



# Module 4: Organisational Skills (Part 1)

PROFESSIONAL DESIGNATION ONLINE PROGRAMME  
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|--|----|
| MODULE 4: Organisational Skills .....                          | 5  |
| Module outcomes.....   | 5  |
| Planning and organising skills .....                           | 5  |
| Effective Organising Skills: Seven Steps.....                  | 6  |
| Be clear about what you need to do .....                       | 6  |
| Decide when you are going to do it.....                        | 6  |
| Give yourself time and space. ....                             | 6  |
| Decide what is important and what is urgent.....               | 7  |
| Break down and delegate tasks.....                             | 7  |
| Don't get frustrated by extra tasks. ....                      | 7  |
| Stay on top of things. ....                                    | 7  |
| What is Project Management? .....                              | 8  |
| Basic Rules of Project Management.....                         | 8  |
| Project Documentation .....                                    | 8  |
| Gantt Charts .....   | 10 |
| Regular Project Updates .....                                  | 11 |
| Know what's going on.....                                      | 11 |
| Negotiation and Renegotiation .....                            | 11 |
| Project planning.....  | 11 |
| TEAMWORK .....   | 12 |
| The building blocks of project planning .....                  | 12 |
| Preparing a project plan .....                                 | 12 |
| Visually representing a project.....                           | 13 |
| Project planning software.....                                 | 13 |
| Bar and star charts.....                                       | 14 |
| Conclusion.....  | 14 |
| Risk planning.....   | 15 |
| Risk management is a team or whole organisation business. .... | 15 |
| Steps for a successful risk management strategy .....          | 15 |
| Take Ownership of Risk Management .....                        | 17 |

|   |    |
|---|----|
| Team and group working .....  | 17 |
| What are Groups and Teams? .....  | 18 |
| Types of Groups .....   | 18 |
| Task-Based and Experience-Based Groups .....                            | 19 |
| Group Communication .....   | 19 |
| Important Defining Features of Groups: .....                            | 20 |
| Group life cycle .....  | 20 |
| Stage One: The Establishment and Formation of the Group (Forming) ..... | 21 |
| Stage Two: Group Conflict and Fragmentation (Storming) .....            | 22 |
| Stage Three: The Development of Group Norms (Norming) .....             | 22 |
| Stage Four: The Working Stage (Performing) .....                        | 22 |
| Stage Five: The Disbanding Stage (Adjourning/Mourning) .....            | 23 |
| Building group cohesiveness .....                                       | 23 |
| The Development of Group 'Norms' .....                                  | 23 |
| Examples of Group Norms .....   | 24 |
| Effective team working skills .....                                     | 25 |
| Task vs. Process Team Roles .....                                       | 25 |
| Key Task-Focused Team Skills .....                                      | 26 |
| Key process-focused team skills .....                                   | 26 |
| In conclusion .....   | 27 |
| Strengths and Weaknesses of Groups .....                                | 28 |
| Possible Group Strengths .....  | 28 |
| Possible Group Weaknesses .....   | 28 |
| Collaboration or working together .....                                 | 29 |
| What is Collaboration? .....  | 29 |
| Starting to Collaborate .....   | 29 |
| Groups and Teams .....  | 31 |
| A final thought .....   | 31 |
| Group roles .....   | 31 |
| Leadership/facilitator roles .....                                      | 31 |

|  |    |
|--|----|
| Team Roles.....                                  | 33 |
| Summary of Group Roles .....                     | 35 |
| Difficult group behaviours .....                 | 35 |
| Conflict .....                                   | 35 |
| Non-participation or withdrawal .....            | 36 |
| Monopolising .....                               | 36 |
| Scapegoating .....                               | 37 |
| Additional Problem Areas .....                   | 37 |
| Leading virtual teams .....                      | 38 |
| Transparent Communication .....                  | 38 |
| Patience.....                                    | 39 |
| Rapport-Building.....                            | 39 |
| Results-Focus .....                              | 40 |
| Intercultural Skills .....                       | 40 |
| Technology Skills .....                          | 40 |
| Planning and structuring effective meetings..... | 41 |
| What is a Meeting?.....                          | 41 |
| The Purpose of Meetings .....                    | 41 |
| Components of Meetings.....                      | 42 |
| Types of Meetings .....                          | 42 |
| Planning and Preparation for a Meeting .....     | 43 |
| The Role of the Chairperson .....                | 45 |
| The Role of the Members.....                     | 46 |
| Why Meetings May be Ineffective.....             | 47 |
| Summary .....                                    | 47 |
| Remote meetings and presentations.....           | 47 |
| Hosting, Attending and Presenting .....          | 48 |
| Hosting Remote Meetings .....                    | 48 |
| Attending Remote Meetings .....                  | 49 |
| Prior Preparation and Planning.....              | 50 |

|   |    |
|---|----|
| Presenting at Remote Meetings.....                | 50 |
| A final word .....                                | 51 |
| What is an Agenda?.....                           | 52 |
| How to Set an Agenda.....                         | 52 |
| Breaks in the Agenda.....                         | 54 |
| Making Meetings More Productive .....             | 54 |
| Mindful meetings.....                             | 55 |
| What is Mindfulness? .....                        | 55 |
| Mindful Meetings: A Ten Step Process.....         | 55 |
| Just Common Sense? .....                          | 57 |
| The role of the administrative professional ..... | 58 |
| The minute-takers responsibility .....            | 58 |
| Preparation: Before the Meeting.....              | 58 |
| On the Day of the Meeting.....                    | 59 |
| Taking the Minutes of a Meeting.....              | 59 |
| Handy Hints for Minute Writing.....               | 60 |
| Supporting the Process .....                      | 60 |
| After the Meeting .....                           | 60 |
| Checking and Approving .....                      | 61 |

## MODULE 4: ORGANISATIONAL SKILLS

If you are a well organised person, you will remain well organised regardless of the job you will be doing. It is one of the soft skills you will bring with you to any position and is an important employability skill.

Strong organisational skills are important for a variety of reasons, and they all have a common denominator – they turn you into an efficient and effective employee.

Organisational skills in the workplace (and they look good on your CV) are collaboration, communication, teamwork, delegation, planning, prioritising, time management, physical organisation (filing, record keeping, stock inventory) and work-life balance.

In this module we will be looking at planning, collaboration, teamwork, and meetings.

## MODULE OUTCOMES

On completing Module 4 Organisation Skills you will be able to:

- Identify effective organising skills and put them into action
- Identify, manage, and plan a small project
- Identify a risk strategy when planning an event
- Use tools to effectively plan project e.g. Gantt Chart
- Collaborate with team members effectively and understand the group life cycle
- Use effective team working skills and lead with confidence
- Work effectively with a team by understanding the roles each team member plays (Belbin)
- Manage difficult group behaviours
- Conduct virtual and traditional meetings with confidence
- Host, attend and present at remote meetings

## PLANNING AND ORGANISING SKILLS

How often have you said to yourself ‘*I really need to get organised?*’ and then failed to do so? It is a common problem.

Poor organisation usually means less productivity and missed opportunities and can lead to increased procrastination and stress.

There are a few simple things that you can do that will help you to ensure that you get organised and stay that way. And what is even better is that these skills can be used at home or at work.

Organising skills are really a combination of time management and self-motivation. Consider organisation in terms of a series of steps that you can take.

## EFFECTIVE ORGANISING SKILLS: SEVEN STEPS

### BE CLEAR ABOUT WHAT YOU NEED TO DO

If you are one of those people who struggle to remember just what you have agreed to do or what you wanted to do if you had enough time, then keep a list.

If one list is not enough, then keep several. Some people find that they work best with one single list, but others have a long-term 'To Do' list, supplemented by a daily 'Tasks' list. Others also have a list of jobs for the week as well. It is a matter of preference whether you use paper or electronic lists.

There are many applications available today to use to keep your lists organised. Some of them are free while others have a small monthly fee. Microsoft has a great application called Todoist ([www.todoist.com](http://www.todoist.com)), which syncs to other devices as well to keep you in control. You can create up to 25 different projects (categories) on the free version. What is nice about the application is that if you are going through your emails and there is something you would like to add to your list, you can email it to the application and it adds it to your list. No more forgetting little things!

There are many other productivity apps that you can use e.g. Asana, Trello.

### DECIDE WHEN YOU ARE GOING TO DO IT.

Research shows that our brains are hard-wired to worry about things that we have not done.

This is why you wake up in the night panicking about that piece of work you forgot. Interestingly, putting a job on a 'To Do' list and deciding when you are going to do it seems to be enough to switch off the bit of your brain that worries, at least until you have missed the slot you had identified.

### GIVE YOURSELF TIME AND SPACE.

Getting organised does not happen by chance. You need to give yourself time to do it.

Take a bit of time each day to think about what you have got to do that day, and plan when you are going to do it. It is best to do this either at the beginning of the day, or at the end of the day for the next one. If you commute by train or taxi, you might find your journey is the ideal time to do this, but if not, just take 10 minutes when you first get into work, preferably away from your desk to avoid distractions.

If you struggle to find that time, schedule it into your diary. If your electronic calendar is public, make sure you describe it in a way that your colleagues will not immediately identify as 'time that can be used to come and talk to you'. For example, use initials, so that it looks like you have got a meeting, such as 'DSW', or 'Do some work', and 'PMD' or 'Plan my day'. You know what it means, but nobody else will. And LEAVE YOUR DESK. Go and sit in the canteen, or a quiet corner of a meeting room, to avoid anyone talking to you, or the temptation to 'just check your emails'.

### DECIDE WHAT IS IMPORTANT AND WHAT IS URGENT.

It is a delicate distinction, but everything can be separated into either urgent or not, and important or not.

### BREAK DOWN AND DELEGATE TASKS.

Break tasks down into their component parts and consider whether you can delegate any of them.

Do you really need to do the whole task straight away? And do you really need to do parts of them? It can sometimes take as much time to delegate as to do the task, especially if it is relatively quick to do, but could take a while to explain. But if it is relatively straightforward to explain, and simple but long-winded to do, it is an ideal task for delegation.

### DON'T GET FRUSTRATED BY EXTRA TASKS.

We all know how it feels...

You have just spent 10 minutes organising yourself, and you get back to your desk to find an email from your boss telling you to drop everything and just finish a report that has suddenly become the most important and urgent issue in the world.

**Do not get cross or frustrated.** At least you know whether you have anything else on your list which cannot wait and can negotiate extended deadlines for other work from an informed point of view!

### STAY ON TOP OF THINGS.

Especially when you are busy, it is easy to let your daily organising session slip.

You just want to go home, or you really need to get on with something else. But it is important to keep on top of your scheduling and organising, as otherwise everything gets in a mess, and then it takes hours to untangle.

When you think about general tidying, the principle of 'staying on top of things' really makes sense. For example, if you insist that your children put away each set of toys before getting out the next one: railway away before Lego comes out, dolls' tea set away before a jigsaw can be opened and so on, then the tidying up at the end of the day takes much less time.

If you leave all the tidying until the end of the day, it could take a very long time, and in the meantime, there may be toys or bits of toys that have been stood on and broken, kicked under furniture, lost or swept up in another game.

The same rules apply to general organisation: keep on top of it, and it is a simple matter to adjust. Let it get on top of you, and it will take a long time to sort out.

## WHAT IS PROJECT MANAGEMENT?

You may have heard a lot about project management and think that it is a complex process. Many people find the idea of project management a bit daunting.

Project management is deciding what needs to be done, and then making sure that it happens.

## BASIC RULES OF PROJECT MANAGEMENT

Good project management, like risk management, is a team activity.

One of the useful elements of formal project management is that it forces you to bring together the right people to run the project. It also has the advantage of requiring good documentation.

These give us two fundamental rules of project management:

1. **Decide who needs to be involved early on** and get them round the table to agree the scope, desired outcomes and time-lines for the project.

This group should formally be designated the **Project Board** and be responsible for the project.

2. **Document everything.** You need to write down, and regularly review, your scope, desired outcomes and time-lines, and who is responsible for each task.

It is also helpful to document anything related to the project, even casual phone calls. Keep a book by the phone and get into the habit of writing notes during phone calls. It can also be useful to send an email to the person you have been speaking to after the call noting what you discussed and agreed.

It sounds bureaucratic, but you would be surprised how often two people emerge from a conversation with completely different ideas of what was agreed. Writing it down and sharing it ensures that there are no misunderstandings.

## PROJECT DOCUMENTATION

There are several essential pieces of project documentation which you will, as a project manager, need to prepare.

You will need to take the time to ensure that project documentation is read and agreed by all those involved, if necessary, stand over them as they do. However long this process takes, it is well worth the investment as it could save you huge amounts of time and trouble in the future.

