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We've Got to
Have a Meeting.
How Do We Ensure
that It Is Productive?

We've Got to Have a Meeting. How Do We Ensure that It Is Productive?

Brian Denis Egan, Global Knowledge Instructor, MBA, PMP



Introduction

A meeting will not be successful unless someone has put some effort into its planning. Most meetings are undermanaged. If any other business activity were as poorly managed as the average meeting, those responsible would have their careers seriously abbreviated.

The effectiveness, productivity, and ultimate success of a meeting is directly related to the amount of planning. Someone must take management responsibility seriously.

This paper introduces the four stages of meeting management: planning, preparation, process management, and follow-up. It will explain deficiencies that can result during each stage and how to ensure each stage is effective.

Background

This paper follows from an earlier white paper titled *How to Avoid Meetings – Or at Least the Unproductive Ones*, by Brian Denis Egan, available at www.globalknowledge.com/resourcecenter. In the first paper, the subject of how to determine whether or not a meeting is necessary is discussed.

The following is a continuation of that paper. Here, the focus is on what to do (how to manage the process) when a meeting is necessary and you are responsible for its effectiveness.

Definition of "meeting"

This discussion relates to typical business meetings (hereafter referred to as meetings). These are the gatherings of colleagues, staff members, and suppliers (service companies), who are a routine part of the business process.

Business meetings are attended out of necessity. They are for discussion and decision making. Meetings are meant to be productive. They are supposed to have defined purposes and result in measurable outcomes or benefits.

Value control

As in all business activities, the success, or value, of a meeting is the net of benefits after considering costs.

Costs include everyone's time to prepare for, travel to, and attend the meeting, plus the direct costs of hosting and organizing a meeting, plus the opportunity costs of what everyone in attendance might otherwise have been doing.

The benefits are the quality and quantity of decisions made and task assignments completed as a result.

The value generated by meetings is maximized by management practices that focus on an efficient and effective process that remains targeted on generating meaningful outcomes and ensuring that someone acts upon the follow-up steps.

Why meetings fail

Organizers of most business meetings focus their efforts on gathering people together. Details of what will happen when everyone is together are left largely to chance or to a vague plan.

Management failings come in four flavors that relate to the four stages of meeting management.

Stage 1: Planning

Planning involves asking and answering questions related to why, when, who, where, and how. Planning is about strategy and ensuring that the meeting has meaningful outcomes that are achievable.

Deficiencies that can result from poor planning

- Unclear objectives – meetings are called without a clear purpose
- There is no agenda or plan to guide activities during the meeting
- Too many people present. Complexity of a meeting increases exponentially with the number of people present
- Too many topics to cover for the time allotted, resulting in hurried decisions or time overruns

Stage 2: Preparation

Preparation is about getting buy-in from critical participants. It is also about the development of a practical agenda. It involves polling attendees and making sure that everyone is prepared for the meeting.

Deficiencies that can result from poor preparation

- Meetings are boring, either due to the subject matter or its presentation
- People are unprepared to participate in the discussion or decision making
- Presentations and handouts are crude and ineffective, making it impossible to reach useful decisions

Stage 3: Process

Process management relates to the running of a meeting. When should the meeting start, who should do what, and how should it be done? A skilled facilitator is needed to ensure that meetings are productive and end on time.

Deficiencies that can result from poor process management

- No one in command to ensure that objectives are met
- Discussion of issues is confused with analysis and therefore decisions are slow and of poor quality
- Participants are uncooperative or antagonistic toward the purpose of the meeting
- Distractions and interruptions prevent the meeting from progressing productively
- Ideas are attacked on a personal basis rather than being discussed on a professional level
- Meetings are needlessly long, wasting everyone's time
- Discussions wander, wasting time and confusing objectives

Stage 4: Follow-up

Follow-up is all about follow-through. All too often a successful meeting is ultimately a failure because task assignments were not completed. Meeting managers must take responsibility for tracking task assignments through to completion.

Deficiencies that can result from poor follow-up

- Assignments are left unfinished
- Next meeting re-hashes old issues

The reasons that meetings are often unproductive relate to a lack of planning, preparation, and control of the process. In the discussion below the four stages of meeting management are outlined as guidelines to efficient and effective meeting management.

