

Writing for Business

Lecture 12: Business Meetings; Virtual Meetings; Agenda and Minute Writing

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Learning Objectives

By the end of this lecture, you should be able to:

- a) Describe how to conduct business meetings, both physical and online
- b) Create a meeting agenda
- c) Take minutes during a meeting

1.0 Introduction

Welcome to Lecture 12! This is our last lecture and before we start, let's review what we learned last week. We looked at proposal writing and learned that a proposal is a document designed to persuasively appeal to the audience for a defined outcome, often proposing a solution to a problem. We also learned of the types of proposals, that is internal and external. Internal proposals can be formal or informal (routine). External proposals can be solicited or unsolicited. Other types of proposals include grant, research and sales proposals. Persuasion, which includes ethos, pathos and logos, is key to effective proposal writing. The elements that make up a proposal include a title page, executive summary, background, proposal, market analysis, benefits, timelines, marketing plan, finance and conclusion. We also learned about business plans, elements of a business plan and why some business plans fail.

1.1 Business Meetings

Businesses cannot operate without meetings because it is in meetings where issues, agendas and other things are discussed for decision making, realizing an outcome, planning a function, etc. Meetings provide opportunities for sharing information, immediate feedback, and making suggestions. In short, there are many reasons for holding meetings. Adler & Elmhorst (2011, p. 272) call meetings 'a fact of life.' The authors report that 11-20 million meetings occur in America daily and that meetings are costly both in resources and time. Additionally, the authors demonstrate that not all meetings are productive and according to one survey, employees think a third of the meetings are not necessary and are poorly conducted. However, meetings are useful and Taylor (2005) lists the following purposes they serve:

- a) To give information to a group of people
- b) To obtain assistance
- c) To create involvement and interest
- d) To put forward ideas or grievances for discussion
- e) To report on some activity or experience
- f) To coordinate or arrange activities

1.2 Types of Meetings

Adler & Elmhurst (2011) suggest three categories of meetings: Information-sharing meetings; Problem-solving meetings and ritual activities.

Information-sharing meetings: Let me give you two examples of meetings where information is shared. One is a news organization where an editorial meeting is held to share information on what was gathered about the next day's publication or news bulletin later in the day. Secondly, a company with many branches nationally or internationally can schedule weekly virtual meetings to keep all the workers up-to-date.

Problem-solving or decision-making meetings: An example I can give you concerns a high school teachers' meeting where the teacher-on-duty shares the information that she gathered for decision-making. It could be that the students are planning something sinister. The task is to prevent the occurrence of whatever is being planned. One of the outcomes of this meeting is that the teachers can decide to close the school indefinitely until investigations are complete. Adler & Elmhurst (2011) identify problem-solving meetings as the most common in businesses.

Ritual activities: Adler & Elmhurst (2011) opine that these meetings (often called progress review meetings) are social in nature and can even take place in a local bar. Even though the meeting environment may not appear businesslike, the authors state that such meetings are important for several reasons: to reaffirm members' commitment to the company and to one another; it's a forum to share ideas and information that might appear inappropriate at work; and it is sort of a perk that confers status on members.

Taylor (2005) classifies them as formal and informal meetings.

1.2.1 Formal meetings

According to Taylor (2005), these meetings occur according to the laid-down company policies (Article of Association, Constitution, Standing Orders, etc). Before these meetings are held, there must be a quorum and the secretary is the officer designated by law to take minutes. Types of formal meetings include:

Annual general meetings: These are held annually to assess company operations in the last year. Shareholders must receive a 21-day notice ahead of the meeting.

Statutory meetings: These meetings (required by law) enable directors and shareholders to communicate and consider special reports.

Board meetings: These meetings (chaired by the Board Chairman and attended by all directors) are held as often as required.

1.2.2 Informal meetings

Informal meetings do not follow strict laid-down regulations as formal meetings and include the following:

Management meetings: As the name suggests, this is a meeting by managers who gather to discuss specific issues, solve problems, receive and comment on progress reports, etc.

Departmental meetings: These meetings, chaired by the head of department, occur at the departmental level.

Working parties: Involves teams that work on a specific project or problem.

Andrews and Andrews (1988) classify them as regular and specialized. Regular meetings help to monitor the work environment, keep people informed and detect problems early enough. For example, departments that are required to meet weekly.