Good Project Documentation Includes:

- **A one-page summary of the project:** which sets out the project sponsor, the project manager, the scope, the important deadlines, the budget, and an ‘elevator pitch’ of the project, or the way that you would describe it to the CEO if you met him in the lift (or elevator) and he asked what you were working on
- **A time-line/project plan:** which sets out how long each task will take, constraints on each, and who will be involved
- **A budget:** including both people and financial resources, which can often be the hardest thing to agree
- **A risk analysis**

## GANTT CHARTS

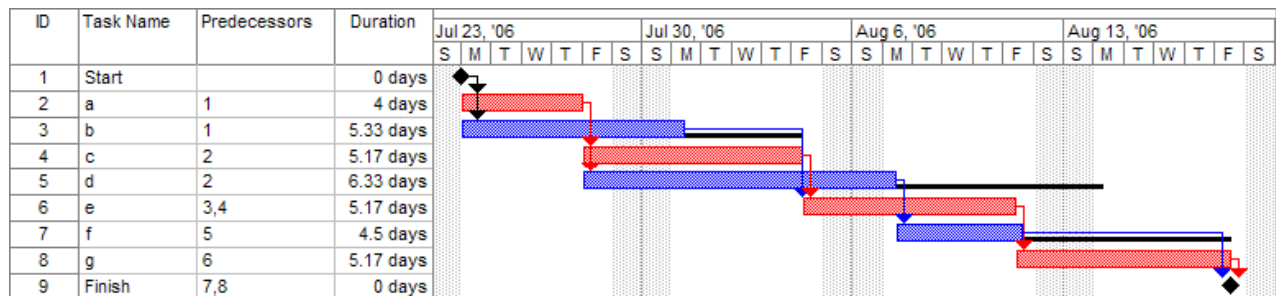
Probably the most time-consuming to prepare, but most essential, is the project plan or time-line.

One of the most useful forms is called a *Gantt Chart*.

This sets out in visual form:

- All the tasks that must be completed during the project
- Any constraints on when tasks can be completed e.g. which tasks must be completed before others can start, or deadlines
- The likely and maximum duration of each task
- The resources that will be dedicated to each task
- The critical path i.e. the tasks that will define the length of the project because they cannot be shortened

A simple Gantt Chart usually looks something like this:



Because it shows linkages between tasks, such a diagram helps to prevent you from falling into the trap of the ‘miracle box’, as in *‘in this area, a miracle will happen which will move us from where we are to where we need to be’*.

You need quite a lot of information to prepare a Gantt chart, some of which will be estimated.

The more you estimate, the less accurate it will be, and you may need to revisit your estimates several times before you agree a time-line with the project sponsor or Project Board.

If you make realistic estimates of the required time for each task, within the resource constraints, and your Gantt chart shows your project finishing three months after the desired end-date, you will need to renegotiate the deadlines.

This process is called ‘*expectation management*’ and, like good planning, will avoid problems later.

Your next task as project manager is to get the work started. If you have done the planning, this should be relatively straightforward as all those involved will know what they are doing. You will only need to check periodically that all is going according to plan.

### REGULAR PROJECT UPDATES

As project manager, it is your job to get regular updates from task managers, to ensure that the project is on track. You also need to report on project progress to the 'Project Board' and let them have information about any emerging problems.

Your updates from task leaders do not have to be formal. They can be as simple as a regular telephone conversation about progress. You may prefer a more formal reporting structure, such as a one-page report. This could be in a traffic-light format, with task managers asked to say whether their task is on track (green), at risk of delay or problems (amber) or suffering delays or problems (red).

### KNOW WHAT'S GOING ON

As project manager, it is crucial that you know what is going on. It is best not to rely on formal reports, as these can be misleading. Get out there and go and talk to the task managers. Get to know them, and build good relationships, so that when problems emerge you are the first person they call, instead of the last. Although it is not necessarily your job to solve everyone's problems, you may find that your position gives you an overview which means that you can mediate between task managers and resolve emerging issues, provided you know about them early.

### NEGOTIATION AND RENEGOTIATION

Finally, project managers need to have strong negotiating skills.

You need to be prepared to negotiate and renegotiate scope, specification, budget, deadlines and time-lines with both the project board and with task managers. Flexibility, organisation, and the ability to think strategically and focus on what is important are key.

### PROJECT PLANNING

The above section sets out the basics of how to manage projects, including drawing up a project plan. This section provides more detail about this process. It explains the elements of a project plan and suggests a way in which to prepare one. It also offers a visual way to represent a project plan and timeline.

It is often said that a picture is worth a thousand words. If so, it is well worth your time to find out a bit about how to draw pictures that will represent your project plan!

## TEAMWORK

Project planning is a team activity, not one to do by yourself (unless you are the only person involved in the project). Everyone who is going to be involved should be part of drawing up the project plan and agreeing deadlines, resources and what needs to be done, and should also be able to see the project plan on an ongoing basis to check what needs doing.

## THE BUILDING BLOCKS OF PROJECT PLANNING

The two basic building blocks of project plans are *tasks* and *milestones*.

- **Tasks** are the pieces of work that must be done before the project is complete. They last a period of time, and require resources, people, or money.
- **Milestones** are achievements, which happen at a defined point in time. They have no resource requirements and are achieved because of task completion.

## PREPARING A PROJECT PLAN

One of the best ways of project planning involves a two- or three-hour session with all the key people present, using two colors of post-it notes and a white board to map out what needs to be done, when and by whom. Simple, but effective.

The process should run something like this:

1. Using one color of post-it notes, write down all the milestones that you need to achieve on the way to the project outcome, and number them in chronological order. Stick them all down the left-hand side of the board.
2. For each milestone, identify any others that need to be achieved first before that one can be either started or finished (precursors). Write them on the post-it note for that milestone.
3. On a different color of post-it notes, identify all the tasks that need to be done to achieve each milestone.

Use common sense to decide what level of detail you want to work at. For example, if your project is a recruitment exercise, you will want to spell out each step, from preparing job descriptions, through advertising, sifting, interviewing, carrying out checks, and offering the job. For a much larger project, you might include a task to 'recruit project administrator'.

4. For each task, identify which milestones they feed and write the milestone number on the post-it for the task. Write the feeder tasks on the post-it for each milestone.
5. Identify how long each task is going to take and write it on the task post-it.
6. Identify what resources you need to achieve each task and write it on the post-it.

At this point, you may find that you have too much information for the post-it notes. If so, either add others in different colors for duration and resources or continue with a second for each task and/or milestone.

7. Identify any time constraints on any milestones or tasks, such as ‘must be completed before the end of the financial year’. Write them on the post-it.
8. Make a calendar on the white board, setting out the duration of the project, period by period.
9. Place all the milestones and tasks that have a time constraint in the right place on the calendar.
10. Now place all the other milestones and tasks that are linked to those with a time constraint and draw arrows between them to show which order they need to be completed. Make sure that you have left enough time for each task to be completed according to your estimate.
11. If you have any milestones or tasks left, place those at a suitable point.
12. You should now be able to see the ‘critical path’, the process that determines how long your project will take.
13. Use a whiteboard pen to mark on potential ‘slack’ i.e. where tasks can slip a little without affecting the critical path.
14. Finally, look at what resources you will need in any given period. If you need additional resources, make sure that you have given yourself time and money to acquire them.

You now have a simple Gantt chart and project plan!

## VISUALLY REPRESENTING A PROJECT

Depending on how long your project will run, you may or may not be able to rely on keeping the white board with post-it notes. If you can, this may be the best, most flexible and most obviously visible way of keeping a record of your project plan, which can be updated in real time to reflect changes. If you cannot, you will need an alternative.

## PROJECT PLANNING SOFTWARE

Project planning software, such as Microsoft Project, is available to draw up project plans. It will take your information, in the form of lists of tasks, with deadlines, and milestones with dates, and put it into a visual form. It helps you to set out what you have got to do, how long it will take, and links between tasks.

It can also encourage you to over-complicate, and get lost in the detail, rather than focus on the big picture. The result is likely to be a diagram of such complexity that nobody can understand it. You may therefore find it easier to use the process above, and then draw a simpler picture, such as a ‘bar and star’ chart.

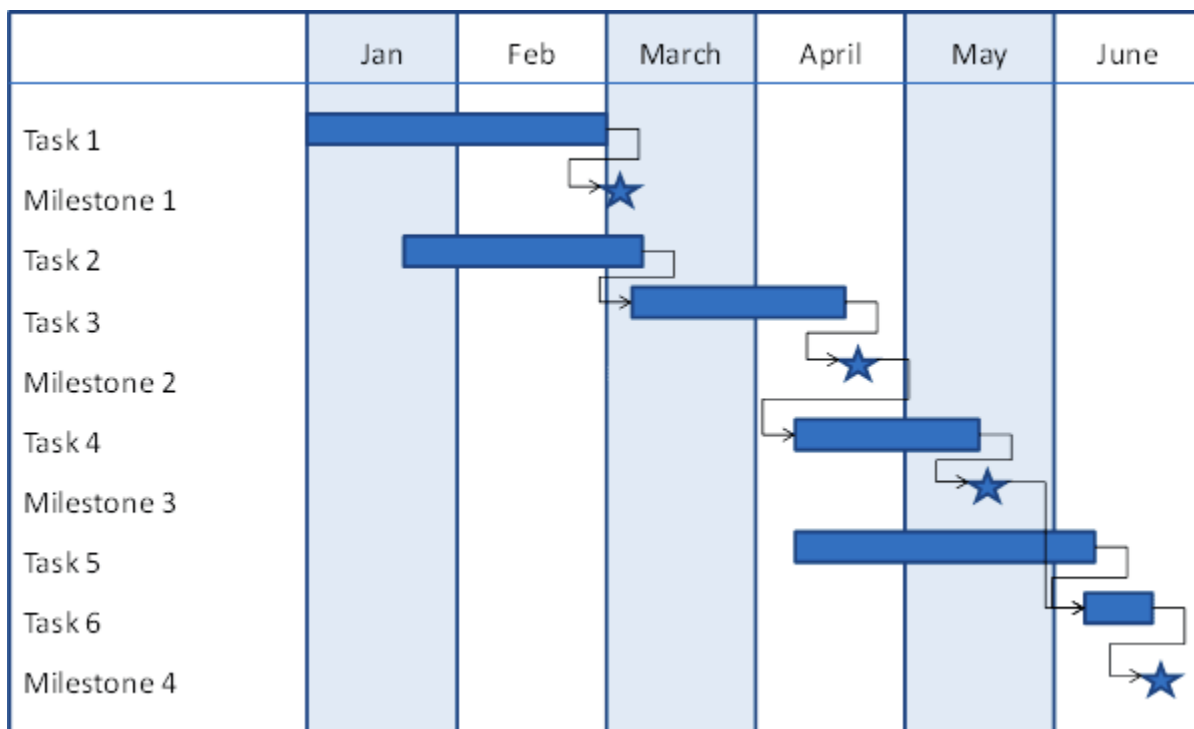
## BAR AND STAR CHARTS

A bar and star chart is a simple form of Gantt chart.

Once you have identified your tasks and milestones, anyone can draw up a bar and star chart with either ruler and pencil, or a program like PowerPoint or Excel.

It uses only three elements: bars for tasks, stars for milestones, and elbow connectors in between. Use the 'connectors' to link together bars and stars.

An example of a star and bar chart:



The important thing is to keep your star and bar chart simple, so that it can fit easily on a single page. If you have too many tasks and milestones, combine some of them for clarity.

## CONCLUSION

Remember that it is not enough to draw up a fantastic project plan.

You also need to implement it, and that involves others. It is important to make sure that your project plan is kept visible.

Good ways to do this include using whiteboards and keeping a record of progress in an obvious place, somewhere where the whole team can see it, and make sure that everyone is involved in

updating regularly, or better, still, that they can update it and annotate it themselves. That way, they are more likely to take ownership, and the project is much more likely to take off.

## RISK PLANNING

In its simplest terms, risk management is thinking about what could possibly go wrong, deciding how likely and/or catastrophic that would be, and taking action to avoid either the problem or its consequences.

## RISK MANAGEMENT IS A TEAM OR WHOLE ORGANISATION BUSINESS.

The best way to carry out a risk analysis is with all those involved talking around the table. That way you can have a sensible and complete discussion about all the risks and how to mitigate them. Revisiting your risk register on a regular basis is a team activity, not an individual one.

## STEPS FOR A SUCCESSFUL RISK MANAGEMENT STRATEGY

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### WHAT COULD POSSIBLY GO WRONG?

Write down everything that could possibly go wrong, whether it is big or small.

Include everything that you can think of is relevant. Brainstorming is ideal here, as it is likely to get all the ideas out. Then you might want to group the ideas into themes. Although this is not essential, it can be helpful where you have identified a lot of risks, as you can produce a summary risk register, with one main risk for each theme. You can also see where your risks overlap, and ensure that each one is genuinely different, and it is easier to think about who might take responsibility for each.

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### ASSIGN A DATE BY WHICH THE RISK WILL HAVE OCCURRED

Every risk needs a date by which it will either have happened, or no longer be at risk of happening.