Stage 1: Planning

Planning is not optional; it is critical for a meeting to achieve real results. Planning is not time wasted—it prevents meetings from being a waste of time.

Meeting outline

Planning is about making sure that each of the points in the meeting outline (see below) has been analyzed. The planning stage is when ingredients and processes are formulated. The use of an outline to guide the development process helps to ensure that important ingredients are not overlooked.

The planning process is accomplished by asking and answering questions posed by the outline below.

Why:	Purpose Outcomes
When:	Date Times
Who:	Organizer Sponsor Participant Register
Where:	Location
How:	Format of meeting Layout and equipment Estimated costs
Props:	Agenda Review materials

Why - Purpose

The purpose of a meeting is made clear by considering outcomes. For example, the organizer of a meeting planned for bringing sales reps up to speed may not have any specific outcomes in mind. If that is the case, then there is no real purpose, and a meeting is not appropriate.

Either there are specific measurable outcomes that require a meeting, or a meeting is unnecessary. If you are unable to quantify the benefits (behavior change, increase in knowledge, etc.) that a meeting will generate, then perhaps you would be better off circulating a letter. Your

audience won't be any less informed than they would be after a poorly organized meeting, and a letter is a lot less expensive and time-consuming to organize. It may even be more effective than a poorly-run meeting.

Why - Desired outcomes

Outcomes follow from purpose. They are the results (benefits) of having a meeting.

Outcomes must be measurable and feasible. Measurable means concrete—an increase in sales calls or consensus on a course of action. An objective of bringing people up to speed is not specific enough. Who do we mean? With regards to what? Why do they need to learn more about the subject?

Outcomes must be feasible. It is not possible to make 500 decisions in a four-hour meeting.

The outcomes of meetings are typically decisions or instructions. Decisions are acted upon through action items (instructions that lead to task assignments).

Action items are the next steps that must be completed if the outcomes of a meeting are to be accomplished.

In order to produce results, action items must be assigned to individuals and given completion dates. They cannot be left open.

For example, for a meeting held to train sales staff to be more effective salespersons, the objective might be an increase in sales volume. The desired outcome of the meeting would be a specific rise in sales volume, such as 5% over the next three months, or a 5% increase in customer contacts or price quotes being generated.

The decisions that are arrived upon during the meeting relate to the behavioral change that the meeting organizers are trying to illicit on the part of the participants. The organizers want the participants to decide how to improve their sales performance given new information that is presented at the meeting.

Action items are the specific activities that salespersons are expected to take to improve sales performance.

Task assignments relate to the monitoring of results to ensure that the desired increase in sales has been realized, and if not, then why not.

When

Timing is crucial to determining who will be able to attend.

There is no point in arranging a meeting if critical players will not be available. There cannot be a meeting without a place to meet.

Very early in the planning process it is necessary to determine when the required facilities and critical participants are available.

Potential conflict with external events should not be overlooked. A budget planning meeting just before a quarterly performance review might be a waste of time if capital allocations are likely to be revised. Christmas Day and July 4 are also bad days for meetings.

Also, some times of day are more productive than others. Try to meet in the morning, as early as possible. If you must meet in the afternoon, schedule the meeting as close to the end of the day as is practical. It is amazing how much will be accomplished when participants are using their own free time.

Who

Meetings need to have a senior sponsor, or several sponsors. The larger the meeting, the bigger the budget, and more senior the sponsoring authority.

It is important to include the names of sponsors in meeting documents. This will convey the importance of a meeting and will add incentive for people to attend.

No meeting should be held without the support of management senior enough to ensure that key participants will attend and cooperate.

The meeting organizer or manager is the person who does the leg work and is held responsible for the efficiency and effectiveness of a meeting. They may not be senior enough to ensure cooperation, so another senior management member may need to be included.

Who – Participant list

The participant list is often tricky to put together. Ideally, there should not be too few or too many attendants. There are people who must be there, some who should be, and some who want to be. Recognizing which category potential participants fall into greatly simplifies the management of a meeting.

