

AO Survival Guide Set-Up/Conduct a Meeting

1. Get the room first.

- a. See the AO Handbook, Staff Tools section, for a list of conference rooms if not using your building.
- b. Check for available, times, and dates early, then reserve it.
- c. Verify you still have the room the day before the meeting.
- d. Have a backup plan in case the General or owner of the room needs it back.
- e. Make sure it is appropriate in size, comfort, and has everything you need for your presentation (overhead projector, etc.)
- f. Remember Security if it's going to involve classified material - get your security manager involved early!
- g. Test audio visual equipment early. Review all audio visual presentations in the meeting area prior to meeting. Sometimes your formatted material may not match that of the equipment in the meeting room.
- h. Make max use of virtual meetings and the VTC.

2. Send out the email with accept/decline buttons or better yet, as an Outlook meeting invitation.

- a. Use outlook calendar to schedule your meeting; when you pick the attendee's you'll see what free time they have on their schedules to help you pick the right date/time. Some conference rooms are listed and can be reserved this way. Also, it is best if you are inviting O-6s to use the 3 digit office symbol.
- b. Make certain the email has your phone number for questions.
- c. Ensure all key offices will be represented.
- d. Call secretaries of O-6s and above and any other critical players to ensure they are attending and it is on their calendars. Send a reminder email to the 3 digit office symbol that morning. Nothing worse than a meeting without key people present.
- e. Get the proper names of all key participants and make name tags for the O-6 and higher personnel for those meetings that this is appropriate. AO Handbook has a protocol link that has seating arrangement guidance for senior officers.
- f. Don't have meetings at the end of the day or right before lunch. To many time constraints
- g. Not good to schedule a meetings at 1600 on Friday or before a holiday. You may not have very good attendance. If you do, really emphasize importance of meeting and the need for the key people to be there.
- h. Ensure attendees are notified in timely fashion when changes occur.

3. Provide read aheads and the agenda (critical if you have O-6 and above attending).

- a. Stick to the agenda.
- b. Don't overload with slides. Keep it as short and concise as possible. This will keep your meeting on tract and to the point.

- 4. Open the meeting with purpose, goals, and/or expectations, keep on track, and don't waste people's time.**
 - a. If someone gets off on a tangent, let them know it can be discussed offline after the meeting -- stay in charge.
 - b. Have a time keeper, helps you stick to a schedule.
 - c. **START ON TIME!** Don't wait for stragglers. You are wasting the time of those who were professional and courteous enough to arrive on time.
 - d. Don't let someone else take over the meeting to pursue their own agenda.
 - e. If you are the leader, be sure you have done your homework.
 - f. Acknowledge input from others and make them feel important.

- 5. Close meeting with quick wrap-up of decisions, guidance for follow-on or continuing work.**
 - a. This refreshes the memory and possibly jogs something they forgot to jot down.
 - b. Always end with a sense of accomplishment.
 - c. Track open actions and who will address them and when.

- 6. If minutes are in order, ensure they are complete and to everyone with 48 hours of meeting, sooner is better.**

- 7. Make sure you need to have a meeting.**
 - a. Ask the question, what will a meeting produce that an alternative will not?

- 8. Keep number of meetings to minimum.**
 - a. We are all already overbooked with a busy schedule, leave time for us to accomplish the tasks assigned out of the meeting.

- 9. Some meetings need to have a facilitator. If you don't know what one is...find out. It's different than a leader.**
 - a. Someone who doesn't have a stake in the fight, usually trained.
 - b. Helps bring things back on-line when they drift
 - c. Take any available course in facilitation techniques.

- 10. Plan for all the requirements of Command Section meetings/briefings: Pre-briefs, owl's list, read aheads, room, number of chairs in the room. Plan to go over in advance and practice using the equipment that will be used during the actual event.**