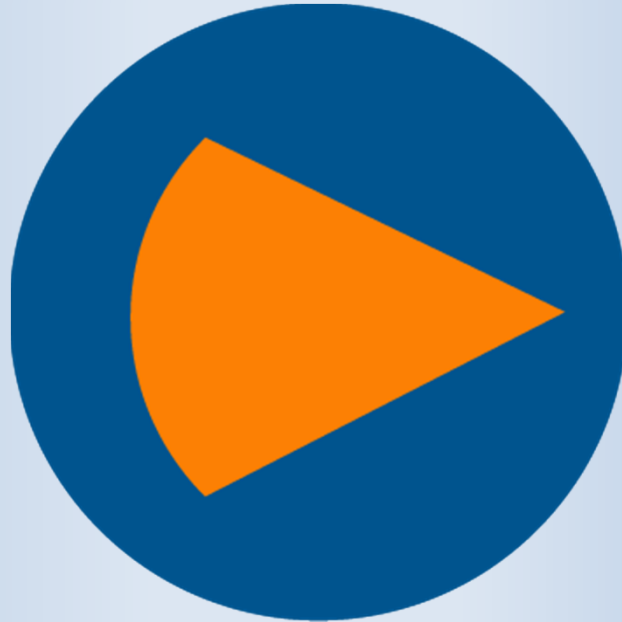# Advanced Project Management

Meeting Effectiveness

PROJECTinsight®

Project & Portfolio Management Software

Initiate Project Intelligence®

Moderator

Janelle Abaoag

Project Insight

Marketing, Public Relations

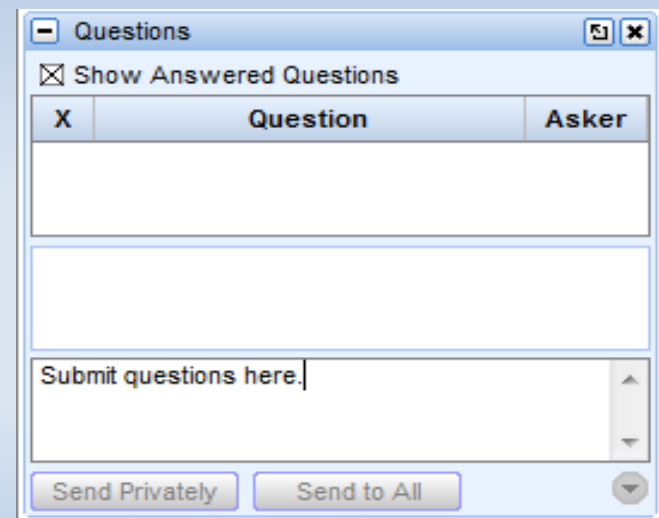Janelle.Abaoag@projectinsight.com

www.projectinsight.net

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Things to Know…

▶ All participants will be on mute

▶ Questions are welcome

- Please use the questions box to ask questions

- The moderator will select questions

- All questions will be answered today or by email at info@projectinsight.net

▶ Webinar recording available in the PI Community

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Questions ▭ ▣ ✖
☒ Show Answered Questions

X	Question	Asker

Submit questions here.

Send Privately   Send to All

Presenter

Diane C. Altwies, MBA, PMP

CEO, Core Performance Concepts Inc.

Training in project management,

PMP® and CAPM® certification, leadership,

business analysis, agile and six sigma

daltwies@cpconcepts.net

www.coreperformanceconcepts.com

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Project Management Institute

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Presenter

Janice Y. Preston, MBA, CPA, PMP

COO, Core Performance Concepts Inc.

Training in project management,

PMP® and CAPM® certification, leadership,

business analysis, agile and six sigma

jypreston@cpconcepts.net

www.coreperformanceconcepts.com

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Presenter

Debbie Lundberg, MBA

Author, Speaker, Coach

"Reversing the Slobification of America"

Debbie@DebbieLundberg.com

www.DebbieLundberg.com

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Poll: Who Is on the Call?

▶ Are you:

- ■ A Project Manager without your PMP certification?

- ■ A PMP in the role of a Project Manager?

- ■ A program manager?

- ■ Just looking for ways to use Project Insight more effectively?

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Goals of the Advanced Series

- Expand your knowledge of more complex tools and techniques

- Build leadership skills to manage people more effectively

- Identify practical ways to begin using advanced techniques

- Explore other methodologies or techniques that enhance

  project management competency

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Fact or Fiction...

"At last we've reached a consensus! This meeting is boring!"