When creating a meeting plan, evaluate the real reason for inviting each participant. The amount of effort that goes into ensuring that person's attendance is related to the level of importance of his or her presence to the meeting's outcomes.

In general there are three categories of participants: essential, desirable, and optional.

Essential participants are just that. The meeting is pointless without them and will be cancelled or delayed if commitment is not received. They may be managers, decision makers, technical experts, advisors, record keepers, or the meeting facilitator.

During the meeting preparation process, critical participants are repeatedly contacted to gain their buy-in and commitment.

Desirable and optional participants are invited to attend but their attendance is not crucial.

It is a good idea to clearly indicate to participants into which category they fall. Do not pretend that everyone is critical. No one wants his or her time wasted. Your honesty will be appreciated.

Participant register

The role of the register (see below) is to help you, as meeting manager, record the reasons for inviting each participant and the efforts made to extract commitment from them.

A participant register lists participants by whether they are essential, desirable, or optional. It also provides an explanation of each participant's role at the meeting and how much effort was made to gain commitment.

Distributing the register is a great way to let participants know how important you think it is for them to attend. It illustrates that you value their time and respect their judgment with regards to attending. It also shows how well-organized the meeting will be, and encourages attendance.

Meeting Purpose:	<input style="width: 100%;" type="text"/>	Date:	<input style="width: 100%;" type="text"/>	Time:	<input style="width: 100%;" type="text"/>
Organizer:	<input style="width: 100%;" type="text"/>	Location:	<input style="width: 100%;" type="text"/>		
Sponsor:	<input style="width: 100%;" type="text"/>	Est. Budget:	<input style="width: 100%;" type="text"/>		

Participant Register		Contact:	
Essential Participants:	Role:	e-mail/phone/mail:	Confirmation
<input style="width: 100%;" type="text"/>	Manager	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
<input style="width: 100%;" type="text"/>	Decisions	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
<input style="width: 100%;" type="text"/>	Expertise	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
<input style="width: 100%;" type="text"/>	Input	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
<input style="width: 100%;" type="text"/>	Facilitator	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
<input style="width: 100%;" type="text"/>	Recorder	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Desirable Participants:			
<input style="width: 100%;" type="text"/>	Advise	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
<input style="width: 100%;" type="text"/>	Input	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
<input style="width: 100%;" type="text"/>	Observe	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
<input style="width: 100%;" type="text"/>		<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>

Where

There are three main criteria to consider when choosing a location: size, formality, and cost.

Big meetings, with hundreds of people in attendance, can only be held in conference centers. Small meetings can be held essentially anywhere.

The choice of location depends on the objective(s) of the meeting. Formal occasions, such as board meetings, require a suitably formal setting. Motivational meetings, where the attempt is to engender team spirit, can and should be held in informal settings such as theme parks.

The location must serve the purpose even if the budget limits your options. If the budget is too small, then some meetings are impractical. A motivational meeting for 20 new hires cannot be successfully held in a tiny boardroom.

How

The format of a meeting plays a big part in its success. A meeting to present facts and discuss outcomes is very different from one intended to brain-storm new ideas. The physical arrangements should therefore be very different. Decide what needs to happen at the meeting, and arrange the room accordingly.

Seating arrangements should reflect purpose. Seating participants at a round table is best for discussion among equals; an oval seating arrangement is best if there is to be a leader; a rectangular set-up is most suitable for negotiations.

Small groups are best when there are several topics to be discussed, and when you want very active participation. Large groups are better for creative problem solving.

Presentation aids are always helpful. These range from flip charts, to overhead projectors, to movies, and even to live performances. The more variety that is included in presentations, the greater will be the interest level of participants.

In terms of duration, eight hours is a very long day of meetings. If you cannot break up the meeting between days, then plan on two hours for lunch and a 15 minute break every hour. Breaks are not wasted time; they make the time in-session more productive.

If the evening is available, do not try to create a longer day. Instead, stretch out an eight-hour day. Give participants the afternoon off because that is the least productive time of day.

Refreshments help keep people comfortable and attentive. Make the refreshments simple, healthy, quiet, and convenient. Hot dishes that require cutlery are not simple. Candy is not healthy. Excess packaging is not quiet. A buffet that is two floors down and requires a pass key is not convenient.