1.2.3 Virtual meetings

Advancements in technology have enabled virtual meetings which are becoming normal across organizations. These meetings can occur via teleconference or videoconference. Adler and Elmhurst (2011) state that the convener dials the first participant in a teleconference, taps the hang-up button, then calls the rest of the members. Once everyone is on board, the convener sends another signal which allows for conversations to begin. With videoconferencing, participants can see one another as they engage. Today, there exist a variety of videoconferencing facilities one can subscribe to such as Zoom, Google Meet, Class for Teams, the Big Blue Button, Webex, etc. Adler and Elmhurst (2011) offer the following guidelines when attending teleconferences or videoconferences:

- a) Send all documentation that will be discussed to all participants before the meeting
- b) Participants to introduce themselves and their locations at the start of the meeting
- c) Participants to identify themselves in telephone conversations to avoid confusion
- d) No interruptions or leaving out certain participants when it comes to participation
- e) Ensure minimum distractions e.g. silence your phone
- f) Use the best equipment

Learnlight (2018) offers the following tips for a virtual meeting:

1. Good organization: Have a group calendar; have a notification system; find a tool that works for you; structure your meetings
2. Focus on what's important: Set clear objectives
3. Adopt a mandatory video-on policy: Mind non-verbal cues
4. Acknowledge all in the call
5. Share the mic
6. Don't allow disrespect
7. Keep meetings short
8. Agree on the next steps

As one who frequently conducts classes via videoconferencing, let me add that it's important for all the participants to mute their microphones to avoid distractions. I have also developed the habit of randomly assigning duties or asking questions while the class is ongoing to keep everybody alert. Additionally, I take roll call randomly- you will not know when I will do this. The random

roll call ensures that the participants do not log in only to disappear to other duties. You are free to find ways that work for you- to ensure everybody is actively listening or contributing.

When attending meetings (physical or virtual) it's important to be involved. For instance, read the agenda of the meeting and other documents in advance and start preparing. During the meeting, try to contribute to the discussions and do not interrupt the speaker. You need to employ good listening skills during the meeting. Also, avoid distractions such as phones (which you can switch off or silence), unnecessary movement, talking to a neighbor while the meeting is ongoing, etc. Lastly, keep time to avoid a meeting being postponed for lack of quorum.

1.3 Agenda

An agenda refers to a list of matters to be discussed in a meeting. Adler and Elmshorst (2011) state that a meeting without an agenda is like a ship at sea without a destination or compass. The purpose of agenda writing is to outline the main ideas of the meeting as well as assign responsibilities and deadlines to be discussed. An agenda is often driven by the needs of the company or meeting and will contain the following items:

- Date, time and location
- List of attendees
- Goal of the meeting
- Background information
- The person/group that has called the meeting
- Items to be discussed (include, but not limited to roll call, approval of previous minutes, matters arising, the business of the day- which can be a list of items to be discussed-, and adjournment)

Sample Agenda

Date: 28th November 2024

Time: 9am

Location: LR 4B

Meeting convener: Mr. Mark Kibwana- CEO

Attendees: All Employees

- **Call to order**
 - a) Welcome and introductions
 - b) Review of agenda and meeting objectives
- **Recording of attendance**
- **Confirmation of previous minutes**
 - a) Reading of previous minutes
 - b) Confirmation of minutes
- **Matters arising**
 - a) Discussion of unfinished business
 - b) Amendments if any
- **Employee issues**
 - a) Presentation of current status regarding employees

- b) Discussion of employee issues
 - **Project updates**
- a) Reviewing current projects
- b) Discussing milestones or challenges
 - **New branch**
- a) Presentation of the new branch
- b) Q & A session
 - **Open forum**
- a) Any other pertinent business
 - **Closing & adjournment**
- a) Summary of key takeaways
- b) Next meeting date
- c) Adjournment

1.4 Conducting a meeting

- Begin and end on time
- Have an effective opening to set the tone and mood of the meeting
- Explain why the group is meeting (goals) and how the meeting will run
- Give background information
- Ensure members participate and give each member an equal chance. You can use questions to draw listeners to participate
- Keep discussions on track
- Maintain a positive tone
- Conclude the meeting and close it when the scheduled time has arrived and when the agenda has been covered. Provide a summary of what was discussed and acknowledge the group's contributions.

1.5 Follow Up

Always make a point to follow up so that people do not forget what was said. Some members may have taken away different interpretations, so a follow-up will help bring everybody to the same page. You can follow up by sending a memo or email summarizing the meeting's accomplishments and highlighting delegated tasks and responsibilities.

1.6 Minutes

Minutes are an official record of a meeting. In formal meetings as noted above, only the designated secretary or assistant secretary takes minutes. In other meetings, anyone can be appointed to take the minutes. The records indicate what was said during the meeting and what actions should be pursued. Minutes are important because they keep a record in case future reference is required. They also help to keep the members who could not attend informed.

1.6.1 Elements of Minutes

- Title that contains the group that is meeting and the date, place and time
- List of the members present, absent, and those who sent apologies
- The agenda of the current meeting for which minutes are being written
- Confirmation of previous minutes
- Matters arising from previous minutes (unfinished business)
- New business represented in various points/list of items to be discussed. The discussions include actions or tasks to be undertaken, the responsible people, decisions made by participants, main points, etc.