Agree this date and enter it in your risk register. It is not good practice to put 'Ongoing' under this column, so do try to quantify it.

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### QUANTIFY YOUR RISKS

On a scale of 1–5, where 5 is high, decide how likely each risk is to happen (*likelihood*). Then decide, again on a scale of 1–5, how much of an impact it would have on the project if it happened (*impact*).

Again, discussion is helpful. Agree first what each value means. For example, impact, '5' means that the project cannot continue, '4' means that it would have a significant effect on the bottom line, and so on. As you get further down the list of risks, you might want to revisit those you did earlier to make sure your analysis is consistent.

Multiply ‘likelihood’ by ‘impact’ to give you an overall rating for each risk, from 0 to 25. This will show you where to concentrate your effort. You can use a traffic light system for this, where Red is anything over about 18, Amber is 10–18 and Green is anything under 10. And if you feel that any of them do not come high enough up, then revisit your analysis. You must be comfortable with this. Any risk which rates Red or Amber should be mitigated in some way.

Example:

| Risk   | Likelihood | Impact | Overall Risk |
|--------|------------|--------|--------------|
| Risk 1 | 2          | 2      | 4            |
| Risk 2 | 4          | 5      | 20           |
| Risk 3 | 4          | 3      | 12           |

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## DECIDE ON MITIGATION

There are four main types of mitigation action or strategy: acceptance, avoidance, limitation, and transference.

- **Acceptance** means accepting the risk and taking no action to mitigate it. It is a reasonable strategy for a risk that will only have a small impact, or is unlikely to happen. It is a risk where taking action to mitigate it could be expensive.
- **Avoidance** means making every effort to avoid the risk. This strategy is expensive, and only worthwhile for catastrophic risks that are almost certain to happen.
- **Limitation** is the most usual mitigation strategy. The aim is to limit either the likelihood or the impact of the risk, and therefore reduce the effect that it will have on the business or project. It is a bit like an acceptance/avoidance strategy.
- **Transference** is the transfer of risk to someone else who is prepared to accept it. This is a strategy used by a lot of companies to avoid having to undertake activities which are not part of their core competences but would be a problem if they went wrong. It includes, for example, outsourcing of payroll management.

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## RE-QUANTIFY THE RISKS

**Have another look at each risk.** How much does your mitigation reduce the likelihood and/or impact? Recalculate the overall rating for each risk. Any which are still Red or Amber need further mitigation.

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## ASSIGN RESPONSIBILITY

**Every risk needs to have a single owner.** That is not necessarily the person who is going to carry out all the mitigation. It is the person who is responsible for ensuring that the mitigation happens, and who answers to the Board or project manager for the risk. It is no good assigning risk ownership to

someone who is not present, as they are unlikely to accept it. Every risk should be owned by someone who is round the table and part of the risk discussions.

Periodically Review and Close/Move to the Issues List

Every few months, at least, you should review the risk register, and check:

- Progress on mitigation, and whether the mitigation is still relevant, or if more and/or different action is necessary.
- Whether any of the risks are past their 'sell-by' date, and can therefore be closed (that is, you can agree that they are no longer likely to happen), or have already happened, and should therefore be moved to the 'Issues list'.

A risk is an event that might happen at some point. Once it happens, it is no longer a risk, but an issue, which also needs to be managed.

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## DEAL WITH ISSUES

**Alongside the risk register, you also need to maintain an active 'issues list'**, which includes all those risks which have already happened, and therefore become issues, and how you are managing them. This may be the same as the original mitigation, or it may require different action now the event has happened.

## TAKE OWNERSHIP OF RISK MANAGEMENT

It is no good having the best risk analysis in the world if nobody has read it, and nobody acts as a result.

Risk management, and crucially, the thinking about 'what could possibly go wrong, and what should we do to prevent it?' should be a key part of your strategy development.

You may be surprised at the previously unmentionable concerns which become discussable in the context of a conversation about risks and how to manage them.

## TEAM AND GROUP WORKING

The word 'TEAM' is used to mean a group of people working together to achieve a common aim. Some academics suggest that this is a better definition for 'group', with 'team' being reserved for much closer relationships, such as that seen in a small military unit.

Being in groups is part of everyday life and many of us will belong to a wide range of groups, for example: family groups, social groups, sports groups, committees, etc.

In this section we will concentrate on groups that have been specially formed to fulfil some purpose, or groups that are a drawing together of people with shared experience. This type of group is often also referred to as a team.

## WHAT ARE GROUPS AND TEAMS?

There is some confusion about the difference between a group and a team. Traditionally academics, communication and management theorists use the terms: group, group-working, group-interaction, group-structure etc. to refer to the dynamics of people working together towards a common cause.

The word group however has a broader meaning – a group of passengers on a flight have a common characteristic – to travel, but they are not necessarily working towards a common cause. Groups do not even need to refer to people, for example, a group of products in a supermarket, in this case the group is arbitrary and could be defined by any number of variables.

A team is generally more specific. We would not refer to our airline passengers as a team unless they crashed on a desert island and needed to work together to survive. The distinction is that a team is working together for a common cause. A group of schoolchildren may be in the same class, whereas a team of schoolchildren may be working together on a specific project within the class.

When we talk about groups and teams, we use the terms interchangeably – it is possible to have a group without a team but not a team without a group. Although we use the word team throughout this section, we use the following definition of group:

A group is a collection of people with some common characteristics or purpose.

- A group can consist of any number of people
- People in groups interact, engage, and identify with each other, often at regular or pre-determined times and places
- The group members share beliefs, principles, and standards about areas of common interest, and they come together to work on common tasks for agreed purposes and outcomes
- People in groups are defined by themselves and by others as group members, in other words individuals are aware that they are part of a group

## TYPES OF GROUPS

Groups may be formal, brought together for a particular purpose, or they may be informal such as family groups, groups of friends or colleagues. You may come into contact or work with a range of different groups.

These types of group may include:

- **Work Groups:** Either formal i.e. teams, committees, training groups, or informal, i.e. setup to tackle an ad-hoc problem.

- **Neighbourhood Groups:** An example of a neighbourhood group would be one established to develop local amenities.
- **Social Groups | Special Interest groups:** These are groups established to meet the needs of a sector (e.g. age group, gender) or interests (e.g. music or sports). Examples include Women's Institute and Scouts
- **Self-Help Groups:** Such groups are often established to work through emotions or to provide support for people with a certain illness, e.g. helping to overcome an addiction such as Alcoholics Anonymous
- **Inter-Agency Groups:** These are developed between agencies/organisations that work in related fields to improve product and/or client services. In addition, they aid communication and establish joint ventures to prevent duplication and confusion
- **Pressure Groups:** The function of pressure groups is to challenge the status quo, often by using high profile tactics to gain media attention to achieve their aims

## TASK-BASED AND EXPERIENCE-BASED GROUPS

Groups can also be sub-divided in two ways:

- Groups established to carry out specific tasks are known as **task-based groups**, such as a pressure group.
- Groups which are based on the experiences of their members are known as **experience-based groups**, such as a self-help group.

The distinction between task-based groups and experience-based groups is important because it affects how the group is formed, organised, led and what roles the individual group members play.

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### TASK-BASED OR CONTENT GROUPS

This group focuses on the achievement of specific goals. The individual members of the group work towards completing these goals. They are common in organisations and include groups set up to work on specific projects – perhaps the design of a new product.

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### EXPERIENCE-BASED OR PROCESS GROUPS

This group focuses on the individual group member and how they interact, support, and grow together, an example would be a group established to support people suffering from stress.

## GROUP COMMUNICATION

When people are part of a group they interact and communicate in different ways to how they would on a one-to-one basis.

These differences include:

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## THE INDIVIDUAL MEMBER WITHIN A GROUP

Through networking within a group people come to a greater understanding about other group members and the wider environment. Seeing things from other people's point of view. Within a group situation, people often learn about who **they** are and their strengths and weaknesses.

Groups are important to personal development as they can provide support and encourage individuals to make changes in behaviour and attitude. Some groups also provide a setting to explore and discuss personal issues. A group setting can allow people to become more confident and learn new interpersonal, social, and practical skills through observation and practice. These skills can be developed within a group setting and then used in individual situations. As group membership can improve self-esteem and confidence, it can also improve self-motivation and the desire to learn and develop.

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## THE GROUP AS A WHOLE

From the experience of belonging to different groups, it becomes obvious that groups are often made up of individuals with different personalities, attitudes, and ideas. For a group to function well a bond needs to be developed so that individual differences can be used for the wider interests of the group. 'Cohesiveness' is the term used to describe this mutual bonding between members, with each having a strong sense of belonging to the group.

**Cohesiveness** is a measure of the success of the group. A group with more cohesiveness is more likely to keep its members than that of a group with little cohesiveness. Members of a high-cohesive group are likely to talk in group terms, using 'we' instead of 'I' when talking about group activities. The more cohesive a group the greater the sense of team spirit and the more individual members will cooperate with each other. A low-cohesive group may find that members frequently miss meetings; sub-groups or cliques may form within the original group and there is likely to be an underlying sense of frustration.

### IMPORTANT DEFINING FEATURES OF GROUPS:

- People can identify with each other, share ideas, beliefs and/or experience of common areas.
- People frequently and regularly engage with each other, agreeing on a purpose and working together on shared tasks.
- People recognise themselves and are recognised by others as part of a group.

### GROUP LIFE CYCLE

The nature of any group can change dramatically over time. There are a wide range of theories relating to group development and most assume that groups go through several stages – a life cycle.

The most influential model of group development has been that of Bruce Tuckman (1965). Many academics and practitioners working with groups have adopted versions of his model.

Given time, many groups will pass through at least some of the Tuckman's stages of group development. Not all groups will go through every stage. It depends on several factors and variables. How long the group will be together, how the group is structured, the aims and objectives of the group and the style of leadership and behaviour of others within the group.

#### Tuckman's Stages of Group Development

- **Stage One** - Group bonding (Forming)
- **Stage Two** - Group conflict and fragmentation (Storming)
- **Stage Three** - Group maintenance and the development of norms (Norming)
- **Stage Four** - Group working and achieving its aims (Performing)
- **Stage Five** - Group disbanding (Adjourning, sometimes referred to as Mourning)

#### STAGE ONE: THE ESTABLISHMENT AND FORMATION OF THE GROUP (FORMING)

At this initial stage, individuals in the group are brought together.

This can be a difficult time for people, as they begin to explore how to behave within the group. There is a great deal of individual exploration, with members of the group getting to know each other and discovering common interests. For some less outgoing members, this can be a very intimidating experience.

This initial stage in group forming is a perfect time to practise interpersonal skills such as building rapport and questioning. There are team-building exercises that can be used early in group formation to break the ice.

The role of the group leader during this opening stage is to encourage group members to find common ground. This will help individual group members to relax and feel more confident. There is a need to ensure that a balance is achieved between the more extrovert and the more introvert members of the group. The leader should aim for each individual member to feel that they have an equal status within the group.

Once group members feel that they know one another and common ground has been established, the aims of the group need to be agreed. The leader must focus the members on the aims and goals of the group. The norms of the group will begin to evolve at this stage, which is further characterised by the group's dependence on the group leader, who needs to establish the group's confidence and respect.

Developing group cohesiveness is important at this stage. Cohesiveness evolves as bonds within the group emerge and members begin to feel they belong. At this stage, there may be fears of 'not

belonging' or not 'fitting in'. To facilitate group cohesiveness and bonding, the group leader may try to prevent the group from forming sub-groups. Sub-groups may already be formed if some of the members of the group are acquainted.

From this initial stage, the group style is established.

Style refers to whether the group has a positive or optimistic outlook, whether it is supportive or antagonistic, whether it is serious or light-hearted. Once the style of the group is established, the group can be resistant to change at a later stage, therefore it is important that the leader steers the group towards a style that is best suited to meet the aims of the group.

### STAGE TWO: GROUP CONFLICT AND FRAGMENTATION (STORMING)

This stage is characterised by individuals within the group exerting themselves – being assertive.

Conflicts of power may occur, and members may challenge the role and authority of the leader. Individuals test and establish their roles, pushing boundaries to find acceptable medians - this can be a highly turbulent and volatile stage.

As tensions and conflicts between individuals arise, the group may lose focus of its original aims, this in turn may lead to cynicism, lack of enthusiasm and frustration - some members may withdraw or even leave the group.

The role of the leader is to encourage group members and refocus the group on its aims and the purpose of its existence. The group needs to make some sort of progress during this stage, to move forward and attain some feeling of success. This will increase group morale and reinforce the desire to belong, cohesiveness.

### STAGE THREE: THE DEVELOPMENT OF GROUP NORMS (NORMING)

After a period of conflict, groups tend to develop a greater cohesiveness, mutual trust, and a sense of belonging between members.

This is a period of negotiation - working out the group norms - and can be a positive and stable time, when members of the group begin to take on responsibility for the emotional and social well-being of the group. This activity is called group maintenance. From here on, the group can begin to centre its attention on the aims or tasks of the group.

