

TECHNICAL BULLETIN NO. 58

SIX CONFERENCE PLANNING PRINCIPLES



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F O R E W O R D

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Each one of the six topics on Conference Planning Principles is so arranged in the pamphlet that a training or discussion session could be devoted to each one of the topics.

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CONFERENCE PLANNING

A conference should be held only when there is a definite need for a group of people to get together to reach a decision, to plan a new action to be taken, or to improve their knowledge and skill of specific projects. A conference planned for a specific purpose can result in gaining first-hand information about other people's problems, and in enlarging the general knowledge and understanding of the relations of their work not only to other divisions in their organization, but also to other organizations.

If a conference is planned, it should serve any or all of the following purposes;

1. To improve the handling of similar problems faced by a group of people.
2. To discuss different ways of tackling and solving problems.
3. To provide needed information and new ideas, points of view, and methods.
4. To provide an exchange of knowledge and attitudes gained from actual experience.
5. To decide on a joint program of action.

It is very important to clarify the purpose of a conference so that those who attend will know why the conference is being held. Find out what problems are upper-most in the minds of the conferees. A leader of

a conference can obtain material that will be helpful in planning the conference, and he can then announce to the conferees that the conference is actually planned in accordance with their desires. Interest and participation will be greatly improved.

One way to get conferees involved in planning the purpose and method of operation of a conference is to send a questionnaire to potential participants, asking them to make suggestions concerning problems which they would like to discuss, as well as conference activities and procedures. Further interest will be aroused if a description of what will happen at the conference, based on their interests, problems, and suggestions, is sent to the potential conferees.

SIX CONFERENCE PLANNING PRINCIPLES

The six most important principles in conference planning are;

1. Define and Clarify the Objectives

Determine why the meeting was called.

Are the planners agreed on what they are going to discuss?

Are the objectives chosen realistic so that they may be achieved at such a meeting? Are they attainable within the time limit set for the meeting?

2. Find Out Facts About the Audience and Participants

What are the objectives of the members of the audience - are they the same as those of the planners?

What attitudes are they bringing to the meeting?

What do they expect from the meeting?

How can leaders help relate the meeting to their back-home job?

What does the audience really want discussed?

It is important to find out during the meeting how the members of the audience feel about what is going on at the meeting. This is valuable for changing parts of the meeting, testing the platform communication, testing the interest and involvement of the audience, helping to further involve the audience, testing if the objectives are being reached, and planning for follow-up.

Finding facts about the audience after the meeting adjourns is important if the following are assessed;

1. The results of the meeting.
2. Which parts were effective and which parts were not effective.
3. What follow-up action must be taken to reach the objectives of the meeting.

3. Meeting Procedures and Presentation Methods

Presentations must be related to the needs of the audience. The right method of presentation for a particular subject must be chosen.

(Use charts, slides, and other visual materials for complex subjects, etc.)

Relate the presentation to the overall plan of the meeting.

(How awake is the audience - how much of heavy material, unassisted speeches, participative material, etc., has already been distributed.)

4. Involve Your Audience and Conferees

Get your audience "with you" by means of participation in the pre-meeting phase. Get an expression of how members of the audience feel about issues and what they want at the meeting through interviews or questionnaires. During the meeting, plan presentations so that members have an opportunity to participate. All of this helps the members of the audience to feel that the meeting is their concern. It brings them to the meeting less passive and less resistant.

5. Evaluate the Meeting

Program planning becomes real planning only when you have a measuring stick to guide you. This measure can be a check during and after a current meeting or can be a comparison between a current meeting and other meetings from which you have collected data.

6. Plan for Follow-Up

The meeting should not end when the members leave the room and go back to their jobs. Continuity of planning to apply the meeting objectives to the back-home jobs will give greater effectiveness in reaching those objectives.

CHECK LIST FOR PLANNING THE MEETING PROGRAM

1. What is the specific objective of the planners?
Is it realistic?
2. Who is the audience?
What do leaders need to know about them before the meeting?
3. How long is the meeting to last?
4. What subject material do the leaders want to present?
Is it related to the objective?
5. What is the logical order of presentation of the subject matter?
6. Should the material be presented in logical order? If not, why?
7. What are the plans for working up the group?

