

Effective Meetings:



Improving the
Daily Grind

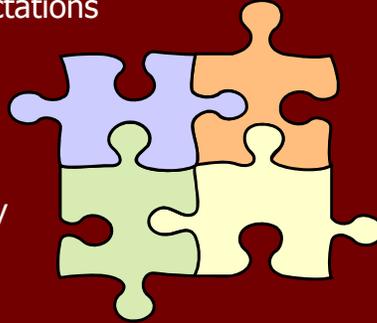
Why we should care

- 11 million+ meetings a day in North America
- Cost = undone work + total hourly salaries + 33% for salary overhead @ 5 people = \$300
- "Opportunity cost" – what they missed
- \$37 billion wasted annually
- Training to improve meetings = increase over-all productivity (58%) & reduce meeting time (28%)
- Average professional person attends 47 meetings a month – more than 2 a day

*Don't hold a meeting for meetings sake alone!
Cancel it!*

Pieces of the puzzle to consider

- Meeting types & structures
- Meeting places & meeting times
 - Importance of appropriate space
 - Importance of productive time
- Outcome and performance expectations
- Essential meeting tools
 - Agenda
 - Facilitation skills
 - Minutes
 - Evaluation
- Meeting processes & functionality
 - Leading a meeting
 - Participating in a meeting
- Alternatives to meetings



Types of Meetings

- Formal or Official Meetings
 - Roberts Rules, established protocols
 - Legal issues, by-laws, audience
- Informal/Working Meetings
 - Informational
 - Problem-solving
 - Decision-making
 - Proposal for review
 - Arbitration/negotiation – rules or roles determine who
 - Team-building or establishing group identity

Formal meetings

- Board meetings (library, association, etc.)
- City council, county commissioners
- Annual meetings dictated by law – stockholders
- Town hall meetings, hearings, other



Characteristics of formal meetings

- Roberts Rules of Order
- Rules, laws, by-laws, other documents
- Quorum necessary to do business
- Leader & members officially predetermined
- Legal proxies often allowed & encouraged
- Detail reporting of events & decisions – formal minutes that need approval
- Guests attend (media, citizens, others)
- Formal votes taken & recorded
- Issues likely to be policy/official
- Other?



Characteristics of informal meetings

- Group decides rules, manner to conduct business
- Group decides expectations
- Leader & members may vary based upon tasks & meeting purpose
- Consensus/general agreement for decisions
- Issues likely to be practical rather than policy
- Proxies unusual
- Seldom an audience
- Formal minutes not necessary
- Other?



Informational meeting



- Stand up meeting
- Email instead
- Intranet – daily announcements
- Quick
- Not interactive / not “working” - reporting
- Other

Only rational defense for interrupting work for an information dump is if your employees cannot read!

Problem-solving meeting



- Invite the *right* people – those with pieces of the puzzle (information, understanding, first-hand experience)
- Problem identification or diagnosis
- Creativity is key
- Both big picture & detail individuals
- Individuals with authority to approve action or take solutions to the top

If not about attacking problems or issues, meetings are about boring employees!

Decision-making meetings

- Invite the *right* people, those who can approve directions, clarify boundaries, grant resources
- Invite those responsible for carrying out the decision
- Essential information must be shared ahead of time for study, data gathering, input from others
- Expect readiness for decision-making



Proposal review meeting



- Invite the *right* people
- Be sure there is understanding of the background information, process to this point, reason for the proposal, timeline
- Purpose of meeting is to outline adjustments, necessary changes, approve further action
- Might involve confidentiality, contracts
- Much like decision-making meeting

Team-building or establishing group identity meeting

- Still needs focus & work to do (combine with other meetings?)
- Facilitator invaluable in process
- Shared understandings take time to develop
- Be clear about purpose even in this case
- Wasting time in meaningless content builds frustration not group identity
- It should still be *work*
- Cannot be indefinite process
- Other ideas?





For all meetings – first have clear expectations

What is to be the product? Purpose? Goal?

- Put it on the agenda – be specific
- Provide materials to inform before the meeting
- State goal at the beginning of the meeting
- Expect preparation
- Be clear about meetings as work
- Require focus (handle side talk, distractions)
- Summarize the results at the meeting's end
- Thank participants for focusing

How do we conduct meetings?

