an agenda that creatively and effectively achieve the most important objectives for the first client meeting.
- Teams accept and meet the challenge of creating an effective client meeting.

Resources

- Personal experience in design projects and client relationships
- Worksheet: Project Client Roles
- Worksheet: Client Meeting
- 15 minutes of team discussion time

Worksheet: Project Client Roles

<u>Role</u>	<u>Importance</u>	<u>Risks</u>
Ex.: <i>Provide user perspective</i>	<i>Needed to make design satisfy actual user needs</i>	<i>Client not available or willing to provide information when needed</i>
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

Worksheet: Client Meeting

Meeting Objective

Priority

Meeting Element

Time

Responsible

Activity: Planning the Client Design Review

Crucial project decision points occur during design reviews with clients. Here key decisions are made regarding project continuation, funding, and endorsement. In design reviews, teams must present credible evidence for success and motivate clients to commit resources critical to design efforts. In this activity, you will develop plans for a design review that communicates project achievements and gains client support appropriate for the stage of your design project.

Objective: Establish a plan for a team design review with project clients, one that achieves outcomes vital to the stage of the design project.

Tasks

1. Assign team members to roles that support this activity.
2. As a team, identify meeting objectives crucial to the stage of your project. These may include information exchange, gaining commitments, establishing credibility, etc. Prioritize your objectives on the Design Review Planning worksheet.
3. List specific meeting agenda items needed to achieve your primary objectives and the time needed per item.
4. Identify other planning details that can affect the execution of the meeting and the predisposition of participants. Record these on your worksheet.

Deliverables

1. The team Reporter presents objectives for the design review and meeting details that will support their achievement.
2. The team Reflector presents:
 - a) One strength of the team in this activity
 - b) One area for team improvement
 - c) An insight you gained personally from this activity
3. Team homework (due next class): A packet of material, including cover letter, meeting agenda, and supporting materials, to be sent to clients prior to the design review.

Criteria for Success

- Teams are able to define a meeting to achieve important objectives of a design review.
- Teams prepare a professional quality packet of materials to support a design review meeting.
- The team Reflector is able to give useful feedback to improve team efforts.

Resources

- Experiences with the design project and client relationships
- Worksheet: Design Review Planning
- 15 minutes of team discussion time

Worksheet: Design Review Planning

Design Review Objectives
Meeting Objectives

Priority

Agenda
Agenda Item

Time

Meeting Arrangements

Location: _____

Time: _____

Facilities issues:

[IR]: Providing Feedback on Meetings

Meetings, due to their varied settings, purposes, and participants, are subject to many influences that challenge their effectiveness. Receiving constructive feedback on meeting effectiveness can enable design teams to improve their skills and processes for conducting effective meetings. In these materials, you will explore tools for providing design teams valuable feedback for improving their meetings.

Objective: Identify tools for providing students useful feedback on their conducting of team and client meetings.

Tasks

1. Identify criteria for an effective meeting:
 - a) Content: Goals clear, priority topics addressed, adequate time allocated to priority topics
 - b) Participation: People contributed as appropriate; efficient and orderly contributions
 - c) Information: Information managed effectively to support meeting and follow-up
 - d) Climate: Respectful climate, draws engagement, enhances relationships
 - e) Outcomes: Key decisions achieved, action items and responsibilities defined
2. Define what is a reasonable set of feedback (from giver and receiver perspectives):
 - a) Overall perspective on meeting quality and individual contribution
 - b) Strengths observed and ways to use these for the benefit of yourself and others
 - c) Improvements needed and how to achieve them
3. Adopt a standard format that makes your feedback effort efficient and provides students valuable information. Begin by reviewing the Example Meeting Feedback handout (attached) and determining its strengths and areas needing refinement to meet your needs. .

Deliverables

1. Create a Meeting Feedback Form to fit your needs.
2. Begin using your feedback form to give students valuable feedback on meetings.
3. Identify an insight you gained from this process of preparing to give feedback on meetings.

Criteria for Success

- You identify what is most important as feedback to students regarding their meetings.
- You establish an efficient but effective tool for providing feedback on meetings.
- You learn from your preparation efforts.

Resources

- Your experience with meetings and student concerns
- Handout: Example Meeting Feedback

Handout: Example Meeting Feedback

The following is feedback provided to a student following a team meeting with client.

Feedback on Client Meeting

Name:

Meeting Date:

Meeting Location:

Overall Meeting Quality Ratings

Attribute of Meeting	Max Pts	Points
Meeting agenda focused on achieving objectives	2	2
Attendees participated to support objectives	2	1
Information exchanged to support objectives	2	2
Meeting climate supported relationships, success	1	1
Decisions, learning achieved; follow-up action defined	3	3
Total	10	9

Comments:

Your meeting was conducted in a manner that demonstrated understanding of the client and your project needs.

Strengths:

The meeting focused on clear objectives and addressed them well. You gave proper attention to gaining your client's commitment to support the project. This will yield important benefits throughout the year as you find needs for client help. Note how bringing issues to points of decision and commitment can also be applicable in other aspects of this project and in strengthening your team.

Your team did a superb job of establishing a positive environment for the meeting. Taking initiative to welcome the client and provide suitable refreshments showed interest in the client and in providing an enjoyable meeting environment. I believe we witnessed benefits in the cordial interactions between your team and the client throughout the meeting.

Areas to Improve:

Not all of the team members participated actively in the meeting. This gave the impression that some were not knowledgeable about the project or not interested. If meeting responsibilities were divided among all team members, they would become more engaged and learn more about the project while also developing their meeting skills.