Meeting Management Software 101

The complete guide to meeting management software for the public sector.

eScribe

Introduction

In the public sector, strong collaboration between local officials and those they serve is critical to happy, healthy communities. Effective, productive meetings are a cornerstone of solid, ongoing partnerships.

Holding successful public meetings seems simple enough. But the public sector faces myriad challenges when managing the many moving parts involved in planning, executing, and following up on a meeting.

While technology continues to evolve rapidly, many elected officials, city clerks, and local government staff continue to employ inefficient, paper-based processes to manage the meeting life cycle. As a result, they get bogged down with these time-consuming tasks – leaving them with less time to grow strong partnerships and progress toward big goals.

Fortunately, public sector organizations are learning there's a better way.

Increasingly, organizations are trading manual meeting management for meeting management software. As a result, these organizations are better equipped to simplify and streamline meetings – while boosting transparency and engagement.

But what exactly is meeting management software? And why are a growing number of public sector organizations getting on board?

In this guide, we'll discuss:

⟶   What meeting management software is

⟶   How this software can improve your efficiency

⟶   Key features to look for when considering your options

⟶   How meeting management solutions work

⟶   How to get started

You'll walk away with a clear understanding of the role of meeting management software – and how the right solution can be a game-changer for your public sector organization.
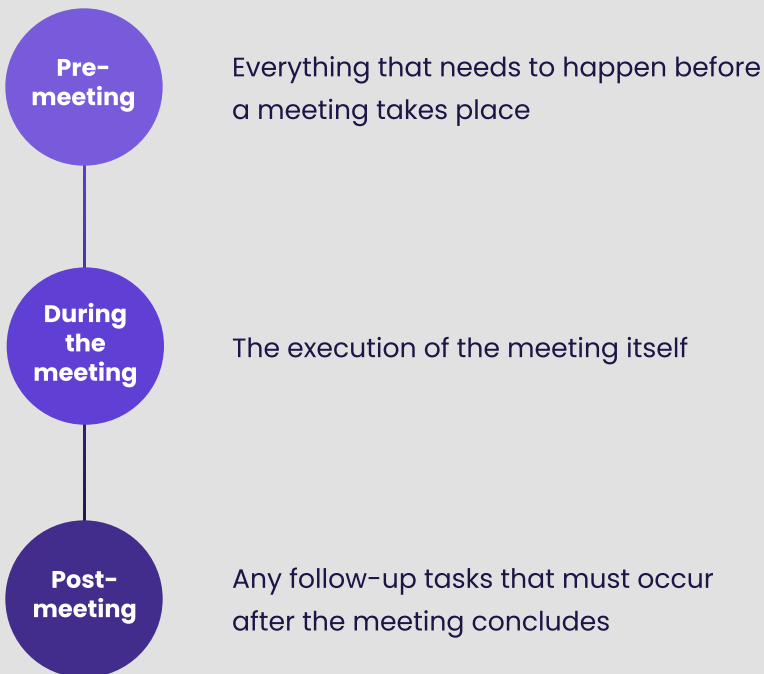
Part 1: What is Meeting Management Software?

Before delving into the many benefits of meeting management software, let's take a step back to examine what meeting management software is.

Meeting Management Software, Defined
At the most basic level, meeting management software is a category of software used by many organizations looking to improve the effectiveness and efficiency of their meetings. Meeting management software provides users with comprehensive tools and workflows (which we'll explore in more depth in this guide) that improve collaboration and efficiency throughout the meeting life cycle.

The Meeting Lifecycle
Meeting management software introduces efficiency to every stage of the meeting life cycle.

Pre-meeting
Everything that needs to happen before a meeting takes place

During the meeting
The execution of the meeting itself

Post-meeting
Any follow-up tasks that must occur after the meeting concludes

Today, meeting management software solutions are available for just about any type of organization. However, in this guide, we're focused specifically on meeting management software for public-sector organizations.

Each meeting management software solution offers different features and functionality – which we'll examine later in this guide. But here's a high-level look at some of the features of an effective meeting management platform.

1

Digitized Meeting Management

Today, many public organizations rely on inefficient, paper-based processes to prepare for meetings. Unfortunately, these processes waste time and money.

Meeting management software empowers organizations to create, share, modify, and collaborate on meeting materials – all digitally.

A study[1] found that organizations can decrease the print cost per meeting by 81%, on average, by leveraging meeting management technology.

[1] Regional Municipality of York (Ontario, Canada) "Effectiveness of Virtual Council Meetings and the Future Resumption of In-Person Participation"

2

Everything In One Digital Place

Often, meeting-related materials are stored in disparate locations, and organizations depend on email or shared drives for distribution. As a result, users often struggle to find the materials they need when they need them.