Coffee hour	Reading plans
During the first session	Registration
Pre-conference meetings	
8. What presentation methods will be used for each subject?

Demonstration	Speaker
Panel	Stunt
Role Playing	Symposium
Skit	Visuals
Other	

9. Does the schedule -
 - Allow breaks for questions at least once every 2 hours?
 - Have variety?
 - Have less than four presentations without a break?
 - Avoid having "heavy subjects" after heavy meals?
 - Present technical material in the morning or early afternoon?
 - Have field trips?
 - Allow for recovery from "recreation activities"?

10. Who is responsible for -
 - Arranging and planning committee meetings? When? Where?
 - Preparing the agenda or docket?
 - Recruiting the speakers and resource people?
 - Running rehearsals? (actors and performers, speakers, technical)
 - Preparing cue sheets?

11. What measurement devices, if any, will be used?
 - Post-meeting reaction forms,
 - Sample interviews,
 - End of meeting questionnaire,
 - End of meeting interview, etc.

12. Will the question periods -
 - Bring out the representative questions?
 - Meet the needs of the members of the audience?

13. What are the specific plans for helping the audience to use the material from the meeting on their back-home jobs?

14. What plans do the leaders have for follow-up after the meeting?

AUDIENCE NEEDS AND EXPECTATIONS

A tip for leaders as meeting planners - the pre-meeting questionnaire involves the audience actively in the meeting BEFORE THE MEETING STARTS by calling on the members of the audience to help plan and make them feel that the meeting will be concerned with their problems.

A pre-meeting questionnaire should be sent out, completed, and returned by potential participants of a meeting before even a clinic meeting is started. Although some of the personnel to whom the questionnaire is sent may think that it is useless and a waste of time for people to take the time to work on a questionnaire, it is a leader's way, however, of finding out (as a meeting planner) what problems are to be considered on a priority basis. It is important for a leader to find out what people want rather than have the leader determine the program for them.

PRE-MEETING QUESTIONNAIRE

COMMENTS

A short statement showing that the participants are provided an opportunity to help plan the meeting about matters that they want to discuss.

Promising proof that what the participants write will really effect the meeting plans.

Putting problems in general terms rather than on a personal basis allows for ease of response and fewer blocks to genuine feelings.

Compare responses with those topics marked in question 1. Does this indicate that the suggested topics have little relationship to the job problem, or does it show that the participant is not clear about what he wants?

This may give clues as to what the participant expects.

You may get a great idea, but even if you don't the earnest participant has a chance to fully expand his ideas and the cynic can air his gripes.

Anonymity smooths the way to free expression.

THE QUESTIONNAIRE

This questionnaire is being sent to you to make certain that the forthcoming meeting will deal with your on-the-job problems. Your cooperation in answering certain questions will be helpful as a guide in planning the meeting.

Before the meeting a copy of the meeting plans based on the return from the questionnaire will be sent to you.

1. Please list in order of importance five job problems that you think should be discussed at the meeting.

- 1.
- 2.
- 3.
- 4.
- 5.

2. Of the topics that are listed which would you like to see handled. (Write a figure 1 after the topic you want discussed most. Write figure 2 after the topic you want to have discussed next, and write figures 3 to 5 after the next three topics you want to have discussed.)

3. We all go to meetings and most of us run meetings. In terms of making all of our meetings more effective, what parts of this kind of meeting do you think needs improvement most?

4. Please give specific suggestions for this meeting, even if we will not be able to use all of them.

It is not necessary to sign this questionnaire.

PLANNING THE PROGRAM

Determining Methods of Presentation

The audience is usually sympathetic at the very beginning of presentations and becomes hostile, bored, angered, or excited only through what happens during the presentations.

Some of the kinds of questions on which meeting planners check when they begin looking into presentation methods are:

- What outcomes are hoped for from the presentation.
- What do they want to say.
- What kind of material is it
 - technical
 - controversial
 - "sell"
- Is there a training objective?
- Is the emphasis on things, human relationships, or situations?