### STAGE FOUR: THE WORKING STAGE (PERFORMING)

This is when the group will be most concerned with carrying out its aims and serving its purpose.

By now members will be working well together, with individual strengths and skills being recognised and utilised to their best advantage for the group's wider aims.

By this stage, the group should have reached a high degree of cohesion and trust, without which motivation is likely to be lower. Having developed a clear group identity and by each member recognising their roles, the group may become quite independent from the leader. Other members of the group might take on some of the leadership roles.

#### STAGE FIVE: THE DISBANDING STAGE (ADJOURNING/MOURNING)

Some groups have a limited life span. These include groups which come together during a training course, or pressure groups which are drawn together to achieve a specific aim.

If the group's objectives are met, there may no longer be a reason to continue. For many groups, this can be a time of sadness and mourning and often some members will be reluctant to see the group break up.

To help the group through this time, the leader may decide a definite ending date. A clear evaluation of the group's achievements will allow the group to end on a high note. Symbolic endings such as a party or a meal out are important ways of celebrating and recognising the group's life. Technology makes it a lot easier for members of disbanded groups to stay in touch e.g. email, social media and enable professional connections to be strengthened and friendships developed.

#### BUILDING GROUP COHESIVENESS

Working in groups is a key activity for people in most personal and professional settings. There are many different types of groups which can be broadly divided into two categories, depending on whether the task or the experience of the group is the central concern.

Groups are dynamic in both structure and process. Usually group cohesiveness and group norms develop to enable the group to achieve more than individuals would be able to on their own.

The aim of a group is usually to bring about some change, support, or insight into either the individual, the group, or the environment. Whilst groups may well encounter internal problems and conflict at certain stages, when they are working effectively groups provide a positive, supportive environment in which to develop and learn new interpersonal skills.

#### THE DEVELOPMENT OF GROUP 'NORMS'

One way in which a group becomes cohesive is through the development of group 'norms', that is the standards of behaviour and attitudes to which the group abides – the groups rules. All groups have a set of norms they may apply to everyone in the group or to certain members only. Some norms may be strictly observed, whilst others may be more flexible.

As a group develops, these norms help to minimise individual differences in personality. Norms operate at the group level rather than at the individual level. Group norms usually operate to maintain the group and preserve its integrity, rather than to check individual actions.

Group norms may be explicitly set out in a constitution. In this case, a new group member would be given a list of rules and regulations, aims and objectives. This is most likely to be standard practice in a long-standing group. Group norms evolve over a period and in newly formed groups, they are often unspoken or implicit. A new member of a group will gradually become aware of what the group norms are and will usually try to alter their behaviour to conform to the norms. One obvious group norm is the wearing of a uniform or having hair styled in a distinctive way – in certain groups it may be appropriate to wear a suit for example. If members conform to the identity and norms of that group, it shows that they belong.

When members habitually refuse to conform to the group norms, they may become marginalised within a group or in extreme cases, expelled. When disruptive members are not expelled, this may lead to the breakdown of the entire group or to a major restructuring of norms and values.

In well-established groups it may be appropriate to occasionally look at the norms from an objective point of view. Do the norms help the progress of the group? It may be discovered that certain norms hold back progress within a group and therefore should be examined. Do all group members understand the norms, are norms consistently broken?

These questions may lead to norms being listed in a formal way – a group constitution. If norms are consistently being broken, then perhaps they are not appropriate for the group.

## EXAMPLES OF GROUP NORMS

The following list gives examples of the type of norms you may expect when you join or set up a group.

Different groups with different membership and different aims and objectives will use different sets of norms.

- Meet at x venue and at x time
- Dress smartly but casually
- Begin and end on time
- Attend as many meetings as possible, minimum of 70%
- Listen carefully to the current speaker
- Do your homework; be prepared before the start of a meeting
- When speaking keep your point relevant and concise
- Do not use hostile or inappropriate language or body language
- Be polite and courteous
- Show respect to other members of the group and their ideas
- Work on the goals and objectives of the group
- Do not talk or hold side conversations whilst others are talking
- Turn off your mobile phone for the duration of meetings

## EFFECTIVE TEAM WORKING SKILLS

There are several roles that any one person can take on in a team.

According to Belbin's team roles these are:

1. **Shaper** – drives work forward and gets things done, has a clear idea of the desired direction of travel
2. **Implementer** – also gets things done, looking for ways to turn talk into action and generate practical activity
3. **Completer-Finisher** – focuses on completing tasks, and tidying up all the loose ends
4. **Coordinator** – manages the group dynamics, often in a leadership role
5. **Team Worker** – helps the team to work effectively by supporting personal relationships
6. **Resource Investigator** – gathers external resources and information to help the team
7. **Plant** – generates ideas and creative solutions, not all of them practical
8. **Monitor-Evaluator** – good at critically assessing ideas and proposals, and at making decisions
9. **Specialist** – brings expert knowledge to the group, not always necessary to effective functioning

Research shows that the most effective teams have someone who can take on each of the nine key roles. That does not mean that a team must contain nine people, as most people can take on two or even three roles at a time.

Teams that struggle to operate effectively tend to lack one or more of the nine key roles.

## TASK VS. PROCESS TEAM ROLES

Belbin's team roles can be divided into Task and Process roles.

- **Task** roles focus on 'what': the job in hand, and getting it done. The key 'task-focused' team roles are Shaper, Implementer, Completer-Finisher, Monitor-Evaluator, Plant and Specialist.
- **Process** roles focus on 'how', and particularly on the people involved. They include Coordinator, Resource Investigator, and Team Worker.

The most effective team-workers are those who can see what skills are available within the group and use their own skills to fill any gaps. People tend to be either task- or process-focused, rather than a mixture.

It is perfectly possible to learn to take on the other focus, **if you want to do so**, and this will make you a highly effective team member.

## KEY TASK-FOCUSED TEAM SKILLS

The skills which are needed to take on task-focused team roles include:

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### ORGANISING AND PLANNING SKILLS

Being organised is essential to getting tasks done.

If you do not know what needs to be done, and by when, it is hard to make it happen by your deadline. Shapers, Implementers and Completer-Finishers are all characterised by good organising skills and can usually be relied upon to put in place strong systems for managing projects well.

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### DECISION-MAKING

Being able to make decisions is crucial to moving things forward.

Although it may be important to take time to gather information to ensure that the decision is **right**, there may come a time when any decision is better than none.

Group decision-making often requires compromise, and sometimes a willingness to give up one's own point of view in favor of the group's shared decision.

Shapers and Monitor-Evaluators are both good decision-makers.

Shapers, however, tend to make their own decisions quickly and then may struggle to compromise.

Monitor-Evaluators tend to look for the right decision from the available evidence and may be slow to decide if there is a shortage of evidence.

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### PROBLEM-SOLVING

Task-focused people are often good at problem-solving, especially if the problem relates to the task.

Plants look for innovative ideas to solve the problem, and Implementers will turn ideas into practical action.

Shapers will see the 'big picture' and the plan, making sure that the solution to the problem does not result in a change of direction.

## KEY PROCESS-FOCUSED TEAM SKILLS

Process-focused skills tend to be about people, and about building rapport within the group and making it work cohesively and effectively. Those who take on process-focused group roles tend to have good interpersonal skills including:

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## COMMUNICATION SKILLS

Good Coordinators, Team-Workers and Resource Investigators are good at verbal communication, listening and questioning. They work hard to ensure that the group communicates well, helping to make sure that there are no misunderstandings or unexpressed difficulties between team members.

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## ABILITY TO BUILD RAPPORT

These people are also good at developing a sense of harmony within the group. They help to build rapport with others, creating a coherent team.

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## PERSUASION AND INFLUENCING SKILLS

One of the key areas of process skills is in persuading and influencing. If the group is to come to a shared decision, for example, several members may need to be persuaded of the merits of a course of action.

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## FACILITATION SKILLS

Managing a process is basically about facilitating it or making it easier. Good facilitation skills are therefore vital in team-working. It is not only a skill for managing workshops.

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## FEEDBACK SKILLS

Giving and receiving feedback well is essential in any team-working situation. Being able to give clear and effective feedback to others is vital to keep the group process running effectively, and to plan. It also helps to ensure that you do not get irritated and angry with the way that others are behaving. It follows that you also need to be able to receive feedback gracefully, and then act on it calmly.

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## SKILLS IN CHAIRING MEETINGS

Group work often involves meetings, whether those are committee meetings or much bigger and more formal meetings. Skilled Coordinators often have highly developed skills in chairing meetings and use them in small and large groups alike.

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## CONFLICT RESOLUTION

Finally, you need to recognise that there may be situations when you need to deal with difficult people or situations, or even resolve a conflict.

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## IN CONCLUSION

It is important to remember that all team-working situations are fundamentally about working with other people.

If you have good interpersonal skills and are open to receiving feedback and improving them as a result, then you will become, and be, a good person to work with in a team. It truly is as simple as that.

## STRENGTHS AND WEAKNESSES OF GROUPS

There can be both strengths and weaknesses to working in groups.

These strengths and weaknesses will vary according to the purpose, structure, and nature of the group. Strengths and weaknesses will also change over time as the group evolves and in relation to other dynamics which the group encounters.

The following list of group strengths and weaknesses is generic and cannot be complete:

### POSSIBLE GROUP STRENGTHS

- Through group cohesiveness, a group's members can gain a sense of belonging, respect, and trust
- A group is not dependent on the skills of one person. In a group it is possible for an individual to take on different roles. Each role will reflect how individual skills and responsibilities change with time
- Because skills, experience and knowledge are pooled, there are greater resources to be drawn upon
- Groups can support individuals, share problems, and provide mutual help and encouragement. Groups give the opportunity for individuals to talk to others with similar problems and share their experiences
- A group can be a safe environment to bring about individual understanding and development. Because individual behaviour, feelings and attitudes are greatly influenced by other people, group members can provide role models and reinforcement through mutual support and positive feedback
- People may feel less isolated and intimidated than in a one-to-one situation. Shared workload and support networks

### POSSIBLE GROUP WEAKNESSES

- It may be difficult to maintain confidentiality within a group
- Some individuals do not like being in a group situation and they may not wish to express problems or share ideas with others in a group setting. Such people may become disruptive or withdraw
- Individuals may resent the pressure to conform to the group's norms
- Group labels can lead to stigmatisation and to overcome this, some groups are renamed e.g. renaming the 'Alcoholics Support Group', to 'The Cafe Society', may change outsiders'

perceptions of the group. Whilst the new name may be less socially stigmatised, such anonymity can lead to outsiders not knowing the group's role

- Organising a group needs resources, accommodation, time, and on-going commitment

## COLLABORATION OR WORKING TOGETHER

Collaboration, in its simplest form, means working together. It is a term that is used in business for teams or individuals working on a common project, or with a common purpose. Beyond business, it is often used to express the idea of individuals with different skills working together towards a shared aim.

The term collaboration often refers to the use of technology to support sharing of documents, images, and ideas. Well-known platforms to support collaboration include Zoom, Skype, and Slack, but there are many more. These platforms are only tools to support ways of working: they cannot of themselves create collaboration.

## WHAT IS COLLABORATION?

Collaboration is working together to create something more valuable than either or any of you could create alone. In other words, by working with other organisations or individuals, either competitors or those in your supply chain, you can add more value for your customers.

### Why Collaborate?

The main purpose of collaborating is to achieve something that neither of you could achieve alone.

It is particularly useful where you both (whether organisations or individuals) need to achieve the same thing, but you have quite different talents and resources available. You could both buy in the missing skills and talents—but by working together, you avoid having to spend more, and it is a win-win solution.

Collaboration has become more important in recent years because both organisations and individuals have been encouraged to specialise. When you have more specialist skills, you are more likely to need others to fill in gaps in your skill set. It is also especially helpful when solving problems, because a broader range of backgrounds can often lead to better solutions.

## STARTING TO COLLABORATE

Research shows that collaboration is likely to be most successful where individuals have very clearly defined roles and responsibilities. This means that they can work independently on significant parts of their work. This fits well with the idea of collaboration as bringing together people with diverse skills for their individual contribution.

There are several skills that are essential or useful when collaborating with others.

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## STRONG COMMUNICATION SKILLS

It does not matter whether you are working remotely or face-to-face: communication skills are essential. You need to be able to listen effectively and get your own message across in speaking or writing. Without this, your collaboration will be ineffective.

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## REMOTE COLLABORATION AND COMMUNICATION

There are some very particular issues associated with remote collaboration, and especially communicating either in writing via shared platforms or in video-conferences.

For example: it is much harder to see visual communication, such as facial expressions and body language via video conference (and impossible to do so in writing). You need to emphasise the non-visual elements, such as tone of voice and the words you choose.

It is much easier to switch off, especially in big groups when communicating remotely. Try to make video conferences as short as possible to avoid fatigue.