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Poll

▶ How many of you LOVE

meetings?

■ Yes!

■ No!

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Objectives of the Webinar

▶ At the end of this webinar, you will be able to:

- Set meeting agendas

- Identify roles & participants for meetings

- Determine the meeting set-up/environment

- Handle questions, reactions & distractions

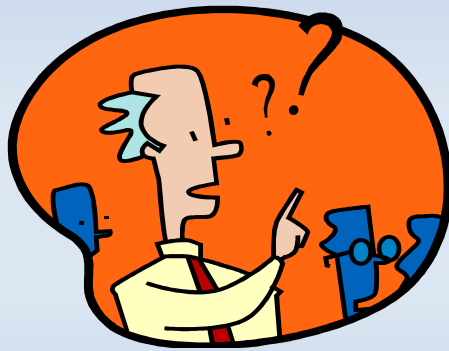**PROJECT insight**®

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A Look Ahead…Our Hour Together

▶ Set meeting agendas

▶ Identify roles & participants for meetings

▶ Determine the meeting setup/environment

▶ Handle questions, reactions & distractions

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Question for YOU

How many hours a day are you in meetings?

(Use the Question box to answer)

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Objectives

- **Set meeting agendas**

- Identify roles & participants for meetings

- Determine the meeting set-up/environment

- Handle questions, reactions & distractions

Set a Meeting Agenda

- ▶ Determine the focus/topic

- ▶ Set a goal/objective

- ▶ Think about time/timing

- ▶ Plan 2 – 4 agenda items

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Focus/Topic

- The more specific, the better

- Be clear in communicating

    - Project Review: Time, Value & Revenue

        - *NOT – Project Review*

    - Lessons Learned: XYZ Project Review

        - *NOT – Project Review*

- Be relevant & realistic
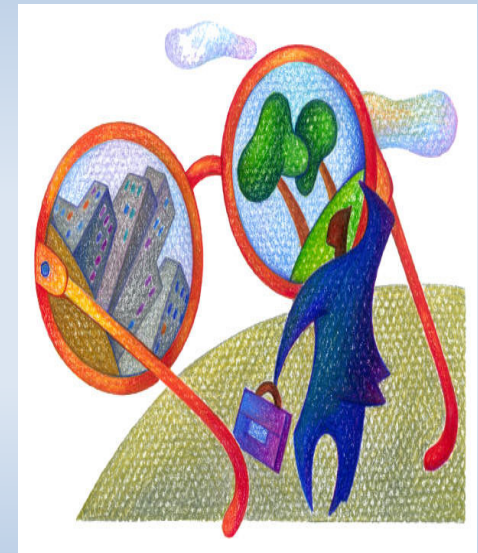
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Objectives

▶ Set meeting agendas

▶ **Identify roles & participants for meetings**

▶ Determine the meeting set-up/environment
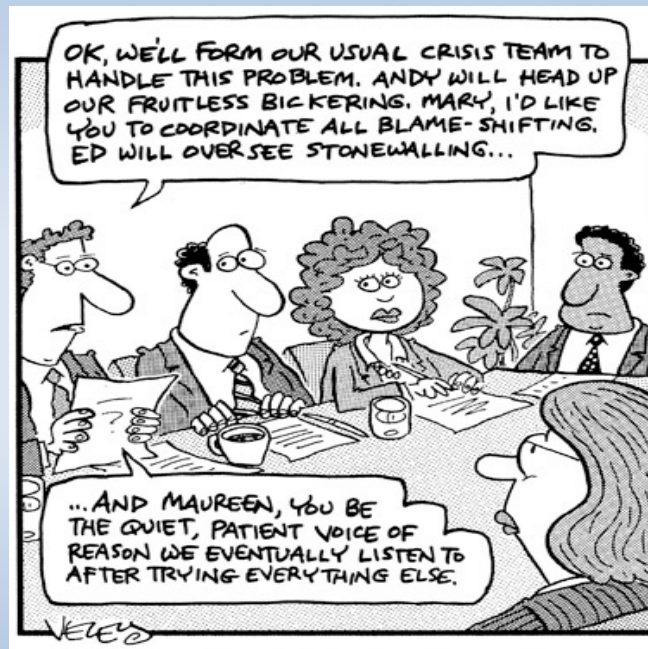
▶ Handle questions, reactions & distractions

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Identify Roles & Participants

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Identify Roles & Participants

A Role is what to fill, and a Participant is who to "play" that role...

