



Follow-Up Meetings for Clients

*Follow-up Meetings for Clients: a training manual for Instructional Design
Consultants*

A training manual for Instructional Design Consultants | HPT 8200
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Preface

This training manual was designed to address the need for instructional designers working in a consultative manner to know how to have follow-up meetings with clients. It will give these consultants general knowledge about the types of meetings they may need to have to achieve their goals with clients, as well as the front-end planning for those meetings.. The guidelines in this training manual serve as a self-study tool and are not to be used as a source for instructor lead training.

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Follow-Up Meetings for Clients



Introduction

In this lesson, you will learn about follow up meetings with clients. Since you will be working as a consultant, you will need to know the types of follow-up meetings and how to plan them to help move your project forward.

Oftentimes, busy professionals are subjected to long, arduous meetings where very little progress is made. And having an outside consultant running a meeting can be even more difficult. Since consultants often work on limited contracted time schedules, we know that meetings need to be efficient and effective. It is beneficial for consultants to know the different types of follow-up meetings, so that they can use their time wisely, maximize the relationship with the client, and continuously move the project forward to completion.

Follow up meetings are important because they allow the consultant and the client opportunities to connect throughout a project. During meetings consultants can get more information, give status reports, gain clarity on things that may be unclear, or perhaps revise strategy. Whether you are serving as a consultant who already works for the company, or you are serving as an outside consultant, meetings are a crucial part of the overall project.

In our previous lesson, we learned how to create an online portfolio. This is an important front-end tool that helps the consultant showcase his or her resume and abilities, which could lead to business opportunities with new and repeat clients. Once the consultant contracts for new business, he or she needs to know what types of meetings would be most effective during the project.

Objectives

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

- Identify 4 types of follow-up meetings
- Indicate the time lapse from the last client conversation to the next time you schedule a meeting to update the client
- Name 4 different web tools to help you schedule a meeting.
- Select three resources that help instructional designers proceed through the meeting goals
- Schedule a meeting using an online scheduling tool

Outline

What is a meeting?

Define 4 types of follow-up meetings

Determine when to schedule meetings

Explore web tools that help you schedule meetings

List resources that help an instructional designer proceed through meeting goals

Practice scheduling a meeting using an online scheduling tool

Summary



Section One: Lesson Introduction

What is a meeting?

A meeting is an assembly or conference of people for a specific purpose, such as a business meeting.

Instructional designers spend a great deal of time interacting with others. Whether performing front-end analyses, analysing data, or developing training solutions, as a consultant you will most likely have the need to meet with the client or others employees during the course of the project.

Types of meetings

There are 4 types of meetings in which consultants with interact with clients.

- ***Informational meeting.*** An informational meeting is a meeting that is used to disseminate information. Some examples of informational meetings are annual village hall meetings, parent-teacher meetings centered on a student's progress in the class, and a public relations briefing. In these meetings, typically one party is sharing information, while those attending are there to attain the information.
- ***Discussion/collaboration meeting.*** A session where brainstorming takes place is an example of a discussion or collaboration meeting. The reason for these meetings is generally to solve a problem. One or more of the parties involved might work on the agenda and the intent is for multiple people to contribute information.
- ***Check-in meeting.*** A regularly scheduled meeting is the check-in meeting. This is expected for a project that can be on-going or has an anticipated date of completion. Check-ins can be less formal and are good for updating all parties on problems, solutions, changes, and progress. Regular check-in meetings can be short and to the point.
 -
- ***Working meeting.*** In a working meeting, you simply do the work that needs to be completed. They are collaborative and are good for eliminating procrastination. One example of what can be accomplished in a working meeting would be a management team coming together to create annual company goals. Having the necessary parties together provides on the spot agreement on initiatives and procedures needed to achieve the goals.