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## EMOTIONAL INTELLIGENCE IS HELPFUL IN ASSESSING PEOPLE'S FEELINGS, INCLUDING YOUR OWN

Working together, both in person and remotely, needs some degree of ability to understand and respond to both your own and other people's feelings. People with good emotional intelligence tend to fit well into groups and find it easier to work with others.

They can also help group situations to run more smoothly. They are therefore vital to facilitate collaboration, especially if others in the group lack this skill.

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## PROBLEM-SOLVING AND DECISION-MAKING SKILLS

It is fair to say that many collaborations are established to solve problems.

Decision-making is generally much harder in a group setting, such as a collaboration. It can therefore be helpful to have people with good decision-making skills involved, because they can facilitate better group decisions.

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## BEING ABLE TO RESOLVE CONFLICTS EFFECTIVELY IS ESSENTIAL WHEN WORKING WITH OTHERS

It is almost inevitable that there will be some element of conflict in any interpersonal relationship. When there are more people involved in a collaboration, conflict is more likely to arise. It is also true that with more experts and specialists involved, conflict also becomes more likely, because each has their own (fully justifiable) reasons for their opinions.

## GROUPS AND TEAMS

Before starting to collaborate with anyone, it is also helpful to understand more about the way that people behave in groups and teams. As discussed earlier, Belbin noted that people tend to take on specific roles such as group facilitator, task leader, and ideas generator. He also noticed that the most functional groups tended to have at least one person taking on each role. Each person could take on more than one role, but if any of the roles was unrepresented, the group tended to be less likely to achieve its goals.

## A FINAL THOUGHT

Collaboration has become a fashionable term in recent years, but there is nothing new about working together with others to achieve a common aim.

Collaboration is something that we are quite good at doing. It is something we must work on to ensure that we do not damage relationships with some people in building stronger relationships with others.

## GROUP ROLES

The word 'role' refers to how a person will behave and what function they will perform within the group.

Group roles are not necessarily static – people may adopt different roles at different times during the group's life cycle. The role of the leader or facilitator will change and evolve as group dynamics change over time.

## LEADERSHIP/FACILITATOR ROLES

The term '**facilitator**' is sometimes used rather than leader. The role is often not so much one of directing, it is more enabling the group to achieve its aims. In many groups, the leader may eventually take a back seat, handing over the leadership role to other members of the group.

There are many different theories of leadership and people have tried to describe leaders in different ways. White & Lippett identified three styles of leadership: autocratic; democratic; and laissez-faire in 1960. These styles are still used today to define different leader types. Different styles of leadership may be appropriate at different stages in a group's development. Different people with different personalities will adopt different leadership styles – some may be more appropriate than others at any given time. Leaders may change their style and/or adapt a style that encompasses more than one of the styles listed here:

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## AUTOCRATIC

**The Autocratic leader takes full control of the group and dictates what will happen** – the direction of the group and the steps needed to complete the aims and objectives. Autocratic leaders tend to praise and criticize individuals with the group, rather than the group. Although very much in control of the direction of the group the autocratic leader will tend to distance themselves from the actual work of the group after having told the group what to do.

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## DEMOCRATIC

**The Democratic leader runs the group as a democracy**, giving choice whenever possible and appropriate. The democratic leader will allow group members to decide how they wish to work to best complete the aims and objectives of the group. The democratic leader is more likely to be present in the group, offering advice and alternative ways of accomplishing a task when appropriate.

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## LAISSEZ-FAIRE

**The Laissez-Faire leader is very laid back in their approach.** Laissez-Faire leaders give complete freedom to individual and group decisions and rarely make suggestions or attempt to direct the group in any way. Although happy to help with advice and supply information the laissez-faire leader will only do so when asked. It could be argued that the laissez-faire leader does not lead at all, in the traditional sense of the word. They are often a figure-head with expert knowledge that can be called upon if needed by the group.

Fred Fiedler developed the Contingency Theory of Leadership in 1967, suggesting that when a group situation is highly favorable or unfavorable to the leader a **task-oriented approach** is more effective. When a group situation is only moderately favorable to the leader then a **relationship-oriented style** is more appropriate.

There are two basic types of task leadership and group maintenance leadership:

- **Task Leadership Roles** usually include giving and seeking information from the group, asking the opinions of all group members, keeping the group energised, evaluating performance and giving direction to the group.
- **Maintenance Leadership Roles** usually include encouraging engagement of group members, relieving any tensions that form within the group, building rapport, trust, and respect, resolving conflict, and drawing people into the group – increasing cohesiveness.

Groups often require both types of leadership, as individuals within the group tend to fall into one of the two categories, i.e. they are either more task or relationship (maintenance) orientated. Some leadership roles may need to be taken by other members of the group to compensate for this mismatch in psychology.

## TEAM ROLES

To understand how a group operates it is necessary not only to look at the role of the group leader but also at the roles of the individual members of the group.

We use the word 'role' in this context to describe how people behave, contribute and relate with others, in other words we attempt to categorise personality types so that strengths and weaknesses can be identified and recognised amongst the group members.

Meredith Belbin's work on Team Roles or Functions is often used to investigate how individuals behave or what functions they perform in a group.

**Belbin identifies nine group roles, or clusters of behaviour.** These roles have been categorised as either function (or task-oriented) or cerebral (people-oriented), fitting with the task and relationship roles of leadership as described above.

Belbin's team roles are:

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### SHAPER

The Shaper is a dynamic, outgoing member of the team; they are often argumentative, provocative, and impatient.

These traits may mean that they cause friction with other, especially people-oriented, members of the group. Due to the personality of the Shaper they push the group towards agreement and decision making, keen to remove barriers and embrace challenges.

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### IMPLEMENTER

Implementers get things done – they have the ability of transforming discussions and ideas into practical activities.

Implementers are conscientious, wanting things to be done properly. They are very practical and organised in nature hence their ability to get the job done. Implementers can be stuck in their ways, not always open to new ideas and way of doing things. Implementers would rather stick to old, tried, and tested methods than to embrace change and innovation.

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### COMPLETER-FINISHER

The Completer/Finisher is a task-oriented member of the group and as their name implies, they like to complete tasks.

The Completer/Finisher can be an anxious person worried about deadlines and targets – they are perfectionists and have good attention to detail but also worry about delegating tasks. They would

rather do something themselves and know that it was done properly than delegate to somebody else.

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#### COORDINATOR/ CHAIRPERSON

The Coordinator is often a calm, positive and charismatic member of the team.

Coordinators take on leadership or chairperson roles by clarifying goals and objectives, helping to allocate roles, responsibilities, and duties within the group. The Coordinator has excellent interpersonal skills, being able to communicate effectively with team members through good listening, verbal, and non-verbal communication.

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#### TEAM WORKER

The Team Worker helps by giving support and encouragement to the other members of the team.

This team-oriented member is concerned about how others in the team are managing. Team Workers have sensitive, outgoing personalities and are happy to listen and act as the team counsellor.

Team Workers are usually popular members of the team, able to effectively negotiate and work towards the good of the group. Team Workers can be indecisive in group decisions – torn between the welfare of members and the ability of the team to deliver.

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#### RESOURCE INVESTIGATOR

The Resource Investigator is a strong communicator, good at negotiating with people outside the team and gathering external information and resources.

Resource Investigators are curious and sociable in their nature they are open to new ideas and ways of accomplishing tasks. Being flexible, innovative, and open to change, Resource Investigators are listened to by other team members. Sometimes they are unrealistic in their optimism.

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#### PLANT

The Plant is an intellectual and individualistic member of the team.

The Plant is innovative and will suggest new and creative ways of problem solving within the team. Sometimes the ideas of the Plant may be impracticable due to their highly creative nature – they may ignore known constraints when developing their ideas. Plants are often introverts who may have poor communication skills, they are loners and enjoy working away from the rest of the group.

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## MONITOR EVALUATOR

The Monitor Evaluator is unlikely to get aroused in group discussions – they tend to be clever and unemotional, often detected from other members of the team.

The monitor evaluator will critically evaluate and analyse the proposals, ideas, and contributions of others in the team. Monitor Evaluators carefully weigh up advantages and disadvantages, strengths and weaknesses of ideas and proposals and therefore are good decision makers.

Monitor evaluators are keen critical thinkers.

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## SPECIALIST

The Specialist has expert knowledge in some area that is vital to the success of the group.

The specialist provides knowledge and skills in this narrow area. Dwelling on practicalities in their expert area the Specialist may have problems applying their expertise to the wider goals of the team. Specialists tend to be single-minded and professional.

## SUMMARY OF GROUP ROLES

It is perfectly possible for people to adapt to different team roles at different times. Although you may recognise your personality type in the descriptions above you will almost certainly adopt different roles in different scenarios. Team roles often become more prevalent when a team or group has had time to reach maturity and develop cohesiveness.

## DIFFICULT GROUP BEHAVIOURS

There are several distinct types of 'difficult behaviour' which can occur in group situations. Some of the most common being conflict, non-participation, or withdrawal, monopolising and scapegoating.

The level of success of a group will, ultimately, depend on the level of cohesiveness within the group - how well the group members interact and get along with each other.

By recognising, understanding and minimising disruptive group behaviours group work becomes more effective and productive.

## CONFLICT

Disagreements within groups are common and often a healthy way of building cohesiveness, this is because if people disagree on a particular point they will have the opportunity to explain why and perhaps offer alternative solutions to the problems of the group.

Conflict and further discussion can be a good way of reflecting and clarifying the aims and objectives of the group and can enhance understanding by taking in the viewpoints of all group

members. Conflict only becomes a problem when comments become personal, towards an individual or sub-group of individuals, or discussion takes up too much time to the detriment of the group's purpose.

Strong group leadership and cohesiveness will enable disagreements to become positive for the group and the individuals within it. The following example describes how to prevent disagreement leading to more serious problems which may be disruptive to the group.

An individual in a group may challenge what is being said by the leader or by other group members. This can lead to disruption within the group, affecting the progress and overall emotional state of the other members. Any sort of challenge or disagreement needs to be discussed openly if there seems to be a valid reason for it. The person in disagreement should be encouraged to express their views in a positive way with the rest of the group. If the situation cannot be resolved in the group setting, the leader or facilitator may wish to discuss the issues which concern the individual away from the rest of the group. Alternatively, the disagreement could be dealt with at a specific time and discussed by the group, so that the group negotiates some form of resolution.

Conflict resolution in groups will depend, in part, on the leadership style and team roles of the group members.

#### NON-PARTICIPATION OR WITHDRAWAL

Everyone has the right not to participate within the group, although it is usually preferable for all members to contribute.

Some members will prefer to observe rather than to participate vocally and others may wish to contribute but feel too shy, fear self-disclosure, or lack confidence. To overcome lack of self-confidence, where members wish to contribute but fear to do so, their non-participation needs an encouraging, positive approach, however, they should not be embarrassed or pressured to participate.

Some group members who are withdrawn may just take longer to warm to the group situation and to open. Over time, group members who were initially quite extrovert may listen more and say less, whilst those who said little initially may begin to say more, which will lead to more balanced contributions.

#### MONOPOLISING

There may be times when one person in the group has a lot more to say than others.

This may be the case, for example, if one member has a focused area of expertise which needs to be shared with others. Monopolising refers to one or two members dominating the group at the expense of other members' contributions.

Monopolising can lead to resentment from others in the group, feeling that they do not have the opportunity to make their points.

The leader or facilitator may reduce this problem by first acknowledging what the person must contribute and then diverting the discussion to other people, asking their opinions, and moving on. In situations that cannot be resolved in a group situation, the best strategy may be to discuss the problem with the individual concerned, in a way that is sensitive and positive and does not dampen their spirits and future contributions altogether.

## SCAPEGOATING

When things go wrong in a group situation it is sometimes easy to direct blame at one or more individuals within the group, this is known as 'scapegoating' and can be very damaging for the individual concerned and for the group.

The person may be rejected by the group and become a target for anger, frustration, and ridicule by other members. Such behaviour may lead that member to withdraw, especially if they are unwilling or unable to defend themselves. Everybody makes mistakes and we all fail sometimes; scapegoating can be comparable to bullying and most detrimental to the self-confidence of the victim.

If the group has failed because of one person then a more appropriate way of handling the situation would be for the person concerned to have a private discussion with the group leader. Often the point of a group is to pull together and support each other – the whole group may be to blame for assigning inappropriate tasks to an individual or not providing adequate support.

In cases of scapegoating, the group leader or facilitator could restructure the group into sub-groups for a period, to reduce the effect of the whole group scapegoating one individual. Interpersonal interactions may be structured differently in a smaller unit and may help to rebuild the confidence of members. Restructuring may also alter the dynamics within the group once it has been fully reformed at a future time.

## ADDITIONAL PROBLEM AREAS

Many other issues may arise within groups, from a general negativity to specific problems such as irregular attendance, aggressive behaviour or arguments.

