

Tips for Facilitating Successful Meetings

Here are some tips to help advisors feel involved and included in meetings.

All Meetings

1. Develop rapport among members: Spend time on introductions; this helps advisors to understand who is at the table. The more advisors get to know the people in their team, the more comfortable they will feel sharing their thoughts.
2. Promote storytelling: Provide opportunities for advisors to share their stories (if they are comfortable doing so). Allowing team members to learn about advisors' experiences makes team members more likely to value the views of advisors.
3. Open the door: Encourage advisors to ask questions or to ask for explanations.
4. Check for understanding: When needed, summarize comments to get clarity.
5. Foster equality among members: When advisors feel they are equal members of the team, they are more likely to be open about their thoughts and feelings.
6. Avoid jargon and acronyms: Do not use medical jargon or acronyms during meetings. If you use jargon or acronyms, explain the terms before using.

In-Person Meetings

1. Arrive early: Greet advisors at an easy-to-find meeting place and help them find the meeting room.
2. Provide a map or signage: This helps advisors find their way to the washrooms, break out rooms, etc.
3. Use nametags: These help advisors identify attendees.
4. Sit beside advisors: This helps them feel comfortable. It can also create a sense of safety, as advisors can ask you questions before sharing their thoughts.
5. Provide support to advisors during breaks: Help advisors find the washrooms, get them something to drink.
6. Ensure advisors have someone to eat or talk with during meals or coffee breaks: This can increase their feeling of belonging.



Patient Engagement
Reference Group



Virtual Meetings

- 1.** Attend the first few teleconferences or videoconferences with new advisors: This provides them with support.
- 2.** Teach and test meeting technology: Hold a pre-meeting with advisors to test and to show them how to use the meeting technology.
- 3.** Provide the telephone number and conference ID for video-conference and Skype meetings: This allows advisors to call in by phone if they have trouble joining the virtual meeting.
- 4.** Show advisors how to mute and unmute their phone line: This helps to prevent interruptions. To put a phone call on mute, press *6. To unmute press *6 again.
- 5.** Send meeting materials in advance: During the meeting, let attendees know what material is under discussion so they can follow along.