Meeting management software provides organizations with a single, secure platform to store all meeting-related documents, artifacts, and action items. That means administrators and participants alike can easily access the information they need.

3

Tools for Increased Collaboration and Transparency

There was a time when in-person meetings were the primary way for local officials to interact with those they served. However, only those available at a given time and location could participate in civic engagement opportunities.

Today, meeting management software offers tools like:
- Webcasting
- Closed captioning
- Request to speak
- Public comments

Features like these help organizations break down traditional barriers to accessibility and allow more citizens to get involved – right from the comfort of home. This not only boosts engagement but also improves transparency and trust.

Part 2: The Benefits of Using Meeting Management Software

If you're currently using manual methods to manage meetings, you may wonder if switching to meeting management software makes sense. In a word, yes.

Meeting management software significantly benefits public sector organizations and those they serve. Here are some outcomes you can expect from adopting meeting management software.

1

Digitized Meeting Management

Public officials work hard to plan and execute successful meetings. Despite these efforts, keeping public meetings on task can be challenging. Often, more time is spent shuffling paperwork and rambling on random topics than having productive discussions. These types of meetings leave attendees frustrated and less likely to engage in future opportunities.

> **A <u>survey</u>[2] of 182 senior managers found that 71% feel meetings are unproductive and inefficient. Though this survey wasn't specific to the public sector, it's likely a sentiment shared across many sectors.**
>
> [2] Harvard Business Review (Ontario, Canada)
> "Stop the Meeting Madness"

Meeting management software offers tools and workflows that make it easy for administrators to plan meetings. In addition, administrators can distribute meeting materials in advance, allowing all attendees to be on the same page from the start. Less time shuffling papers means more time to discuss issues, make decisions, and take meaningful action. In fact, a recent study[3] found that, on average, a municipality's council and committees could consider about 32% more items per meeting by leveraging meeting management software.

By leveraging meeting management software, a municipality's council and committees could consider about 32% more items per meeting.

[3] Regional Municipality of York (Ontario, Canada) "Effectiveness of Virtual Council Meetings and the Future Resumption of In-Person Participation"

2   Reduce Wasted Time and Increase Engagement

Managing the administrative tasks involved with meeting management takes time. This is something most people don't have much to spare. Meeting management software enables organizations to eliminate busy work (and save time) by capturing meeting items in digital format.

In addition, meeting management software offers features that enable attendees to participate more fully in meetings, whether in-person or online. Engaged participants are more likely to participate in future meetings.

3   Streamline Communication and Collaboration

Open communication between governments and citizens is essential. However, communication between these parties can be disjointed despite officials' best efforts. A citizen might request to speak at a public meeting – but then never really know what resulted from their input.

Meeting management software provides participants with tools to exchange ideas and engage in discussions that lead to meaningful action. These platforms also serve as a single source for all meeting materials – which means everyone can easily find what they're looking for and can reference materials in the future.

4   Enable Better Decision-Making and Accountability

Collaboration between citizens and elected officials helps ensure decisions are aligned with the community's needs and wants. Meeting management software offers tools that help ensure a broader range of perspectives is heard. These diverse perspectives help government officials make decisions that are in the best interest of their citizens.

Meeting management software also boosts transparency. Citizens have access to meeting materials – even if they didn't attend the meeting. This adds a level of accountability to meetings; elected officials are on the hook to deliver what they promised.

5   Enhance Meeting Follow-Up and Action Items

What happens after a meeting is just as important as the meeting itself. But, it can be challenging to keep track of follow-up and action items and ensure everyone is on the same page about what will be completed and when.

Meeting management software makes it easy for organizations to post meeting recordings, minutes, and other post-meeting items so citizens can view them at their convenience. This helps ensure everyone – even those who didn't attend the live meeting – are aligned on next steps and action items. It also increases accountability and transparency, helping to ensure all action items are completed as promised.

Part 3: Key Features of Meeting Management Software

As you begin your search for meeting management software, it'll quickly become apparent that you have many options. It's important to find a solution that's built for the unique needs of the public sector – and your organization in particular.

Each organization has different needs. However, there are some key meeting management software features that are important to nearly all public sector organizations.

Agenda Creation and Management

A solid agenda ensures attendees know what to expect and keeps the meeting on track. Meeting management software provides templates and workflows for creating and distributing agendas prior to each meeting. You can also incorporate last-minute changes (we all know they happen) without a complicated editing and redistribution process.

Participation Management

Collaboration fuels better decisions. But managing participants can be challenging – especially when you have folks attending in-person and via video conference. Meeting management software provides administrators with tools to encourage participation – while staying on task.