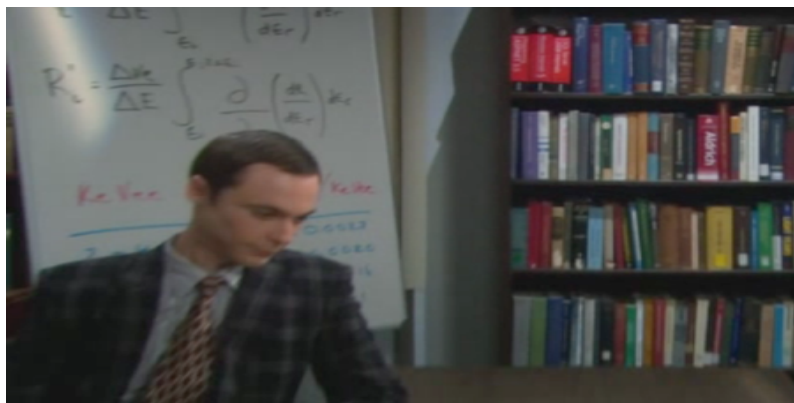
Activity 1.1 Quiz

Answer the questions by writing which of the 4 meeting types describes each scenario.



- 1) Jean wants to meet with SMEs and possibly floor sales reps to find out why the cashiers do not ask all the marketing questions required to obtain answers about each customer. She will eventually meet with the cashiers, but first wants to gather information from others who may be directly or indirectly involved with the cashiers. What type of meeting should she have?

- 2) Derrick has a signed contract to begin consulting with the *Interstate Company*. He's been introduced to the staff informally, but wants to get everyone together to lay out his plan so they will know why he is there and what to expect. His goal would best be accomplished through what type of meeting?





3) It's been difficult for Miranda to catch up with two managers to determine what the performance gaps are. She decides to have a meeting where she can get them together at the same time to get the information she needs. They meet so she can create their list of problems and possible solutions. What type of meeting is this?

4) Kyle calls James and Brenda to see if they have a few minutes for an update. Kyle needs to consult with them to resolve a few issues that are holding up the project. The 15-minute meeting brings clarity to Kyle's concerns and the project is back on track. This is typical of what type of meeting?



(See the appendix for answers.)

Section Two: When to Have Meetings



You've learned about the different types of meetings and now know which one to have, depending on the situation. Aside from knowing the types of meetings, you also need to know when to have meetings.

Some meetings occur daily, weekly, or monthly. Do you meet by these standards or whenever the client or consultant wants to meet?

Managers polled through *PC Magazine's* website, pcmag.com, agreed that meetings should be scheduled as soon as possible.

After the initial contractual meetings a consultant has with the client, careful consideration is needed on when to meet thereafter.

Some meetings are scheduled more than two or three weeks out, for on-going or long-term projects. But most other meetings should be scheduled based around crucial conversations that happen among all the parties involved. These conversations happen by these three methods:



These conversations tend to stay fresh in your mind if you act on them quickly. The best time to schedule a meeting is within two days of a crucial conversation.



What about the actual time of day in which to meet?

Most people tend to schedule on the hour, such as 4:00. Meetings are also scheduled during mid-hour, like 11:30. Either way is fine, but consider scheduling a meeting at an odd time, such as 10:10 am.

Scheduling a meeting at an odd time gets everyone's attention and drums up curiosity. Plus it will give attendees a chance to do things prior to the meeting like chat, get snacks, use the bathroom, or take care of any other thing that usually makes them late. People habitually come on the hour, so starting after the hour makes it easier to start on time.



#1: Start your meeting on time so attendees don't think lateness is acceptable.

#2: Close the door to the meeting room. This reinforces that the meeting has begun and will continue whether someone is late or not.

#3: Print and distribute meeting agendas. Speak about important items first.

Activity 2.1- Meeting time

Now that you have reviewed when to have meetings, list three best days and times to have meetings and three worst days and times.

Best:

1. _____

2. _____

3. _____

Worst:

1. _____

2. _____

3. _____

(See the Appendix for possible answers)

Section Three: Scheduling Tools



There are many different types of online scheduling programs that you can use to schedule meetings. This is particularly helpful to consultants who may not have access to internal email programs from which they can schedule, like Microsoft's Outlook program.