- Let participants develop behavior expectations.
 - Civility, courtesy, kindness, manners
 - Starting and ending on time
 - Being prepared
 - Being productive and positive
 - What else?
- Post expectations for each meeting initially.
- Invoke expectations when necessary to change behavior.
- Do meeting evaluation at end to move towards continuous improvement in meeting performance.

Meeting evaluation

+	Δ
<p>(What we did well. What went well)</p> <p>Started on time Everyone participated We completed task Everyone came</p>	<p>(Ways to improve or change)</p> <p>Finish on time Stop side conversations No interrupting Agenda out at least a day before meeting Tools should be in room Some left early People had phones on We got off track We didn't stick to schedule</p>

Meeting places that "work"

- Meeting room
 - Visible clock – minute & second hands
 - Computer, projector, screen
 - Paper, tape, phone
 - If not well acquainted, name tents
 - White board and/or flip charts – pens
 - Tables, chairs, good lighting (not too bright)
- Hallway or gathering point
 - Information sharing – standup
 - Routine "quick & dirty"
- Away & isolated to some extent
 - Retreat to "advance"
 - Long sessions requiring focus



Time for meetings

- Productive time of day & day of week/month
 - Not first thing in the morning or last thing in day
 - Not first thing Monday morning unless emergency
 - Usually not pay day (people have errands to run)
 - Not Friday or before a holiday
 - Prior to lunch or other regular event often works well
- Appropriate length of time
 - One hour is typical but less is great
 - If 90 minutes or longer, schedule a short break
 - If 2 hours or longer, have refreshments (at least H₂O)
- Appoint a timekeeper
 - Signal when agenda items need to close
 - Track length of comments by individuals if necessary

Agenda



Every meeting!

Place, date, time, attendees!

Purpose: To decide . . . To explore . . . To find a solution for . . . To plan . . . To review . . . but never, ever "to discuss" something.

List no more than 4 items (usually 45- 60 minutes).

Post agenda on flip chart or board to refer to during the meeting & ✓ off as you go.

Distribute at least 24 hours ahead.

Identify action items.

Identify personal responsibilities – presentations, data.

Designate specific times for all agenda items.

Effective meeting closure

- Summarize what was accomplished.
- Remind everyone of assignments.
- Determine exactly or approximately next meeting date, time, place (if applicable).
- Evaluate meeting + Δ
- Express appreciation & thanks for time and effort.
- Follow-up, follow-up, follow-up.

Minutes

Place, date, time (from – to)

Who attended, who did not

Agenda item	Action/decision	Assignment
Decide timeline	July 1-Nov 10	Jim prepare PERT
Review steps	Added #19-22	Sue revise doc
Determine next steps	Order software	Jane do PO

Meeting evaluation - what to improve:

Start & end on time

Be prepared

Complete assignments

(list all in the Δ column of evaluation for each meeting)

Planning a meeting . . . maybe



- Is a meeting necessary?
- What is the purpose?
- What is the product to be?
- Relationship to long-term goals / mission?
- Who should be there?
- Who will lead? Be recorder? Scribe?
- Where will we have it & when?
- What will the agenda be?
- What other information is needed to prepare?
- What will happen to the "results" – next steps?

Alternatives to meetings

- Standup meetings – quick, exchange info
- Lunch or other events/tasks/projects to build team
- Use all that expensive technology!
- Require supervisors to do "walkabouts" to see what is happening, to speak with individuals, to share information as needed, to build relationships
- Conference calls
- Teleconference broadcast
- Software for online meetings
- Polling individuals



Facilitation skills

- Train people to lead meetings effectively.
- Teach people to handle the “types” in meetings.
- Give people skills for dealing with problems.
- Establish organizational expectations re meetings.
- Good meetings generate energy & have products.
- Hold group & individuals accountable for meeting behavior.
- Be a role model.
- If necessary, hire an organizational consultant to attend meetings & give whole group feedback.

Minimizing the disadvantages

Identify what your group perceives to be the major disadvantages of meetings via:

- In person meetings
- Conference calls (telephone)
- Teleconference via video transmission
- Software meetings

Brainstorm ways to minimize the negative aspects of each type of meeting.

Decide on the best ideas to implement.

Hold employees & “members” responsible for meeting behavior. Accountability!