The further removed the meeting can be from day-to-day distractions, the better it will run. The location does not need to be physically remote, it just needs to seem that way. Ask everyone to turn off their phones and pagers. Put a "do not disturb" sign on the door and lock it.

Prepare a budget after you know what the format will be. Put the estimated budget on all meeting documents. There is no better way to encourage people to take a meeting seriously than by treating it as a big investment.

Props

There are two essential props that are necessary for productive meetings. These are a well-organized agenda, and suitable background materials. Both need to be developed with the assistance of participants prior to a meeting.

A draft agenda is distributed to participants (as part of an initial meeting plan) and their input is requested. As the iterative development process proceeds, the agenda becomes more refined and more rigid.

By the time a meeting starts, the agenda is fixed. Everyone has had an opportunity to give his or her input. New issues that arise at the meeting are tabled for future meetings.

Background materials prepare participants for a meeting. These must be distributed or made available to all participants well in advance of the meeting date. Everyone should arrive fully informed about the topics to be discussed and decisions that need to be made.

Meeting time should not be spent filling people in on background information.

Help participants to be well-prepared. Make information readily available to everyone. Explain exactly what needs to be done in order for them to be prepared for the meeting. Clarify why preparation is important.

Stage 2: Preparation

The planning process (analysis) leads into preparation. From the analysis comes a draft meeting plan which contains:

- a meeting outline (one page)
- a draft version of the participant register
- a draft version of the agenda
- background materials

Meeting preparation includes five steps that revolve around the need to develop a group consensus on the necessity and purpose of a meeting (no consensus, no meeting).

1. Distribute draft meeting plan—request **input**
2. Poll critical participants for **buy-in and commitment**
3. **Revise** meeting plan
4. Prepare and distribute **finalized plan and background info**
5. Send out **reminders** and preparation instructions

The preparation process begins by ensuring critical people are on-side. A draft meeting plan is distributed to key players, who are asked for their input.

If key players are not on-side it is reasonable to question whether or not to go ahead with the meeting. Poll the critical participants to make sure they are satisfied by what is being planned. Get their commitment before expending more resources on the meeting.

Ensure buy-in by modifying the plan to meet the needs of critical players. Several iterations may be necessary before a final or working version can be prepared.

Remind participants of the meeting at regular intervals.

A few days before the meeting, distribute the final meeting plan (outline, agenda, participant register, and background materials). Include a cover letter explaining what preparations need to be completed before the meeting. Do not leave anything to chance.

Agenda

An agenda serves as a road map for a meeting. Agenda items are listed in the order in which they will be covered. Time allotments are given for each item, along with the names of people responsible to speak and answer questions.

A detailed and accurate agenda allows peripheral participants to attend only portions of a meeting. Most resource people (subject matter experts) do not need to be present for the entire meeting. Knowing when these people are needed makes best use of their valuable time.

Meeting:	<input type="text"/>	Date:	<input type="text"/>	Time:	<input type="text"/>
Organizer:	<input type="text"/>	Location:	<input type="text"/>		

Agenda

Item	Outcome needed	Time slot	Speakers	Resource persons	Preparation
Review of resumes for service mgr pos. in whs div.	short list of 10 for phone interviews	8:30-9:15	Allison Walker	Steve Barrymore Elvis Stoico	Select your top ten choices
Break		9:15-9:30			

Agenda sequence

There are two schools of thought when it comes to sequencing agenda items. Some believe the most important or difficult items should be discussed first. Others believe you should begin with a couple of simple issues before trying to tackle tough stuff. You decide which way will work best for your meetings.

Agenda timing

The most frustrating agenda problem is deciding how much time to give each item. Either over- or underestimating will cause problems.

A meeting that moves along ahead of schedule is more tolerable than one that falls behind. The rule of thumb is to give critical items a generous amount of time. Non-critical issues should be held in reserve (unscheduled) to use up surplus time.

Advance preparation

A successful meeting requires effort on the part of the organizer and the participants. Do not be shy about giving "homework". Everyone should arrive well-informed about the issues to be discussed. If you suspect some haven't done their homework, go on as if they have. Next time they will.