Here are 4 web tools you can use to help you schedule meetings:



All of these online scheduling tools are available for limited time free trials. Subscription rates apply after the trial period concludes.

Here is a comparison chart of some of the features of each online scheduling tool:

ScheduleOnce	Appointment-Plus	Lattiss	Time-Bridge
\$5.00/month	\$34.00/month	\$29.95/month	Contact for pricing
Multiple meeting types, services, and locations can be scheduled	Set one or multiple appointments per time slot	Automatic notifications and reminders to minimize no-shows	Propose up to 5 times that work best for you (on any calendar system)
Works in tandem with personal calendars	Color-coded grid to determine appointment status	Secure access to your schedule from any location	Sorts the proposed times and chooses the best time to meet
Automatic bookings or bookings with approval	Set recurring appointments	Easy set-up	Accessible through Android and mobile apps
Desktop and mobile apps; embed in webpages	Mail and text reminders	No software needed	Countdown to meeting start time with auto email and text messages

Later in this lesson, we will take a closer look at ScheduleOnce and learn how to use the program.

***Quick Tip:** If you are an inside consultant at a company through which you are already employed, it may be easier to use your company's network email and calendar system, such as Outlook.

Additionally, you may find that some of these online schedulers can work in sync with your office email system, thus enabling you to include people outside of the company, if necessary.

Section Four: Meeting Resources



We have just learned about online tools that can help a consultant to schedule meetings. Now, we'll take a look at other useful resources that consulting instructional designers can employ to help them proceed through the meeting goals.

Demonstrations

If you must use a PowerPoint presentation to communicate points to the meeting participants, then do so. But if you have a task or product that you want to share with the attendees, then demonstrate it. Demonstrations leave visual impressions on the minds of the attendees because instead of talking about something, you actually show what you're talking about.

**Quick tip: Send information, like pictures and videos, to attendees prior to meeting. Then attendees will have time to familiarize themselves with the material and thus reduce the length of the meeting.*



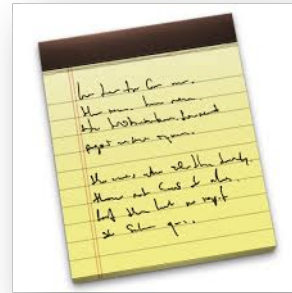
Technology

With technology, you can:

- Access files digitally
- Display documents and charts through projectors or monitors
- Play videos or audios as a supplement to the presentation
- Use conference calling to include people who are physically absent
- Make audio or video recordings
- Incorporate a speaker system with headsets instead of handheld microphones
- Use tablets to issue paperless binders of meeting documentations

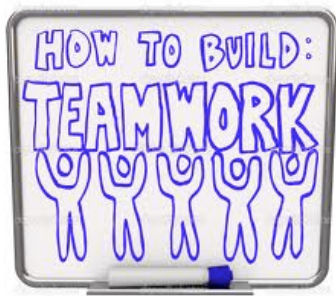
The major benefit of using technology? Portability. You don't have to print multiple sets of documents for all meeting attendees. Documents can be shared on your computer or mobile devices that others may not have seen prior to the meeting. You may access calendars and information at your fingertips (with internet access). Take notes electronically, which can be emailed out to attendees immediately after the meeting.

If a meeting attendee is not able to physically attend, he or she can call into the meeting, the call can be placed on the phone's speaker so everyone can hear the caller and he or she can still participate.



Visual Display of Notes

A visual display of notes is especially beneficial if you are having a collaborative/discussion meeting. Notes can be displayed on a number of tools such as:



Dry erase boards

Large flip note pads

Projectors connected to computers/smartphones

And yes, some people still use chalkboards!

Not all meeting rooms come equipped with the latest technology. And sometimes technology fails. Always come prepared with paper and markers (or pens) so you can still write what needs to be seen by others in the group.

Activity 4.1: Quiz

Circle the best answer(s) for each question.