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Identify Roles & Participants

It's as though each meeting is a movie,

and you are the director...what stars do

you want in your show?

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Identify Roles & Participants

Are you thinking:

"Debbie – This will take a lot of time!" ?

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Identify Roles & Participants

Time invested planning a meeting well results

in a well planned meeting...

time invested in sharing <u>expectations</u> creates

a well <u>executed</u> meeting!

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Identify Roles & Participants

- Think roles first, participants later
- For each role, a reason
- For each participant, an expectation
- Share both with invitees
- (No script)
  - Impromptu
  - With cues from you

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Objectives

- Set meeting agendas

- Identify roles & participants for meetings

- **Determine the meeting set-up/environment**

- Handle questions, reactions & distractions

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Meeting Set-up & Environment

- ▶ Types of meetings

- ▶ Environment choices

- ▶ Set-up impact

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Informal Meetings

- Have an agenda

- Get permission

- Share time

- Share topic

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Informal Meetings

Excuse me, NAME, is this a good time to talk for about X minutes on SUBJECT?

(Not "Gotta minute?" or "Is this a good time?")

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Formal Meetings

▶ Have an agenda

▶ Get participants in roles (People & Expectations)

▶ Respect time

▶ Stay on topic

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One-on-One

- ▶ Watch personal space

- ▶ Be respectful

- ▶ HOST

  - ▪ Heard

  - ▪ Open

  - ▪ Share

  - ▪ Talk/Tell

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Group

- Facilitate with guidelines set by participants

- Be aware of time & topic

- Share objective & check in

- Check personalities

- Get language for challenges
  - You may be right…
  - Let's discuss at X time/place
  - Focusing back on…

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Environment Choices

- Walk and Talk

- In office

- In conference room

- Off-site

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Walk and Talk

▸ Keeps meetings short

▸ Usually informal

▸ 2 – 3 total participants only

▸ Be brief and be gone

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In Office

- Yours if a lot to show

- Theirs if you want to leave

- Agree to no multi-tasking

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In Conference Room

- ▶ If more than 4 people
  - ▪ Space dictates often
  - ▪ Reserve room

- ▶ Sit at table (not around room edge)
  - ▪ Leaders – end of table facing exit
  - ▪ Opposite leader – direct, even argumentative
    - ▶ Place friend here, if concerned
  - ▪ Leader's right – yes-man/woman
    - ▶ Place foe here, if concerned

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Off-Site

▶ Watch vacation mentality

▶ Consider travel time(s)

▶ Be clear on value/reason

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Objectives

- Set meeting agendas

- Identify roles & participants for meetings

- Determine the meeting set-up/environment

- **Handle questions, reactions & distractions**

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Questions, Reactions & Distractions

- Questions

- Reactions
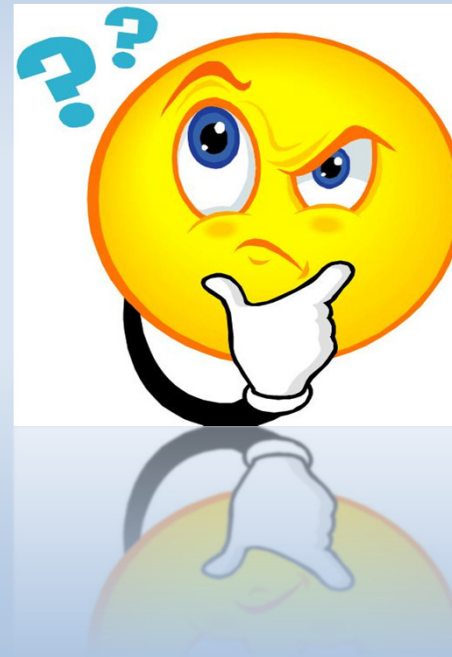
- Distractions

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Questions

- ▶ Accept questions throughout

- ▶ Watch "Good Question!"

- ▶ Repeat/agreement on question

- ▶ Ask if answered

- ▶ Parking lot – specifically when/where

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Reactions

- **Think** *Respond vs. React*

- **BTS**

- **Language**

    - You may be right

    - Perhaps I was not clear

- **Reset**

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Distractions

- ▶ Discuss up-front – their guidelines

- ▶ Stop, stare and wait (smile)

- ▶ Value vs. patience

- ▶ People follow motion and sound

- ▶ Silence is your friend

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Bonus Summary – New Format!