Keep the required background reading and preparation time to a minimum. Treat participants' preparation time as valuable. For those who want more information, provide links to web pages or offer to forward additional material. Give everyone what they need to be productive at the meeting.

Giving participants a list of discussion questions is a good way to have them think about issues in the context of decisions that must be made. For each agenda item, list the central question that is being addressed, with one or two sub-questions.

Be sure to explain what to bring along to the meeting, such as personal planners, calculators, and laptops.

Make sure that advance preparation is clearly explained in a cover letter, and is as easy to complete as possible. Help participants to be ready.

Handouts

Try to avoid last-minute handouts. The more handouts there are, the less well-prepared some people will feel. Others will use last-minute handouts as an excuse for not participating in discussions.

Distribute a minimal amount of paperwork at meetings. Hand it out only after everyone is present, and just before it is needed for a specific agenda item. Immediately provide time to read the material. Explain how the material relates to the issues, and offer to answer questions. Move on only after the new information has been digested.

Presentations

The rules for presenting new information at a meeting are the same as those governing presenting in any setting. Do not expect the audience to absorb very much. Complex subject matter must be provided as review materials to be studied before meetings.

Avoid providing raw data. Some people love it and can spend hours pouring over it. Do not let this happen. Complete the analysis before the meeting, and debate the implications of the results, not the raw data.

Business meetings are not training events. Presentations should be limited to reviews, recommendations, and proposals. If training (study) is necessary, it should take place before hand.

Stage 3: Process Management

Process management begins when the meeting starts and is made possible by planning and preparation. Success (effectiveness) is planned into a meeting and ensured by process management.

Process ingredients

The ingredients of a well-run meeting are listed below. The degree to which these ingredients are professionally addressed determines how well a meeting will proceed and, ultimately, how successfully the outcomes will be addressed.

Agenda - Items to address, and time allocated to each

Facilitator - Leads discussion through agenda, sets pace

Presentations - Speakers, SMEs, review of findings

Decision-making process - E.g. 90% consensus

Record-keeping - Tape recorder, written, guest registry

Task assignments - Assign tasks and clarify reporting process

A solid agenda is key to knowing which tasks need to be accomplished, and in what order.

The facilitator actually manages the meeting. The facilitator may be the meeting organizer, or someone else. Whatever the case, there must be a clear center of authority. Someone must run the meeting.

Presentations, if there are any, need to be prepared in advance and be well thought-out.

At the outset, there must be an agreed upon process for decision-making. For example, where there is not a complete consensus, then a 90% majority will be sufficient to finalize a recommendation.

The meeting must be recorded. The level of detail depends on the nature and sensitivity of the meeting.

At the end of the meeting there must be a list of actions that follow from the decisions made or processes put into motion. These actions relate to tasks. Each task must be assigned an "owner", and have a fixed timeline for completion.

Roles

Everyone at a meeting must understand his or her role. If there is anyone at the meeting who does not have a specific role, he or she should not be there.

The participant register outlines everyone's intended role. At the beginning of meetings it is desirable to review important roles, particularly for those people whose presence is not needed throughout the entire meeting.

No one is more vital to the success of a meeting than the facilitator. It is this person who determines whether the meeting goes off like a symphony or a riot.

Facilitators or chairpersons serve the purpose of referees and coaches. They stop and start discussion, steer the subject of discussion back on course when it goes astray, and enforce proper decorum during the meeting. Without a good facilitator even a well-planned meeting can disintegrate.

The facilitator is not necessarily the meeting manager. They can be anyone who understands the process and has the authority (real or imagined) to impose order on the meeting.

Choosing different people to serve as facilitators for various parts of a meeting is a good way to encourage cooperation.

Opening

Always start on time. Some companies charge a cash fee to late arrivals. Others begin when a quorum of participants is available. Do not encourage bad manners by waiting for stragglers.

Start off by introducing special guests and then quickly move on to housekeeping issues.

Before starting the agenda items, the facilitator should explain the rules of conduct, such as decision-making and speaking rights. Then the items on the agenda are each addressed as planned.