- 1) What leaves a greater visual impression on the attendees' minds?
 - a. Notes on note pads
 - b. Demonstrations
 - c. Visual displays
 - d. Videos

- 2) Technology tools that can be used in a meeting include:
 - a. Videos and recorded notes
 - b. Videos and audio recordings
 - c. Projectors and computers
 - d. Computers and note displays

- 3) On which tools can you display notes?
 - a. Projectors and Smartphones
 - b. Note pads and videos
 - c. Smartphones and note pads
 - d. Dry erase boards and note pads



Section Five: Schedule a Meeting



Congratulations! So far, we have learned about different types of meetings, when to meet, various scheduling tools and meeting resources. Now we're ready to schedule a meeting using one of the online schedulers mentioned earlier in this training, ScheduleOnce.

**Prerequisite: If you do not already have an account, go to scheduleonce.com and follow the instructions to create a new account by using an existing email account or sign in with your existing Google or Facebook I.D. (if applicable).*

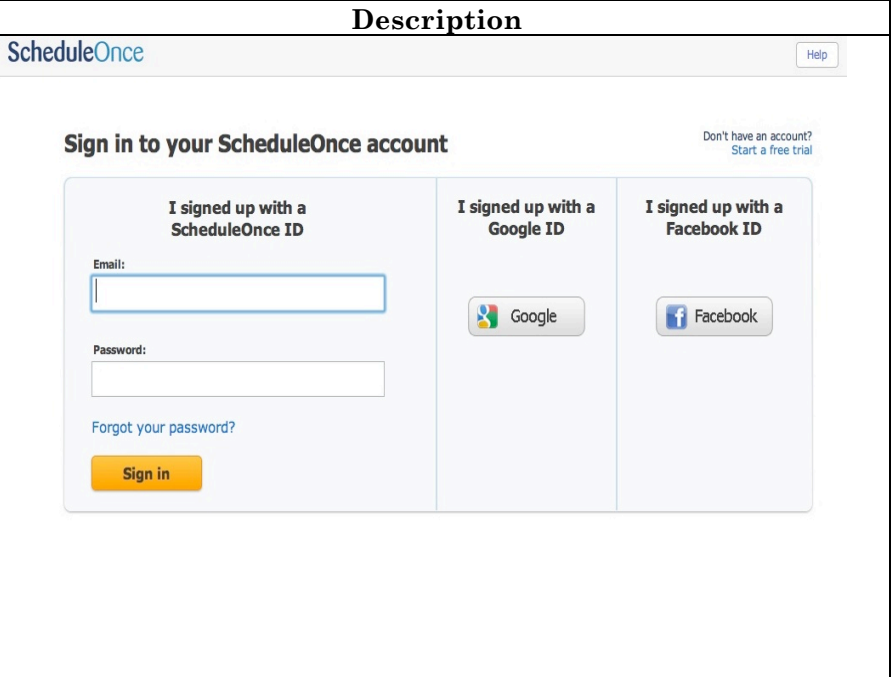
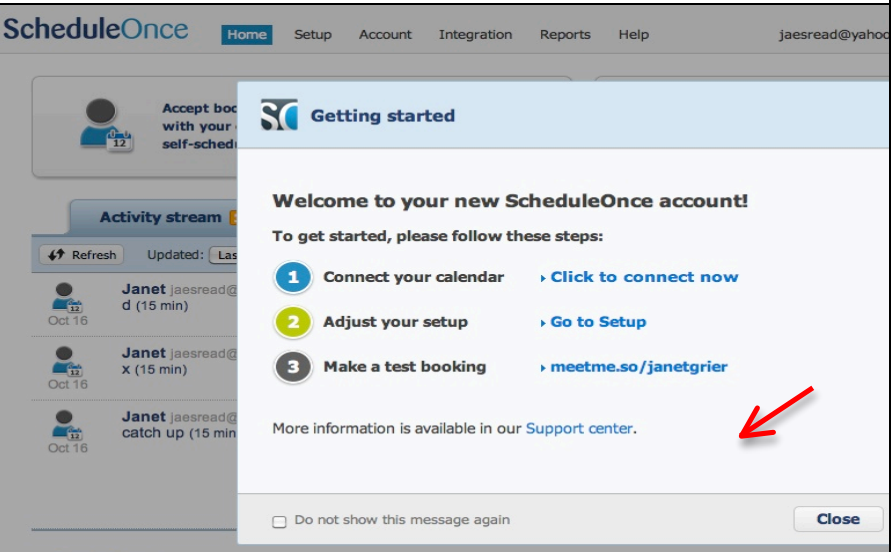
Activity 5.1