And about the entire meeting it might be asked;

- Where does this presentation fit in the meeting plan?
- How awake is the audience?
- What kind of hall or room, and other facilities are available?

Kinds of Platform Presentations

There are five general categories of platform presentations:

1. The Unassisted Speech — this is useful for giving information, bringing the experience of an "expert" to the audience, and for inspiring an audience.

It is less effective for complex technical information, for giving several points of view on a controversial issue, and to present material on human relationships, such as leadership or salesmanship.

2. The Exhibit or Visual Type Presentation — effective for presenting complex technical material, organization structure, functions of personnel, manufacturing processes, budgets, etc. The leader is aided by charts, graphs, slides, slide-films, vuegraphs, films, etc. Leader's role is that of commentator.

3. Situation Presentations — Uses some form of demonstration for illustrating "how to." Also, useful in clarifying a problem to an audience. Some of the methods are: role playing, interviewing platform participants by members of the audience, illustrative vignettes, etc.

Ineffective use of a form of demonstration is in showing an either/or problem or a contrast situation.

4. Dramatic Action — When a conflict situation is shown. "How to be a better salesman", showing good and bad sales techniques. This technique is also useful when the leader wants the audience to look deeper into a problem.

It should not be used when material is descriptive or when the appeal is primarily to the intellect. The basic appeal of this form is to emotions.

5. Panel-form symposium — Used to present different points of view on a subject or to give information on different aspects of a problem.

If a leader wishes primarily to give information, use the symposium-form with short talks and a moderator summarizing. If he wants to give several points of view on an issue so that the audience can make judgments, the panel is preferable.

The forum is useful if participation by the audience contributes to the effectiveness of the presentation.

IMPROVING THE EFFECTIVENESS OF SPEAKERS

How to help improve presentations of speakers when there is time only for short rehearsal

Things for the meeting manager to do —

1. Analyze the total situation in which the speech is to be made.
2. Identify the factors of insecurity which might be a problem for a particular leader or speaker.
3. Make a specific plan for helping the leader or speaker in terms of these problems.
4. Rehearse the leader or speaker.

Some Guides For Improving the Effectiveness of Speakers

1. If speaker fears that he won't be heard, Rehearse with the microphone.
2. If speaker fears that he will forget words, Help him get the sense of the speech and thus free him from dependence on manuscript.
3. If speaker feels that he must read the speech, Have him use an outline on cards.
4. If speaker feels that the words are not in his usual vocabulary, Have him tell you what the speech says in his own words and make changes in the manuscript.
5. If speaker worries about gestures and what to do with his hands, Help him realize that the gesture is a natural movement for a speaker and one to be used for emphasis.
6. If speaker worries about platform voice, Rehearse him, to keep natural speaking manner, varying pace as in conversation.
7. If speaker feels that the situation is different from usual way of addressing group, Put him in situation where he feels comfortable and where people usually see him, such as at his desk.
8. If speaker is worried about using visuals or props, Rehearse him, working with visuals and props marking script as he goes along.
9. If speaker is worried about using lights or cues, Have technical rehearsal running through lights and cues.
10. If speaker is worried about where to stand on large stage, Have speaker stand right of center as he faces audience in a large auditorium. If material important thing, speaker stands left of center.

QUESTION AND ANSWER PERIOD

The silence after the leader or chairman asks: "Are There Any Questions?" or the smattering of token questions in the Question and Answer Period of a meeting, is a tell-tale indication of how effective your communication is during the meeting.

If question periods are so embarrassing at times, why are they held? There are several good reasons:

- To make certain that the audience gets what it was intended to get.
- To emphasize certain points.
- To help relate information to back-home jobs.
- To give a further opportunity for participation in the meeting.
- To insure retention of what is learned.