Artifact (Document) Collaboration

Meeting preparation isn't the job of one person. Instead, many people must collaborate to create the documents needed for any given meeting. But, real-time collaboration isn't always possible – or practical.

Meeting management software incorporates version control workflows that allow teams and individuals to more effectively collaborate on meeting documents – without printing paper and chasing people down for their feedback and contributions.

Minute-Capture

Keeping minutes ensures there's an accurate record of what happened during a meeting. But it can be challenging to keep minutes while staying focused on the meeting.

Meeting management software offers tools that allow you to take minutes directly within the platform. You can take notes, create tasks, log attendance, and mark motions in real-time – often automatically.

Live Streaming and Publishing Recorded Sessions

Meeting participation was once limited to those who could attend in-person. Meeting management software offers the ability to livestream and record sessions. That way, a greater portion of citizens can get engaged, regardless of schedule or location. Greater engagement leads to better decision-making.

Closed-Captioning

Citizen engagement opportunities should be available to all citizens, regardless of disability status. Meeting management software allows you to add automatically generated closed captioning to your livestreamed and recorded meetings – which provides greater accessibility to those with hearing impairments.

Managing Requests to Speak

A key reason citizens attend public meetings is to have their voices heard. In the past, requests to speak were formally submitted via mail. However, meeting management software provides request-to-speak features that allow you to manage debates, discussions, and public input in real-time. You can also set the speaking order and display how much time is left for each speaker.

Public Comments

Allowing for public comments helps boost transparency and encourages citizen engagement. But when public comments aren't well-managed, a meeting can easily go off the rails. With meeting management software, attendees can submit a citizen request form, which is reviewed and approved via an automated process.

Vote Management and Calculations

Voting is a common occurrence at public meetings. But manually managing and calculating votes is time-consuming – and leaves a lot of room for error.

Meeting management software offers rules-based voting that does the math for you. The best meeting management platforms integrate voting with roll call, check-in/out, and financial interest management, making recording votes easy. You can also increase transparency by graphically displaying voting results in real-time.

Action Item Tracking and Follow-Up

A meeting may be over. But that doesn't mean the work is done. There are a number of tasks and action items that must be checked off after the close of a meeting. Keeping track of these action items can be challenging – and some items may fall off the list completely. Meeting management software offers an integrated action log that allows organizations to complete post-meeting follow-up quickly and easily. In addition, action items are visible, which adds a layer of accountability.

Consolidated Organization of Hundreds of Meetings – All in One Digital Place

There are many documents associated with any given meeting. Multiply that by hundreds of meetings, and it's easy to see why documents are often hard to find. This is especially true when they're stored in multiple locations.

Meeting management software provides a single, secure, digital location where you can house all meeting-related materials for all meetings. That way, administrators and users alike can always find exactly what they're looking for.

Part 4: How Meeting Management Software Works

We've explored the key features of meeting management software and how those features, when combined, can deliver significant benefits to public sector organizations.

But how exactly does meeting management software work?

Perhaps the best way to illustrate this is to consider a fictitious public meeting and explore how various meeting management software features can be leveraged by administrators and attendees to improve the entire life cycle of the meeting.

Meeting Management Software Simplifies Every Step of the Meeting Life Cycle

Pre-meeting

Preparing for an engaging, effective meeting.

- For Administrators:
  - Draft and edit an agenda for the upcoming meeting using a template in the platform.
  - Collaborate on the creation of meeting documents.
  - Distribute the agenda and any additional materials via the platform.
  - Manage any late items or agenda changes.

- For Attendees:
  - Access and review materials prior to the meeting. That way, they have time to gather their thoughts and prepare any comments in advance.

During meeting

Executing a productive, engaging meeting that allows for collaboration between officials and those they serve.

- For Administrators:
  - Record minutes, motions, and actions.
  - Manage roll call, speaker lists, requests to speak, quorum, and conflicts.
  - Enable video streaming and webcasting (with closed captioning) to increase public access, participation, and transparency.
  - Support multiple vote types and display results in real-time.

- For Attendees:
  - Securely access meetings from any device.
  - Cast a vote, whether in-person or virtually.
  - Contribute to the conversation by posting comments and requesting to speak.

Post meeting

Closing the loop on the meeting.

- For Administrators:
  - Share minutes and any other key documents.
  - Post-meeting recordings that allow visitors to jump easily to specific portions of the agenda.
  - Produce an action log for follow-up items.

- For Attendees:
  - Easily access video recordings, meeting minutes, documents, and any other post-meeting items on their own time.

Meeting management software simplifies every stage of the meeting life cycle, making meetings more effective (and, dare we say, pleasant?) for all involved.