The coping strategies of the facilitator or leader will depend on the composition of the characteristics of the group e.g. their age, abilities, motivation, and emotional state. Problems can often be resolved by:

- Clear guidelines as to the 'rules' or 'norms' of the group. Many formal groups will negotiate and agree on these rules at an early stage

- Positive feedback being given to individual contributions, both from the group leader and other group members
- Where problems do arise, their cause needs to be clearly understood

Overcoming problems within a group can improve the group's overall cohesiveness and mutual trust.

## LEADING VIRTUAL TEAMS

A virtual team is a group of people that work together on common goals and projects but do not sit together, and so communicate electronically rather than face-to-face – although they may occasionally meet in person.

Virtual team members are sometimes homeworkers located in neighboring towns but often they are based in offices across borders and continents.

Virtual team working is challenging, and it is often quoted that 50% of virtual teams fail to meet their objectives. When virtual teams do meet their objectives they very often do not want to work together again.

You might assume that if you have led teams before you will be able to manage a virtual team without any problem but it takes a highly skilled team leader to be able to build, manage and maintain a successful virtual team. You will need all those skills you developed when managing face-to-face teams – and a whole lot more.

The absence of those informal opportunities to collaborate or those water cooler moments where colleagues share a joke and build rapport means that it is much harder to build trust and create a sense of common purpose and engagement in virtual teams. The virtual manager needs to dedicate more time, energy, and resources to establishing good relationships throughout the team, not only between themselves and the rest of the team but also between colleagues.

The following are some of the skills that are needed to lead a virtual rather than a co-located team.

## TRANSPARENT COMMUNICATION

Excellent communication skills are essential for virtual team leaders who do not have the luxury of face-to-face communication but instead must rely much more on text or voice only communication.

Without the benefits of non-verbal signals, it can be much harder to interpret the real intention of what is being said and know what the speaker is really thinking. As a virtual team manager, you must ensure that your communication is clear and unambiguous and that you make sure not only that you fully understand your team but that you are understood yourself.

Tips for virtual communication:

- Communicate regularly and frequently but do not overload your team with information. Exceptionally long emails or online meetings should be avoided
- Make time for regular one-to-one communication with individual team members as well as group emails and meetings. Picking up the phone to see how someone is doing is usually appreciated and is certainly the best method if you have something sensitive to discuss
- Paraphrase and summarise when you are giving complicated instructions and check back that you have been understood
- Particularly with new team members, be wary of using jargon or acronyms that they may not understand
- Listen attentively and be ready to read between the lines. Ask the right questions to check that you have understood

## PATIENCE

Working virtually is challenging. Technology can let you down, response times may be longer if you are working across time zones and a lack of face-to-face communication can make it so much harder to interpret the real message.

You may also have language and cultural barriers to manage. Particularly in the early stages of your virtual team, you are going to have to flex your patience muscle: things will take longer, interpersonal irritations and upsets may well occur, people won't always say what they really think, meetings won't always go to plan and you will need to remain positive and focused on achieving your goals.

## RAPPORT-BUILDING

Virtual teams risk losing the human element of the workplace and so their leaders need to be highly skilled in building relationships and creating good rapport with their team members.

Make sure you allow time for the team to get to know a little more about each other's personal lives and factor in a few minutes small talk at the start of meetings. Do not be afraid to share a joke. Remember that your team are human beings so from time to time check in on how they are feeling as well as what they are doing and engage sensitively when a team member is experiencing personal or professional challenges.

A regular quarterly or even annual face-to-face meeting will help enormously to build positive team relationships. Do make sure you use any face-to-face time wisely and focus on team-building activities rather than on updates and reporting that can just as easily be done at a distance.

## RESULTS-FOCUS

All team leaders need to focus on results but one of the challenges of managing a virtual team is that you can't see what people are doing or monitor their performance in the same way and so you can only really manage, measure and reward based on outcomes and results.

When managing virtual teams, it is crucial to have clear individual accountabilities in place with agreed methods of monitoring and measuring performance.

## INTERCULTURAL SKILLS

If you manage a virtual team the chances are that it is also an international team with members located across cultures and time zones.

This means you will need to navigate values, communication styles and working preferences that may be at odds with your own or with other team members'.

Virtual team leaders need to manage multiple perspectives and decode different cross-cultural styles so that they can get the best from their individual team members and maximise the diversity of the team.

Be prepared to listen and learn about other cultural norms and move beyond nationality stereotypes. If colleagues in one location never seem to deliver on time, do not jump to conclusions but consider how milestones and deadlines are managed, how much support they are getting and if instructions are clear and accessible.

If another colleague rarely contributes during online meetings, think about how the meeting is managed, if more materials could be circulated ahead of the meeting, and whether they need additional language support – and make sure you make time to speak to them one-to-one.

## TECHNOLOGY SKILLS

Virtual teams rely on technology to interact with each other and share information and as the team manager you need to lead by example and demonstrate excellent technical skills.

You want to be able to select the right tools and platforms for your team and match each task or interaction type to the most appropriate mode of communication. As team leader you should be a competent user and be able to stay calm and trouble-shoot when technology lets you down.

Select a relatively small number of tools that can be used regularly and consistently but also be aware of how individual team members prefer to communicate. You might find you get a faster response from some colleagues by using an Instant Chat function while others prefer the human contact of a quick Skype call.

Virtual team managers need to consider how they adapt and expand their skills to adjust to the lack of human interaction – they need additional skills but they also need to be aware of how and when they use the skills they have.

Successful virtual leaders and project managers are going to be in demand!

## PLANNING AND STRUCTURING EFFECTIVE MEETINGS

People attend meetings for a wide variety of reasons, including work, personal interests, and leisure activities.

Most people will have to participate in meetings at some point in their lives, and many people do so on a regular basis.

Meetings can take place at work, within an organisation, a sports group, a Parent Teachers Association, church group or one of many other committees.

Some meetings leave the participants feeling they have wasted their time as little has been achieved and this can be due to many reasons. In this section we are going to look at the reasons why meetings may be less successful and provide help and advice to enable you to get the most out of the meetings you are involved with.

## WHAT IS A MEETING?

A meeting is the coming together of three or more people who share common aims and objectives, and who using verbal and written communication contribute to the objectives being achieved.

## THE PURPOSE OF MEETINGS

Meetings are an important organisational tool as they can be used to:

- Pool and develop ideas
- Plan
- Solve problems
- Make decisions
- Create and develop understanding
- Encourage enthusiasm and initiative
- Provide a sense of direction
- Create a common purpose

While meetings may differ in size, content and approach, effective meetings all have the following three elements in common:

1. A distinctive purpose or aim
2. Use of effective communication
3. A controlled situation

## COMPONENTS OF MEETINGS

A meeting can be divided into the following three main components:

**Content** is the knowledge, information, experience, expertise, opinions, ideas, attitudes, and expectations that individuals bring to a meeting.

**Interaction** is the way in which the participants work together to deal with the content of a meeting. This includes the feelings, attitudes and expectations of the participants which have a direct bearing on co-operation, listening, participation and trust.

**Structure** is the way in which both the information and the participants are organised to achieve the purpose/objectives of the meeting.

## TYPES OF MEETINGS

There are many different types of meetings. Meeting are to:

- Inform
- Consult
- Solve problems
- Make decisions

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### INFORMING MEETINGS

These are the most straightforward meetings where one member, usually the chairperson, has information or a decision which affects all those present, which he/she wishes to communicate. Such meetings tend to be formal as their aims are to give the members a real understanding and to discuss any implications or how to put such information to best use.

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### CONSULTING MEETINGS

These are meetings used to discuss a specific policy or innovation and can be used to get participants' views of such a policy or idea. An example could be:

- Review a current policy
- State its deficiencies

- Suggest change
- Stress the advantages of such change
- Admit any weaknesses
- Invite comments

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### PROBLEM SOLVING MEETINGS

These meetings are dependent upon the chairperson describing the problem as clearly as possible. Members should be selected according to their experience, expertise or interest and then given as much information as possible to enable them to generate ideas, offer advice and reach conclusions.

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### DECISION MAKING MEETINGS

These types of meetings tend to follow an established method of procedure:

- Description of the problem
- Analysis of the problem
- Draw out ideas
- Decide which is best
- Reach conclusions

Many organisations hold regular meetings to enable members to report and discuss progress and work in hand, to deliberate current and future planning. Such meetings can contain elements of each of the four above examples.

### PLANNING AND PREPARATION FOR A MEETING

Of prime importance for the success of any meeting is the attitude and leadership of the **chairperson**. In a meeting, the chairperson is the leader and performs the same function as the leader of any working group.

For a meeting to be effective, the chairperson:

- Plans, organises and controls the discussion of subjects on the agenda
- Maintains the group by encouraging and developing harmonious relationships
- Motivates the individuals by encouraging all to contribute, rewarding their efforts and supporting them in any difficulties

Before any meeting, the chairperson should ask and resolve the following questions:

- What is the purpose of the meeting?
- Is a meeting appropriate?

- How should the meeting be planned?
- Who should attend the meeting?
- What preparation is required for the meeting?

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#### WHAT IS THE PURPOSE OF THE MEETING?

All meetings must have a purpose or aim. The chairperson must ask the following questions:

- What is to be achieved by this meeting?
- Is advice required on an issue?
- Has a problem arisen that needs prompt discussion?
- Is this a regular meeting to keep members 'in touch'?

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#### IS A MEETING APPROPRIATE?

The chairperson should always consider whether a meeting is necessary or if some other means of communication is more appropriate. For example: memos or emails targeted to individuals inviting comment. Meetings that are Unnecessary waste time, lead to frustration and negativity and may lower motivation to participate in future meetings.

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#### HOW SHOULD THE MEETING BE PLANNED?

This will very much depend on the type of meeting to be held. There should be some rationale behind every meeting, no matter how low-level or informal, and this will largely dictate the content and indicate how planning should proceed.

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#### WHO WILL ATTEND THE MEETING?

This is often decided by the nature of the meeting itself. In a small organisation, a meeting could well include all members of staff, whereas a working party or committee meeting will already have its members pre-determined. In a large organisation or department, staff attending might well be representing others. It is important that the full implications of such representation are realised by the individuals concerned as they are not merely speaking for themselves. Meetings outside the workplace may include members of the board of directors or other interested parties.

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#### WHAT PREPARATIONS ARE NEEDED FOR THE MEETING?

If maximum contribution is to be needed from all participants, the purpose of the meeting should be recognised by all. The agenda should be circulated beforehand to all those invited to the meeting. The agenda should:

- Give the time and place of the meeting
- List the topics to be covered, indicating who will introduce them

- Have any relevant papers attached
- Give the time the meeting will close

**The Agenda:** This is the outline plan for the meeting. In most formal meetings it is drawn up by the administrative professional in consultation with the Chairperson. The administrative professional must circulate the agenda well in advance of the meeting, including any accompanying papers and request items for inclusion in the agenda.

Regular meetings often start with the minutes from the last meeting followed by '**matters arising**' which forms a link with what has happened in the previous meeting. Most meetings conclude with 'any other business' (AOB) which gives everyone the opportunity for any genuine last-minute items to be raised. More formal meetings may have AOB items listed on the agenda.

An example of an agenda might be:

- Apologies for absence
- Minutes of last meeting
- Matters arising (from minutes of last meeting)
- Item 1 - Training & Development
- Item 2 - Report on Funding
- Item 3 - Finance & Equipment
- A.O.B. (Any Other Business)
- Time and date of next meeting

If appropriate preparations have been made, then the scene is set for an effective meeting.

Agendas will have been produced and circulated. Participants will arrive knowing what is to be discussed and with sufficient background information to make relevant contributions. If appropriate, they will have consulted with people they represent and discussed any pertinent issues.

## THE ROLE OF THE CHAIRPERSON

In a more formal meeting, the chairperson will outline the purpose of the meeting and remind members why they are there.

In such a meeting there is little need to refer to this procedure as this is implicit in the established etiquette, namely:

- The chair controls the meeting
- All remarks are addressed through the chair
- Members do not interrupt each other
- Members aim to reach a consensus
- A vote is taken if consensus is not reached

- The majority wins the vote
- All members accept the majority decision

This is **one model**, but alternative models may be adopted.

When discussion is underway, it is the chairperson's responsibility to ensure that it continues to flow smoothly by involving all members present and by not permitting one or two people to dominate the meeting. Summarising by the chairperson during meetings can:

- Indicate progress, or lack of
- Refocus discussion that has wandered off the point
- Conclude one point and lead into the next
- Highlight important points
- Assist the administrative professional if necessary
- Clarify any misunderstanding

The chairperson should *pace* the meeting, ensuring it runs to time. If the planning has been properly executed, this should not prove to be a problem.

At the end of a meeting, the chairperson should remind members what they have achieved and thank them for their contributions. Finally, the time and date of the next meeting should be arranged. This is one common model for effective meetings, successful outcomes can be achieved in different ways with different strategies for different purposes, so adapt as appropriate to specific situations.