However, with all these good intentions we frequently fail in Question and Answer periods: Here are some of the obstacles:

1. Bad scheduling -- time is too short, or the Q & A period is too late in the session.
2. Audience Not Set For Question Period -- they've forgotten their questions, have not had direction to their listening, don't know where to start, are reluctant to ask personal questions, etc.
3. Questions Not Pertinent to Meeting Or Representative of Audience Feeling -- questions may relate to trivia and have little common interest.

4. Emotional Barrier Between Platform and Audience -- men don't feel free to discuss matters with bosses, questions express gripes, they sometimes tend to be tricky, thus putting planners on guard.

5. Questions Are Not Employed To Improve Meetings -- leaders do not relate questions to ongoing program, they don't use questions as basis for later discussion, nor do they employ questions to test the meeting.

How to Improve Question and Answer Periods

1. Prepare the audience by means of:

Listener's Guide -- List areas where planners think questions should be asked.

Audience Listening Teams -- Divide audience into listening teams, each with their eye on a specific area.

Buzz Groups -- Small face to face groups of 6-8 people to go deeper into problems discussed and to come up with questions.

2. Catching the Questions Before They Are Forgotten -- Providing members of the audience with opportunity to ask question when they feel the urge without disrupting meeting plans.

A. Methods of Crystallizing Questions

- Providing notepads or question cards.

- Deep freeze method - having members put questions in a particular place during breaks in a presentation to remain until the end of a period.

- Random sampling for questions - interview sample of audience as questions occur to them during a planned break.

3. Select Questions For Representativeness and Importance

A. Methods of selection are:

- Help Your Neighbor -- each member turns to neighbor and they screen for one another.
- Buzz sessions -- each small group selects 2 or 3 of the most important questions.
- Role Play by Audience -- representatives selected by chairman goes to stage and has public discussion on which questions are important.

4. Help Audience Relate To Back-Home Job

5. Employ Questions for Improving Meetings

Tests - how well material was received, gaps that need filling, kinds of presentation most effective, whether members received the help they wanted, testing the effectiveness of the whole meeting.

EVALUATING THE MEETING

It has been shown how facts about the audience are collected before the meeting starts. During the meeting and after the meeting, attempts should be made to collect further facts. While the meeting is in progress try to determine if changes in the program are necessary, and, also, try to involve the members of the audience further by gathering their feelings about the present process.

Three types of fact-finding methods are used during meetings:

1. Interviewing a sample of the audience

This is usually used effectively to test whether objectives are being understood, and how the audience feels generally. It is better if questions are posed in terms of how the interviewee thinks others feel about the meeting, what they think others like or dislike, and what they want changed.

2. Post Meeting Reaction Forms

Simple questionnaire form given to all members at the end of each meeting or session. It serves to get the general feeling people had about the meeting, to permit them to list specific points they liked or disliked, and to help in planning the next meeting by telling what they would like changed.

The Post Meeting Reaction, in effect, serves to collect and systematize the after meeting conversations and gripe sessions. When the results of these forms are reported back to the audience, it helps to involve audience members further and to improve the meeting.

Starting the next session with a 5-minute report on how people feel in general, what they liked or disliked, what they wanted changed -- followed by statements showing the changes made or why they could not be made -- helps the members of the audience feel their ideas are important and lifts audience morale.

3. End of Meeting Interview or Questionnaire

This tests the member's degree of satisfaction in terms of pre-meeting expectations. It also collects information on the still unsolved job problems.

PLANNING FOLLOW-UP

Some meetings appear as if a bang up job had been done at the time, but they do not stimulate the hoped for results after the meeting is over. Other meetings might not appear successful when they are held, but they bring excellent results months later.

The planner should know the results of the meeting in terms of what was not understood so that future meetings can be improved. He must also find out what follow-up action is required to reach the objectives of the meeting.

The after-meeting questionnaire gives the planner the following information:

1. How satisfying was the meeting now that some time has elapsed.
2. What were the worthwhile points.
3. How have the results of the meeting been used.
4. What further help is needed.
5. What should future meetings be like.

This questionnaire should not be sent out immediately after the meeting. Rather, it should be distributed weeks or months later when results of the meeting have had a chance to appear.