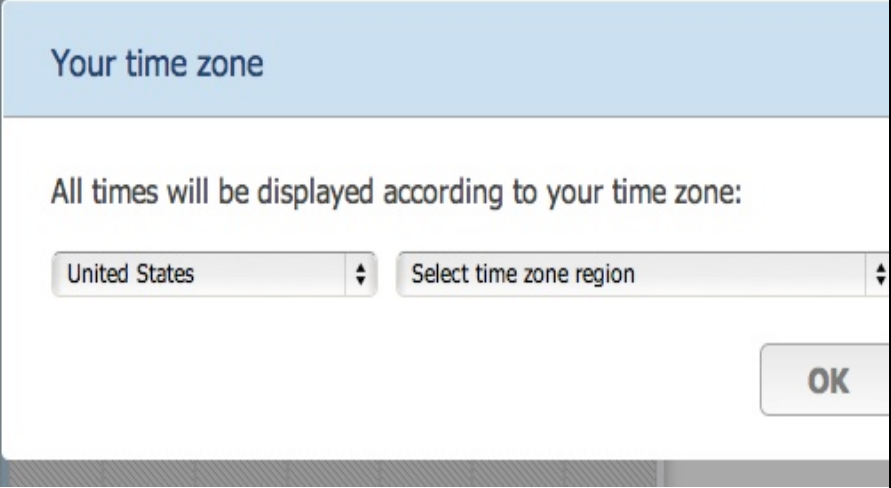
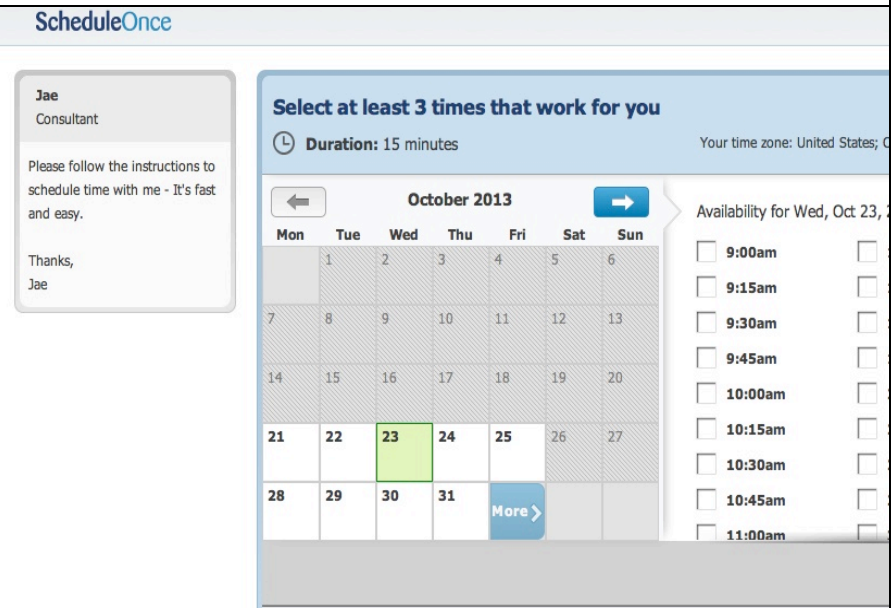
Job Aid