When tasked with recording minutes, be very careful to take accurate details. Hence, prepare before the meeting by ensuring you have a notebook and pen. Some people prefer to type directly on a laptop. If that is you then ensure you have a functioning laptop with enough charge. Take only the main points to avoid being overwhelmed and missing out on the meeting as a whole. After the meeting, clean up the minutes and send them out as soon as possible.

1.6.2 Writing of Minutes

- The minutes can be displayed in a variety of formats. Some companies have templates.
- Use the past tense since minutes are a record of what has taken place.
- Use the third person/reported speech.

1.6.3 Sample Minutes

MINUTES OF WATOTO CHILDREN'S MEETING HELD ON 12/11/2024 AT 4PM IN THE BOARDROOM

1.0 OPENING

The chairperson called the meeting to order at 4pm and introductions were made.

2.0 ADOPTION OF THE AGENDA

The following agenda was adopted without amendments: -

1. Recording of attendance
2. Confirmation of minutes
3. Matters arising
4. Departmental reports
5. Watoto Children Cultural Day
6. End-of-year party
7. Closing & adjournment

3.0 RECORDING OF ATTENDANCE

Members Present

1. Ms. Mary Mwadime- Chairperson

2. Mrs. Penina Juma
3. Mr. James Paul
4. Mr. Luke Omondi
5. Ms. Victoria Mweu
6. Ms. Janice Moraa
7. Mrs. Margaret Ekuru
8. Mr. Ian Wafula
9. Ms. Jane Victory
10. Ms. Juliana Awema- Recording secretary

Apologies

1. Mr. Rick Mwangi
2. Ms. Nancy Obatala

4.0 CONFIRMATION OF PREVIOUS MINUTES

- The minutes were read through by the secretary. They were proposed by Ms. Jane Victory and seconded by Ms. Janice Moraa as a true record.

5.0 MATTERS ARISING

Mr. Luke Omondi reported that the winners of the October 15th 2024 IT Competition had been contacted and will be attending the Watoto Children Cultural Day where they will be awarded.

6.0 DEPARTMENTAL REPORTS

- The Marketing Department reported that they had taken part in the recycling and tree planting activities organized by World Habitat Organization on 10th October 2024. The department was represented by three members, Mr. Luke Omondi, Ms. Nancy Obatala, and Mrs. Margaret Ekuru.
- The Research Department has published an article in PubMed titled, ‘Autistic Children and Climate Change: Case of Watoto Children.’ PubMed is a renowned open source database in the medical field.
- The Communication Department reported that they had held fruitful engagements with the Minister for Information, who has promised to visit the company in December for further discussion. Watoto Children is seeking to host a conference in 2025 in which the Minister is expected to give a keynote address.
- Other departments promised to have their reports ready by the next meeting.

7.0 WATOTO CHILDREN CULTURAL DAY

- This year’s cultural day will be held on 2nd December 2024.
- The following were appointed to the committee to begin planning for the day: Mr. Ian Wafula, Ms. Jane Victory, Mrs Penina Juma and Mr. James Paul.

- The Committee will come up with a proposed draft which should contain the proposed venue, activities, guests, food and refreshments, and any other.
- They will share the draft in the next meeting.

8.0 END-OF-YEAR PARTY

- The end-of-year party will be held on 23rd December 2024 at Ole Sereni Hotel from 7pm until guests leave at their pleasure.
- Those who will not attend the party for whatever reason should inform the administration by 20th November, 2024.
- The dress code is pink and black for ladies, and dark green and black for the gents.

9.0 CLOSING AND NEXT MEETING

- The chairperson brought the meeting to a close at 5pm. The next meeting will be held on 19th November 2024 at 4pm.

Approved for circulation by:-

CHAIRPERSON..... Date.....

SECRETARY..... Date.....

1.7 Summary

We learned about business meetings which are necessary for brainstorming, sharing ideas, decision-making, to report on an activity, coordinate some activities, etc. We also learned about the various types of meetings such as formal and informal meetings, regular and specialized meetings, and such other categorizations. Because of technological advancements, virtual meetings have gained prominence but there is a way to conduct them if we are to experience success. For instance, turning on cameras, muting mics unless speaking, etc. Before a meeting can take place, an agenda should have been shared among participants and during the meeting, minutes are taken to keep a record of the discussions and resolutions passed.

1.8 Activity

- a) Read the article about business meetings by the Harvard Business Review and make notes.
- b) In groups of 6, conduct a mock meeting where one of you will be the chair and another the secretary. The secretary will take minutes and type them out. The rest of the members will critique the minutes.

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