- **Stay on-time** – not on the hour

- **Stay on-topic** – clear agenda/objective

- **Respect over volume** (facilitate vs. meet)

- **Summarize yourself** (within 24 hours)

- **All speak** (no gum/eating/multi-tasking)

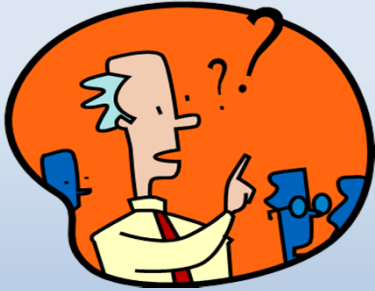- **Results vs. tasks** (hold accountable)

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Question for YOU - Your Actions

What is one thing you will choose to do

differently as a result of joining us today for

<u>Meeting Effectiveness</u>

and when will it begin?

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Review

- How do you set meeting agendas?

- How do you identify roles & participants for meetings ?

- How should you set-up of the meeting environment?

- How do you handle questions, negative reactions, and distractions?

- *Question: What did you want covered in Meeting Effectiveness that was not?*

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To Stay Connected

- **Get LinkedIn** - http://www.linkedin.com/in/DebbieLundberg

- **Facebook**-Facebook.com/PresentingPowerfullybyDebbieLundberg

- Follow me on **Twitter** (@DebbeLundberg)

- Register for free tips & read **blog** at www.DebbieLundberg.com

- Books
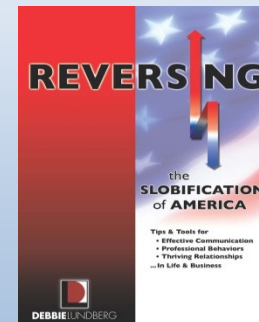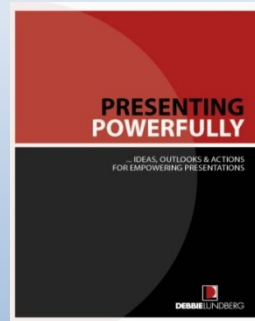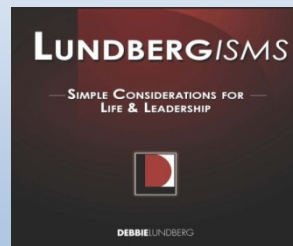
Books for Credentials

- *Achieve PMP® Exam Success*

- *Achieve CAPM® Success*

- *Program Management Professional (PgMP®) Study Guide*
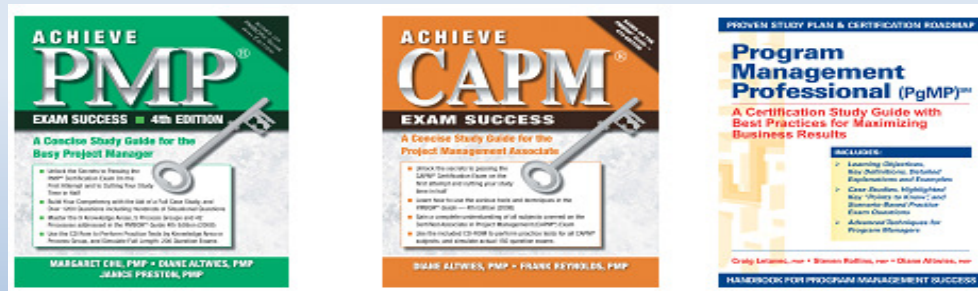
To order: www.jrosspub.com

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Online Courses for PDUs
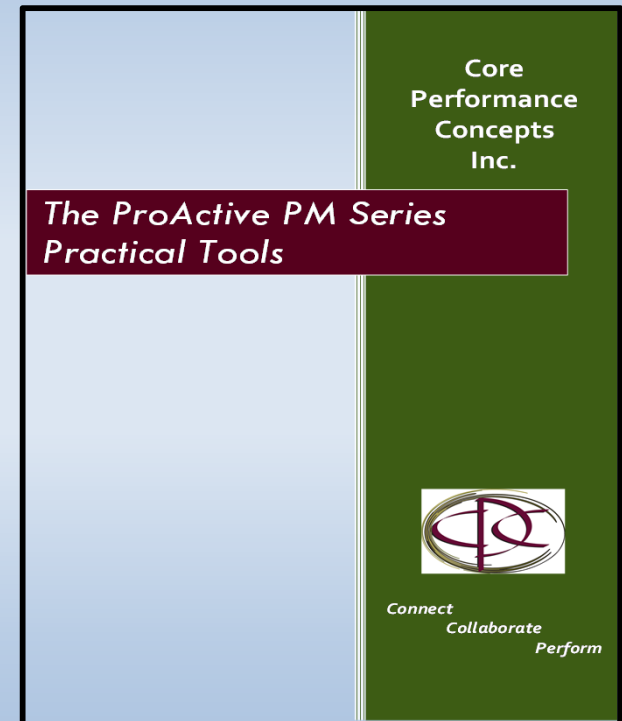
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http://www.coreperformanceconcepts.com/tools.html