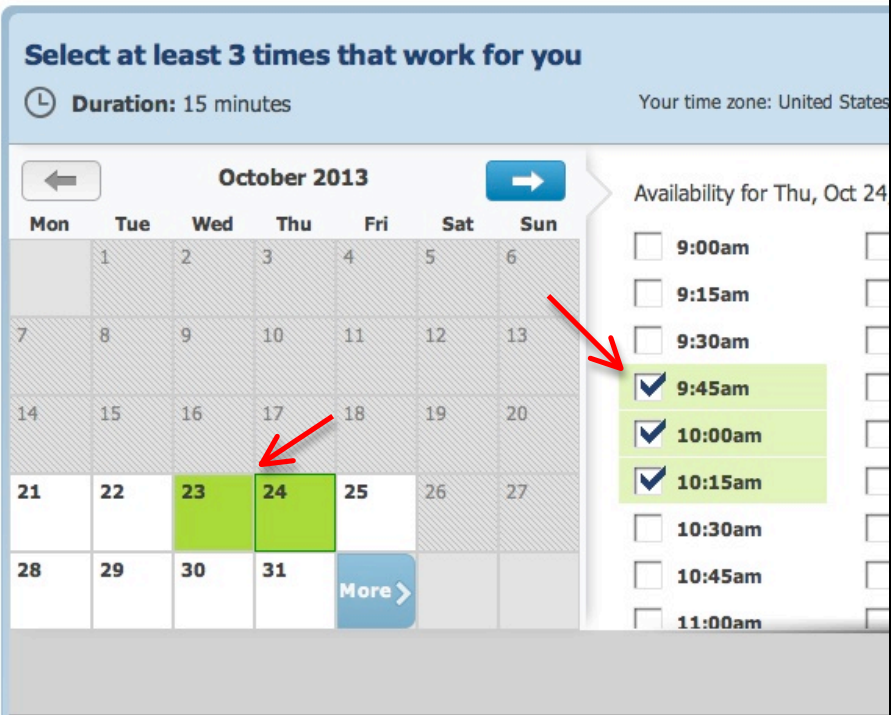
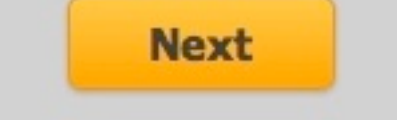
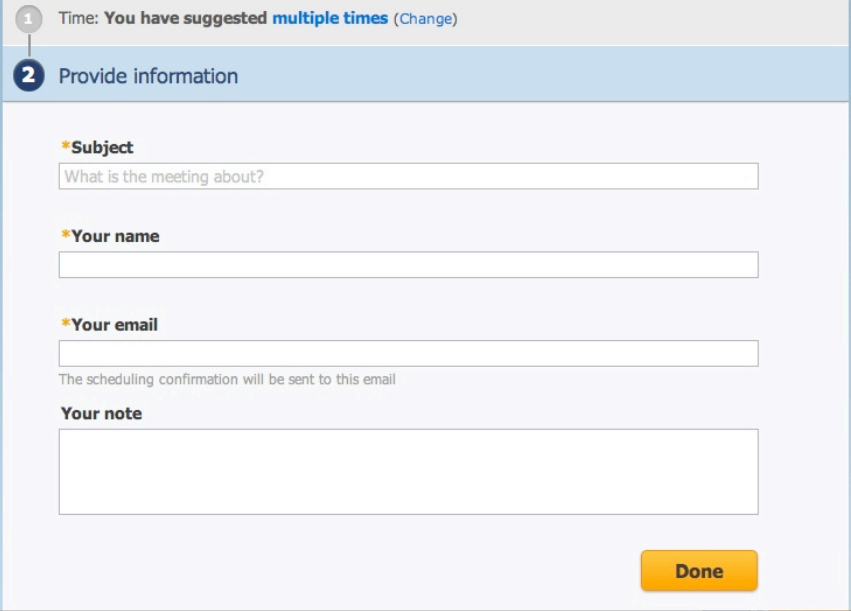
How to Use ScheduleOnce