Part 5: How Meeting Management Software is Implemented

The benefits of meeting management software are clear. But how do organizations make the switch from manual, time-consuming processes to meeting management software?

There are a few steps you must take.

1

Step 1: Research Your Options

As we mentioned earlier, there are many meeting management software options. It's important to find an option that meets your organization's unique needs.

Weighing your options can seem overwhelming – whether you're shopping for your first meeting management solution or you're looking to replace your current software. This is especially true when you're unsure what features are most important.

The first step is to determine your priorities and pain points. Then, start meeting with different providers to find out how their platform's features can help you address your key challenges. The features we explored in part three of this guide can serve as a great starting point for ensuring a given solution has the foundational features for improving how you manage meetings. eScribe also offers a Buyer's Guide that can help assist you through your purchase journey so you can find the option that best suits your needs.

We've explored the key features of meeting management software and how those features, when combined, can deliver significant benefits to public sector organizations.

But how exactly does meeting management software work?

Perhaps the best way to illustrate this is to consider a fictitious public meeting and explore how various meeting management software features can be leveraged by administrators and attendees to improve the entire life cycle of the meeting.

Need help finding the right meeting management software for your public sector organization? The Public Sector Meeting Management Software Buyer's Guide will guide you on your purchase journey.

DOWNLOAD MY COPY

2

Step 2: Get Buy-In from Necessary Stakeholders

Purchasing any type of software is an investment. Meeting management software is no exception. As such, you'll need to get buy-in to make this investment.

Oftentimes, getting buy-in is easier than expected. That's because many executives understand the growing role of digital tools in improving effectiveness and efficiency.

But in some cases, it may be necessary to build a more formal business case that explains why now is the time to invest in meeting management software. Make sure your business case addresses the following questions:

- What is the proposed solution?
- Why does our organization need this solution?
- What is the estimated cost?
- What (if any) risk is involved with adopting this solution?
- What are our options?
- What internal resources are necessary to implement and manage the software?

After developing your business case, present it to key stakeholders for their comments and ultimately gain their approval.

3

Step 3: Choose Your Solution

After gaining executive buy-in and identifying the solution that best meets your needs, it's time to make a purchase.

4

Step 4: Implement Your Chosen Solution

Then, the next step is to implement your chosen solution so you can start deriving value from it.

Ideally, the implementation process should be relatively quick – with minimal effort on your end. In addition, your chosen provider should act as a partner throughout the implementation process (and beyond) to ensure you're set up to get the most value from the solution.

The implementation process will vary based on a number of factors, including whether or not you're switching from another meeting management platform. However, here's a high-level overview of what it might look like.

Sample Implementation Checklist
Getting up and running with your chosen meeting management software

Pre-Assessment

Make a plan for what you're seeking for in your meeting management platform. Consider your goals and any gaps in your current processes.

Configure Your Chosen Platform

Customize your platform to make it yours. This includes incorporating your organization's branding. In addition, implement roles and approval flows – and set up templates.

Develop Change Management Plan

Change isn't always easy. Set yourself up for success with a solid change management plan. Determine a timeline for when your platform will roll out and communicate this timeline to your staff. Then, assign ownership of each element in the change management plan.

Collect and Migrate Data

Determine what data you'll need to migrate to your new platform. Work with your new vendor to take your saved data and import it into the platform. Spot-check to ensure everything works as it should.

Train Your Teams

Ensure all teams understand your new processes and how to use your new platform. Your new software provider should provide training that makes it easy for your users to get up and running.

Launch Your Solutions

Launch your new meeting management software – and start delivering more effective, engaging, and accessible meetings.

Remember:

You shouldn't have to go it alone! The best meeting management software vendors have developed tried-and-true formulas for getting public-sector organizations up and running quickly. In addition, they provide ongoing support and education to ensure your users are getting the most value for the solution. Be sure to ask potential vendors plenty of questions about the implementation process – as well as what you can expect in terms of post-purchase support and education.

The Bottom Line

Effective meetings are key to strong collaboration between public organizations and those they serve. But for many organizations, executing effective meetings is challenging.

All too often, elected officials, city clerks, and local government staff sink time into manual administrative tasks in an effort to adequately prepare for meetings. Yet, their meetings are unengaging and unproductive.

Now's the time to make the switch to digital meeting management by adopting meeting management software. With the right solution, you'll be empowered to deliver effective, engaging meetings that increase collaboration and fuel better decision-making that benefits the entire community.

Now What?

Ditch time-consuming, costly, paper-based processes. Now's the time to transform the meeting management life cycle.

Ready to learn more about how the right meeting management software can revitalize your public meetings? Explore our end-to-end meeting management solution designed specifically for the public sector.

LEARN MORE