## THE ROLE OF THE MEMBERS

While it is the role of the chairperson to run the meeting, the participation of all members is also fundamental to the success of the meeting.

To ensure an effective meeting, all participants should:

- Undertake any necessary preparation prior to the meeting
- Arrive on time
- Keep an open mind
- Listen to the opinions of others and participate
- Avoid dominating the proceedings
- Avoid conflict situations
- Avoid side conversations which distract others
- Ask questions to clarify understanding
- Note down any action agreed upon
- After the meeting, undertake any agreed action and brief others as appropriate.

## WHY MEETINGS MAY BE INEFFECTIVE

There are many reasons why meetings are not effective, some of these include:

- **The meeting is unnecessary** and revolves around discussion of trivial issues, wasting members' valuable time
- **The meeting lacks a clarity of purpose**, i.e. the aims and objectives are not clearly defined
- **Inappropriate style of leadership**, i.e. the chairperson dominates and ignores or disregards other contributions
- **The chairperson exercises little control** and allows one or two members to dominate the proceedings
- **The meeting is too large** thereby limiting the flow of discussion and preventing all members being able to contribute
- Decisions emerge that are not truly representative
- Problems are talked about rather than being talked through
- Decisions are delayed or not acted upon
- No clear-cut decisions are made
- **Minutes are inaccurate** or seen as being manipulated by the chairperson or secretary for his/her own purposes
- **The wrong people are present**, thus preventing the meeting proceeding effectively, e.g. those present must refer to another person and are therefore unable to comment effectively

## SUMMARY

There are many types of meetings and many reasons why meetings may be ineffective.

For meetings to be effective, participation is required from all those present. The key skills of interpersonal communication and listening are important.

To ensure the success of a meeting, good preparation is essential, and the role of the chairperson is paramount. If these conditions are met, then all participants should leave the meeting feeling a sense of accomplishment, not as if their time has been wasted.

## REMOTE MEETINGS AND PRESENTATIONS

In early 2020, coronavirus changed the way that many people worked. Out went face-to-face interaction, and in came remote meetings and working from home. Big conferences and events were cancelled or became virtual, almost overnight. We suddenly had to learn new skills in attending and presenting at remote meetings.

For many people, this has been a huge opportunity. It has meant not having to travel for work, removing stress. Some may have been asking to work remotely for some time, and have embraced this experience, and the additional flexibility it has offered.

It seems unlikely that we will ever fully return to a world where we only hold business meetings face-to-face, or where so many people work from offices in the centre of cities. We were already edging towards an understanding that not all business travel was necessary. This means that knowing how to run and present at remote meetings and conferences has now become an essential skill.

## HOSTING, ATTENDING AND PRESENTING

There are three main roles during remote meetings: hosting, attending, and presenting.

- **The host** is the person who ‘owns’ the meeting: who sets it up, controls the attendees’ ability to speak or participate, and ends the meeting. They will also decide on the platform being used for the meeting (see box).
- **The attendees** include everyone attending the meeting. They may watch and listen, or actively participate.
- **Presenters** are those making a presentation at a meeting.

## HOSTING REMOTE MEETINGS

The host has considerable power in a remote meeting—like the chair in a face-to-face meeting. They get to choose the software to be used and control who speaks at any time.

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## SOFTWARE FOR REMOTE MEETINGS

There is a range of software and apps available for running remote meetings. Some popular options include Skype, Zoom, and Google Hangouts Meet.

All these have advantages and disadvantages.

As host, it is important to:

- **Choose an app that you are comfortable using.** You need to know about the security options, and how to shut it down if anything untoward happens and you are ‘gate-crashed’ in any way.
- **Ensure that everyone else knows what you will be using, and how to use it.** If necessary, supply a guide or weblink so that people know how to access the software, and can download it ahead of time.

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## THE HOST ALSO SETS THE RULES FOR THE MEETING.

These may be set out by the organisation, especially in a work situation. It is up to the host to remind everyone of expectations beforehand. In the invitation email, they should set out any rules about

dress code or other restrictions. These might include, for example, not using a bedroom for a video conference, or asking everyone to keep their microphones muted unless they have been asked to speak.

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#### IT IS IMPORTANT TO REMEMBER THAT REMOTE MEETINGS ARE HARDER ON EVERYONE'S CONCENTRATION THAN FACE-TO-FACE.

Everyone is having to work harder to pick up body language and other non-verbal clues, so it is much more tiring to attend remote meetings. As host, **try to keep the meeting short.**

There are things that you can do to help with this. For example, you can ask the meeting attendees to tell you if they have an interest in one agenda item, so that you will know to ask them to speak on that. This avoids having to wait for visual cues.

#### ATTENDING REMOTE MEETINGS

There are a few issues to consider before attending remote meetings for all attendees, including the host and any presenters. These include:

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##### CHOOSING A SUITABLE LOCATION

You should choose a quiet room, away from the rest of the family. It also needs to have a decent internet connection. Avoid anywhere too far from the wireless router unless you have plenty of boosters around the house. You also need to think about where you are going to sit. It is better to have natural light, but NOT directly behind you, as this makes it more difficult to see your face.

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##### A WORD ON BACKGROUNDS

It is worth thinking about what is behind you in the camera shot because everyone is going to see it. A clear wall is fine, as is a bookshelf (although you may want to consider what books people will see).

Some apps allow you to set up a virtual background. This may need a 'green screen', and the effect may be less than ideal without that.

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##### SETTING UP THE TECHNOLOGY

If you are going to use the camera, and not just audio, make sure that you have it at or around eye level. This looks much more natural. Check your audio and video in advance (many apps will do this for you when you connect) and mute your microphone unless you are speaking to avoid disrupting other speakers.

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## REMOVING DISTRACTIONS

Remember that you are going to be visible to the meeting host and other attendees. Remove your phone, or at least switch it to silent, so that you are not distracted by notifications.

## PRIOR PREPARATION AND PLANNING

As with any meeting, it is important to prepare in advance. In a remote meeting, it is probably even more important to prepare, because you may only get one chance to speak.

Look at the agenda and think about the points you want to make. Condense them as much as possible to avoid wasting anyone's time.

If you have several important points to make, it is worth emailing the host ahead of time. Tell them what you want to say and why, so that they will know to call on you in the meeting.

## PRESENTING AT REMOTE MEETINGS

There is an art to presenting remotely. It is very much NOT the same as presenting in person, and it is worth thinking about it ahead of time. These ideas will help.

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### FIRST, SHORTEN YOUR PRESENTATION. SECOND, SHORTEN IT AGAIN.

It is hard to keep people's attention during a remote presentation. The best option is to shorten your presentation as much as possible, and particularly, cut down the number of slides. You should aim to have just a few that make points—and then just keep it brief.

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### BUILD IN AT LEAST 5 MINUTES OF CONTINGENCY TIME FOR PEOPLE LOSING CONNECTIVITY

It is annoying, but it happens during remote meetings. People lose connectivity, and miss a bit, and you must go over it again. Build that time in, and make sure that there is still time for questions.

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### MAKE YOUR PRESENTATION INTERACTIVE

It is much easier for people to concentrate if you can make your presentation interactive. You can use tools to add short questionnaires to your session or pause and ask a question. It is also helpful to provide regular opportunities to ask questions, rather than waiting until the end.

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### TOP TIP! GIVE PEOPLE PLENTY OF TIME TO REPLY

People often take longer to start to talk in remote meetings, because they want to be sure that they are not interrupting someone else.

It may therefore be helpful to allow longer pauses than you would normally expect before you start to speak. It is also worth checking explicitly at the end that nobody else has any questions.

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#### LIKE ANY OTHER ATTENDEE, GET YOUR TECHNOLOGY SET UP IN ADVANCE

Choose your location, make sure it is quiet, and get your background set up. Have any slides open and ready to share and know how to do that ahead of time.

If you are going to be making a lot of remote presentations, it may be worth investing in a separate desk microphone, rather than relying on the one on your laptop or PC. The quality of the sound will be better. Using headphones can help as an interim solution.

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#### BEFORE YOU START, SHUT DOWN ANY OTHER WINDOWS ON YOUR COMPUTER

You may need to move between apps during your presentation. Make sure you do not inadvertently show what you were browsing, or your latest (confidential) report by shutting down any windows that you will not be using, *before* starting your presentation.

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#### DURING THE PRESENTATION, REMEMBER THAT YOU ARE ON CAMERA

Unlike a meeting, where you are likely to be at least a meter away from any other attendee, more in a big presentation, you are quite close to your camera. The camera will be focused on your face and head, and you need to look at it, NOT at your monitor, or your notes.

Your hands will be less visible than usual, but your facial expressions more so. You therefore need to think about your body language and other non-verbal communication, and make sure that it is as effective as possible.

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#### SHARE YOUR PRESENTATION AFTERWARDS

This is always important—but perhaps even more so with a remote meeting where people may have lost connectivity and not wished to say.

#### A FINAL WORD

Attending remote meetings, including presenting at them, is NOT the same as being there in person. You must concentrate harder, and that is tiring. They are hard work. As an attendee, and especially as host or presenter, you have a part to play in making them easier for everyone. Using this advice will help you to do so.

## WHAT IS AN AGENDA?

In its simplest form, an agenda sets out the list of items to be discussed at a meeting.

It should include:

- The purpose of the meeting; and
- **The order in which items are to be discussed**, so that the meeting achieves its purpose. This will later shape the minutes of the meeting.

The agenda may include detail and will often contain timings for each item.

An agenda is a tool for attendees including, but not limited to, the chairperson and secretary. It serves several functions, before, during and after a meeting.

These functions include:

- **It helps potential attendees decide whether they need to attend.** By setting out what will be discussed, and for how long, it shows potential attendees whether they are crucial to the discussion and whether it is crucial to them. They can then make an informed decision about whether they attend or make their contribution in writing or via another attendee.
- **It helps invitees to prepare for the meeting.** Along with any papers, it allows them to understand what will be discussed and to think about the issues in advance. They can also prepare any facts or figures so that they have the necessary information to hand to make an effective contribution.
- **It provides a structure for the meeting.** It means that anyone diverting from the topic can be brought back to the matter in hand quickly and easily.
- **It allows the chair to control the meeting.** A timed agenda is especially helpful for this, since the chair can move onto the next item when the time is up, asking attendees to continue the discussion elsewhere if necessary.
- **It gives a way in which the meeting's success can be judged.** Because the agenda includes the purpose, attendees can see whether the meeting has achieved its aim or not. This makes it clear whether future meetings are necessary on the same subject.

## HOW TO SET AN AGENDA

There are, in general, five or six broad areas to be covered in an agenda:

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### LOGISTICS

This includes date, time and place of meeting, the title of the meeting and a list of invited attendees.

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## OBJECTIVE

The purpose of the meeting, and any background information such as whether this is the first in a series of meetings.

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## HOUSEKEEPING

This should include **welcome and introductions** and any **apologies for absence**. It should also cover **approval of previous minutes**, and any **matters arising** from them that are not dealt with elsewhere in the agenda.

In a formal meeting, housekeeping will also cover any amendments that are necessary to the last set of minutes, which should be formally documented in the minutes of this meeting.

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## ITEMS

This is the ‘meat’ of the agenda. Each item should have a number, a title, and a presenter/lead. It should also have a suggested time limit on the discussion.

Timing can be hard to ascertain without previous experience of the meeting. The secretary may need to ask the presenter/lead how long they think an item will take, and then discuss it with the chair. The final allocation should be based on the item’s importance to the objective of the meeting, and its level of controversy. A very controversial item that is incidental to the objective of the meeting should be postponed for discussion elsewhere.

In some formal settings, certain groups or individuals may have the power to ask for items to be included on the agenda. This will need to be accommodated, either by doing so or by careful negotiation of another opportunity for discussion if the agenda is already too full.

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## ANY OTHER BUSINESS (AOB)

Many agendas end with an item on ‘Any Other Business’ or ‘AOB’. While this can be an opportunity for attendees to flag up something for inclusion in a future agenda, it can also be very disruptive to the smooth flow of the meeting.

Attendees can use AOB to hijack a meeting for their own purposes and change the whole feeling of the meeting, often from a highly positive, action-focused discussion to a complaint. As AOB traditionally comes last, it is also the item that attendees are most likely to remember, especially if it was negative in tone.

A well-run meeting, with a well-prepared agenda, should mean that nobody wishes to raise any other business.

It is therefore strongly recommended that you either:

- Do not include AOB as an agenda item at all; or
- If you do include AOB on the agenda, you agree that it will only be as a way of raising issues for discussion at a future meeting, or elsewhere.

Bad feeling from excluding AOB can be avoided by offering attendees the opportunity to suggest items for inclusion on the agenda ahead of time.

It is the chairperson's final decision about which items should be included, taken in conjunction with the secretary, in his or her role as guardian of the process.

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## CLOSE

This should include the chair's summary of the meeting, the date and time of the next meeting, and any actions agreed and who is responsible.