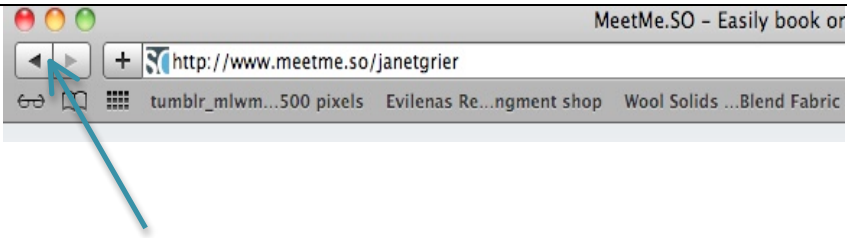
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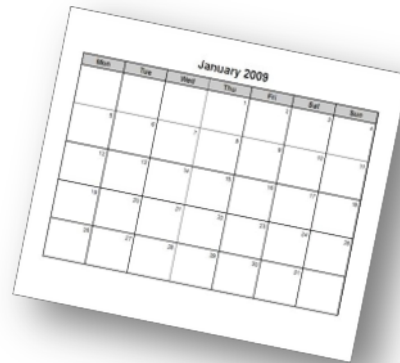
Create an account. You may use your Google ID if you have one, or create a new account for a short trial period.

Step	Instruction	Description
1	Log in to your ScheduleOnce account on the Log in page.	
2	Upon logging in, the “Getting Started” window will appear. You want to make a test booking. Click on the link next to item 3 that says “meetme.so/(name)”	

3	<p>Next, another window will pop up asking you to select your time zone. Click on the down arrow if you are in a country other than the United States, and select your country. Next, in the box to the right of the country, click the down arrow to find and select your time zone region. Afterward, click the “OK” button.</p>	
4	<p>You should now be on the page on which you select possible dates and times for meetings.</p>	

5	<p>Choose a calendar date and 3 time periods that work for you. First, click in the desired day on the calendar. Then click in 3 of the small boxes next to time periods in which you propose to meet.</p>	
6	<p>Click the NEXT button at the bottom right of the page.</p>	
7	<p>You are now at the page where you can input email addresses to send the meeting invitation. In the “SUBJECT” line, type in the meeting speaker’s name and the subject of discussion. Then type in your name and email address in the spaces shown. Finally, insert a note. You may use this section for an agenda or a note regarding the meeting.</p>	

8	To send the proposed meeting schedule, click the “DONE” button.	
9	You will now see the confirmation page, showing that your meeting request has been sent. You may opt to book another meeting by clicking next to the statement, “Need to make another booking?” at the bottom of the window.	 <p>Your request has been submitted successfully The request details will be sent to the email you provided</p> <p>Subject: janets shoes</p> <p>Time: You have suggested multiple times</p> <p>What's next? Your request will be reviewed and a time will be confirmed with you</p> <hr/> <p>Need to make another booking? Click here</p>
10	To log out of the scheduler, simply click your web browser's exit button. It will log you out of the system automatically.	



Quick Tip: use the Notes section as a place to put your meeting's agenda. This will ensure that you have one less email to send to those you invite and they will see ahead of time what the meeting will entail. For tips on creating an agenda, see the next page.

Appendix

Activity 1.1- Quiz answers

- 1) Discussion meeting
- 2) Informational meeting
- 3) Working meeting
- 4) Check-in meeting

Activity 2.1 Quiz answers

Best: Any odd time period (such as 10 minutes after the hour or half hour: 10:10, 9:40, etc.) that you list would be the best time to schedule a meeting. The best day to schedule a meeting is within 2 days of a crucial conversation.

Worst: Scheduling a meeting on the hour or half hour is the worst time to schedule because some people tend to be late, or people are not prepared to immediately start the meeting. Worse day to schedule the meeting would be anything beyond the two days after a crucial conversation, unless it is a long-term project that may need meetings scheduled out over a course of time.

Activity 4.1 Quiz answers

- 1) b
- 2) b, c
- 3) d, a

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