Pace

A meeting should feel like it is moving along at a good pace. There needs to be a sense that participants are accomplishing something. If the agenda is too slow, step it up. Never let items go over their allotted time, or there will be a domino effect.

At the beginning of the meeting, the facilitator needs to make a time commitment for ending the meeting and should ask for a commitment in return. Regular breaks are given in exchange for undivided attention. Do not let the meeting run over that previously agreed-upon length.

Unless there is surplus time at the end, anything that was not on the agenda must be tabled for another day.

The facilitator sets the pace and keeps the meeting moving. Productive meetings move quickly.

Ending

There must be a recap at the end. A review is given of what has been covered and what results (decision, recommendations) have been generated. The facilitator makes sure that the main points and conclusions are generally understood and agreed upon.

The facilitator reviews what has been agreed to, and makes sure it has been properly recorded.

Record

The record that is kept will reflect the agenda items that were discussed. Each major issue should be recorded both in terms of any decisions made, as well as the process used to arrive at those decisions. The outcome (task assignment) will then have a clear history and validation.

Below is a list of the information that should be recorded for each agenda item.

- Agenda item (name)
- Summary of presentations made
- Attachments—supplementary information
- Topics of discussion
- Summary of discussions
- Problem statement
- Problem analysis—highlights
- Solutions suggested
- Decision criteria
- Resulting task assignments

Stage 4: Follow-up

Soon after the meeting, a condensed version of the meeting record should be distributed to all participants. The purpose of this document is to recapitulate the decisions reached at the meeting, not to remind everyone of what was said and done.

Important participants are asked to sign off on the record. This confirms their understanding of the tasks that are going to be undertaken as a consequence of the meeting. It also serves as a formal record of the meeting and its benefits.

Controlling outcomes

The outcomes of a meeting are action items, or tasks. In order to make sure that these tasks are accomplished, it is necessary to assign ownership of tasks to individuals. One person may be responsible for several action items, but someone must be made responsible for each and every one.

To ensure that the tasks are completed properly, it is necessary to have performance measures included in the task definition. For example, if the task is to get price quotes on the purchase of a particular type of machinery, then the performance measures might be the acquisition of five independent price quotes.

A time line must be included in task definitions. When is the task to be completed?

Milestones are used to drive progress reports. They are established as points at which some event or activity is to take place and require that a report be filed on the progress of a task assignment. An example would be reporting on the number of price quotes that have been received two weeks after the conclusion of a meeting, then again at four and six weeks.

If milestones are missed, the meeting manager is responsible for pursuing the matter with the task owner.

Every effort must be made to ensure that the outcomes of a meeting (tasks) are carried out, or the meeting will ultimately have been a failure.

When to Call in the Pros

Meetings must be managed well in order to maximize the value generated by the investment. The more complex a meeting, the more time required for its planning and execution. For example, a five-day meeting of 15 people at an unfamiliar location could take two full weeks to organize, even before doing the research and preparing the content.

The expertise and time required to organize meetings has resulted in an entire industry being dedicated to providing meeting services. If the budget allows, all you need to do is concentrate on content and others will take care of the details.

When should you call in the pros? The answer depends on your experience and the opportunity costs of the time you could be spending on other things. Meeting managers are not inexpensive, but neither is your time.

Overview

Some meetings are best avoided. Make sure the ones you organize are necessary, and then plan and run them well.

Planning starts with the development of a meeting plan. The plan will include a meeting outline, agenda, participant register, and background information.

Facilitators set the pace and determine the productivity of meetings. The more skilled the meeting facilitator, the less detailed planning needed. However, the best meetings are both well-planned and well-run.

A meeting is a failure if action items are not completed. Do not drop the ball at the last minute. Take responsibility for details, right to the bitter end. Then the meetings you are responsible for will have been good investments.

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About the Author

Brian Denis Egan is a partner in the firm of Briny Deep Consulting, a management-consulting company, and is the principal shareholder and President of the Book Box Company, a world leader in the manufacture and distribution of recycled book giftware.

As a management consultant, Brian provides strategic analysis and training services to businesses that are investing in information technologies.

He is also a course developer and instructor for Global Knowledge.