Agendas should generally be short documents, ideally no more than one page.

A brief explanatory note of every item, including what is likely to be discussed and what is out of scope, will help attendees to prepare better and support the chair in controlling the meeting.

## BREAKS IN THE AGENDA

Some meetings, for example, formal board meetings, or away-days, may go on all day, or even over more than one day.

The agendas for such meetings will obviously need to include breaks, usually at least one break in the morning and one in the afternoon, as well as a lunch break.

Even a shorter meeting may benefit from one or more scheduled breaks. These offer the opportunity for discussion between two or more participants outside the main meeting and allow a meeting to get back on track if one or more item has taken more time than expected.

## MAKING MEETINGS MORE PRODUCTIVE

A good agenda ensures that the discussion flows but is focused, the meeting achieves its aim, and that it is a productive use of attendees' time.

Taking the time to prepare an agenda will be time well spent. It will also demonstrate to your attendees that you value their time as much you value your own. The effort will also pay off further down the line: when people get to know that your meetings run well and achieve their aims, they will be more likely to attend them in future.

## MINDFUL MEETINGS

Are you one of the people who hate meetings, because they go on too long, and never seem to be relevant?

Recent research from the Cranfield Centre for Business Performance at the University of Cranfield found that meetings do not have to be like this.

Instead, the researchers suggest, meetings can be one of the most powerful tools in any manager's toolbox if the chairperson can help participants to enter a state of 'mindfulness'.

In this state, the participants will see things more clearly and help to make better decisions.

## WHAT IS MINDFULNESS?

Fundamentally, mindfulness is being aware of the present.

Originally a Buddhist concept, mindfulness is one of the seven factors of enlightenment. In this context, it means an awareness of the reality of things and is therefore considered to be a way of overcoming delusion, and a key power.

On a personal level, mindfulness means being aware of one's body, mind, and feelings.

In a '*mindful meeting*', the chairperson helps the participants to be aware of the 'now' but not react too quickly to information.

This allows for exploration of new ideas and different perspectives.

The Cranfield research, led by Dr Andrey Pavlov and Dr Jutta Toblas, suggests that if the chair helps participants to become more mindful, they engage more effectively, focusing on the priorities of the meeting rather than their own thoughts. Although this may sound difficult, there is a surprisingly simple series of ten steps which the chair can take to help participants enter that 'mindful space'.

## MINDFUL MEETINGS: A TEN STEP PROCESS

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### ENCOURAGE OPENNESS

Those attending the meeting need to feel that they can speak openly, without having to worry about the potential consequences of what they say. Chairs can take action to encourage this by encouraging everyone to have their say and ensuring that personal criticism is not permitted.

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### ESTABLISH TRUST

Trust takes time to develop but, once it exists, it is a powerful tool in encouraging openness and sharing of information. It is important that the group in the meeting knows each other and has a

chance to build up trust. The chair may therefore wish to make clear that sending substitutes is not acceptable if one person is unable to attend, or that it is important that the group works together over time.

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#### MAKE SURE EVERYONE IS PHYSICALLY COMFORTABLE

It sounds strange, but research shows that all thoughts and emotions arise first as physical sensations. These are interpreted as feelings, and then influence decision-making. It is important to make sure that everyone is physically comfortable. This means that the chair needs to ensure, for example, that there is enough room in the meeting room for everyone to fit comfortably, that it's not too hot or too cold, and that everyone who wants one has a drink. With many organisations having banned even the idea of providing free coffee, this may mean emailing around to remind everyone to bring their own drinks.

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#### MAKE SURE THAT THERE ARE DIFFERENT VIEWS AMONG THE GROUP

If the group is too similar, several unhelpful issues may arise including the danger of 'groupthink' where the group does not see that other perspectives are possible. It is therefore good practice to ensure that those attending come from different backgrounds and functions within and beyond the organisation, and that they will therefore bring different perspectives. For example, in healthcare organisations, have you included a patient perspective?

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#### ALLOW PARTICIPANTS TO EXPRESS EMOTIONS

It can sometimes seem as if expressing emotions is frowned upon in a business context, and even in a personal meeting. They are just so messy. But how we feel is an integral part of how we make decisions, and so a mindful state cannot emerge if expressing emotions is not allowed. The chair may need to ensure that it is explicitly agreed that expressing emotions is permitted as the group may otherwise assume an implicit ban.

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#### MEET FACE TO FACE WHEREVER POSSIBLE

Although it is perfectly possible to foster an existing relationship by email, and even develop one, meeting face to face gives a powerful sense of connection. While you wouldn't want to drag people 200 miles just for a half-hour meeting, if possible, hold meetings when people are already in the same space to avoid teleconferencing, and encourage participants to speak in person whenever possible.

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## RESPECT THE FACT THAT PEOPLE HAVE A LIMITED ATTENTION SPAN

Focus and attention is crucial to maintaining mindfulness. It is also hard work and in limited supply. So, the chair needs to respect that and ensure that meetings are kept brief and to-the-point, with breaks and refreshments provided if necessary.

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## MAINTAIN FOCUS AS CHAIR

The chair is the focus of the meeting. Whoever is talking, it is likely that at least one other person in the room will be keenly aware of what the chair is doing. The chair therefore needs to stay present in mind as well as body and not be tempted to leave early and let the others carry on. The chair also has a role in keeping the meeting focused by bringing it back on course and clarifying the structure if necessary.

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## ALLOW NEW IDEAS AND PRIORITIES TO BE DISCUSSED

Mindfulness is all about the 'now', the present moment. If the meeting is focused on how the company or organisation has done things in the past, it is likely to miss new and emerging ideas. The chair therefore needs to stay involved as discussions develop and try not to resist new priorities if they emerge. The best way to do this is to focus on what is needed 'right now', which is likely to encourage the emergence of the required information and help the group to make the most effective decisions.

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## SHAPE THE STRUCTURE OF THE MEETING

Regardless of how easy it would be to let someone else shape the agenda, it is important that the chair is heavily involved. The chair also has a role in shaping the structure of the meeting as it unfolds and allowing it to develop flexibly if necessary. With the chair paying attention to the structure of the meeting, everyone else can focus on the content, and therefore make mindful decisions.

## JUST COMMON SENSE?

You may be thinking that many of these ten steps are common sense. And set out like this, they do look obvious. But it is also clear from research at both Cranfield and elsewhere that they are not necessarily the norm.

As chair, if you incorporate even a few of these ten points into your meetings, you are likely to find your meetings become more effective. If you incorporate them all, you will certainly find that groups that you chair make more effective decisions and that people are more willing to attend in body and mind.

## THE ROLE OF THE ADMINISTRATIVE PROFESSIONAL

During your career as an administrative professional you may be asked to take the minutes of a meeting.

In this capacity it is essential that you know what needs to be done and that you can take clear and accurate notes because the role of the minute-taker is primarily to create an official record of the meeting.

## THE MINUTE-TAKERS RESPONSIBILITY

In any formal group, the role is to be guardian of the process of meetings. They are usually the person who makes the arrangements for the meetings, including AGMs, and keeps formal records of the group's process and decisions: the minutes of the meeting. This may include keeping records of correspondence.

## PREPARATION: BEFORE THE MEETING

There are several things that the secretary needs to know before a meeting, most of which can easily be found out by asking the person due to chair the meeting.

The most important are:

- **Who is expected to make the arrangements for the meeting**, including finding a venue and arranging for suitable refreshments and any AV facilities? (This is often the administrative professional).
- **Who is responsible for preparing the agenda?** Each chair will have their own preference, but this is also usually the responsibility of the administrative professional, working with the chair. There may be other people who have a right to add items to the agenda.
- **The administrative professional has a role in making sure that the agenda is not overloaded**, which may include discussing with the chair and others what could be postponed to a later meeting, and what could be covered in a written report.
- **What type of notes or minutes are required?** Do they need to be formal minutes that set out who said what, or brief notes that record the agreed actions? How quickly do notes or minutes need to be produced and circulated after the meeting?
- **What is the process for clearing the notes for distribution?** Some chairs like to approve minutes before they are sent further, while others prefer them to be circulated to several key attendees at the same time.
- **If you are new to your role as the administrative professional**, it is also worth finding out who is expected to attend, the organisations that they represent, and some of the issues which have been raised at previous meetings. This will help you understand what is going on. You can do this by looking at past minutes of meetings and asking the chair what is likely to be discussed.

- **The administrative professional is responsible for sending out the papers for the meeting.** This will include, but is not limited to, the agenda, the minutes of the last meeting, and any papers for discussion or information.

## ON THE DAY OF THE MEETING

On the day of the meeting, there are several things that the administrative professional will need to:

- **Make sure that you know who is expected to attend the meeting.** If the building has security guards, you may need to provide a list of attendees.
- **Get to the venue early and check that everything is OK.** If you are responsible for the meeting arrangements, make sure that everything is there, the room is laid out correctly, any AV equipment is working, there are enough chairs, and any refreshments have arrived.
- **Give some thought to who sits where,** and even mark a seating plan, as this makes a huge difference to the way that the meeting runs. You should ensure that the chair is sitting centrally and that you are seated next to them.
- **Make sure you have plenty of spare copies of papers for those who have not brought a copy.** If there are a lot of papers it may be appropriate to arrange them in a folder using page/section numbers so that participants can easily find papers related to the current discussion.
- **If you are using name badges,** set them out in alphabetical order on a table by the door, where attendees can pick them up as they arrive.

## TAKING THE MINUTES OF A MEETING

### WELCOME AND INTRODUCTIONS

The minutes will include a full list of those present, and all who sent apologies.

To save you scribbling frantically as people introduce themselves around the table, circulate a sign-up sheet asking people to give their names, organisations and contact details. Note down any apologies for absence provided during introductions: people often introduce themselves as “So-and-so’s replacement and, by the way, he/she sends their apologies”.

### THE MAIN BUSINESS

How you take notes in the meeting depends on how formal the minutes need to be.

If you are only reporting a summary of the discussion, plus any action points, then you can afford to listen to the discussion and then summarise it in note form.

If you are expected to write down the main points made by individual speakers, then you will need to make a fuller set of notes, including the speakers’ names or initials.

It is a matter of choice whether you use a laptop or pen and paper to make notes, although it is as well to check with the chair in advance.

#### HANDY HINTS FOR MINUTE WRITING

- Develop your own shorthand for key words or phrases or jargon in your field so that you can just use initials for common phrases.
- Use initials to identify speakers in your notes. If you are not sure of the name, use the organisation: nobody will object to being identified as 'Representatives from x organisation', but unattributed views could get you into trouble.
- If several people make the same point, just add 'X & Y agreed'.

#### SUPPORTING THE PROCESS

It is the job of the chair to manage the process of the meeting, but there are several things that the administrative professional can do to help.

- Quietly pass a note to the chair highlighting any issues with the timing of the agenda, or slippage, or when coffee is due to arrive.
- Recap and summarise the discussion. This is particularly helpful when people are starting to make the same points again.
- Ask for clarification of a point if you do not understand it. The chances are that if you do not, others will not either and, anyway, you need to understand it to minute it correctly.
- Once an action has been agreed, check who is going to undertake it. It is not uncommon for a meeting to agree that action is necessary, and what that action is, without assigning who is responsible for it. You, as administrative professional, can ensure that this does not happen.
- Depending on the type of organisation, whether you are at a fairly junior level, or the role is voluntary and you're an elected member of a committee, it's probably best to discuss these responsibilities with the chair in advance to make sure that your intervention will be welcomed.

It is easy to get distracted by an interesting discussion and forget to write anything down. Always try to remain focused on your task, even when the discussion is going around in circles. The chair may call on you to recap at any moment.

#### AFTER THE MEETING

It is best to start writing minutes as soon as possible after the meeting. However transparent your notes seemed in the meeting, they will not be nearly as clear 24 hours later, and if you leave them for two weeks you will wonder whether that was you in the meeting.

- **Minutes should follow the order of the agenda.** Even if someone revisited a topic later in the meeting, you should include that discussion under the original agenda item. Make sure that you

include all the key points made in discussion, any decisions made, and actions agreed, together with who is responsible for actions.

- **Minutes are almost always written in the past tense**, and usually in the passive voice (“X set out that y needed to happen; it was agreed that Z would be responsible”). Use ‘would’ rather than ‘will’ for what is going to happen, especially with formal minutes.
- It is a matter of style whether you use first names, titles plus surnames, or initials to refer to those speaking. Check with the chair or look at past minutes to see what has been done before. Use the same approach consistently.

#### CHECKING AND APPROVING

If you are new to minute writing, it may be advisable to send the minutes to one or two trusted people to check and comment on before you circulate them more widely.

One of these people should be the chair unless they themselves have asked you to send them to someone else first. Once the minutes have been approved, they can be circulated more widely to the attendees and, if necessary, published on a website. Be aware that attendees may wish to correct any errors, and corrections will need to be incorporated in the next set of minutes.