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2013 Advanced Webinar Series

- **The 4th Wednesday of Every Month - 8:00am PT**
- **Topics**
  - **Jan –** Validating Requirements
  - **Feb –** Skills for This Century (NEW!)
  - **Mar –** Communication without Generational Bias
  - **April –** Mental Agility for Project Managers (NEW!)
  - **May –** Team Building in a Virtual World (NEW!)
  - **June –** Perspectives on Agile Concepts & Techniques
  - **July –** 4 Questions Leaders Overlook
  - **Aug –** Managing Your Boss & Sponsor (NEW!)
  - **Sept –** Change Management (NEW!)
  - **Oct –** The Art of Getting **IT Done (NEW!)
  - **Nov –** Difficult Conversations
  - **Dec –** no webinar; enjoy the holidays!

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Register Ahead of Time

- Go to www.projectinsight.net

- 2 ways to register:

  - Free Project Management Training

  - Training & Webinar Calendar

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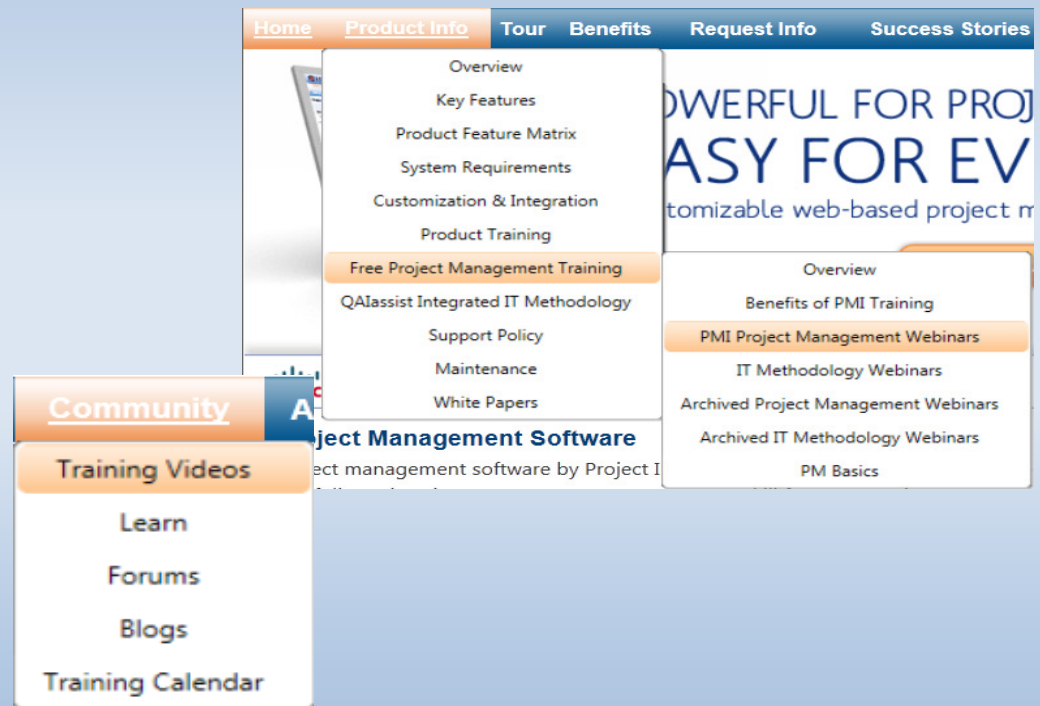
Earn PDUs

- **You will automatically receive your PDUs via email after the webinar**

- For further questions: Janelle.Abaoag@projectinsight.com

- Earn 1 PDU for each webinar session attended

- To register your PDUs go to www.pmi.org

- Login as a member of PMI

- Select **Category B – Continuing Education**

- Knowledge Areas: **Integration, Human Resources, Communications**

- Process Groups: **All: Initiating, Planning, Executing, Monitoring and Controlling**

- Enter the information provided on your proof of attendance

- Click continue

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