MANAGING EFFECTIVE MEETINGS

Meetings consume thousands of dollars each year – in some organizations, hundreds of thousands of dollars. In fact, studies have shown that meetings are the single largest cost center for many organizations.

Take a minute to think about how much time you spend in meetings. Shouldn't your meetings always be productive? How can the largest cost center not yield a high return on investment? The answer is that many people haven't learned the tools to manage meetings effectively.

This invaluable tool helps managers create and manage effective meetings. It describes the five types of meetings, how to put together an effective agenda, and the roles of the meeting leader.

Introduction

Most people would rather not meet for lengthy periods. They prefer that communication somehow occur without sitting down to talk. But the reality is, meetings need to occur because they add value to the organization. How do they add value? Primarily in five ways:

- By advancing goals and objectives (e.g. planning and implementing major projects and initiatives);
- By improving capacity (e.g. improving coordination within or between units, clarifying roles and responsibilities);
- By building internal intelligence (e.g. understanding how a potential policy change may affect other teams and teammates);
- By building teamwork and trust (e.g. building confidence that team members can rely upon one another);
- By resolving issues (e.g. addressing opportunities and challenges).

Meeting Purpose

An effective meeting starts with clarity of purpose. Ask yourself: Why are we meeting? Translate that concept into a written purpose statement that you communicate in advance of the meeting to everyone involved.

Here are some examples of meeting purpose statements:

- To determine the team's work priorities for the week.
- To share updates from the executive team and consider if any changes have an impact on our team.
- To address inconsistencies in the way we determine program eligibility.
- To plan our holiday party.

If you are unable to articulate to yourself why you want to meet and what you hope to accomplish as an organization, then do **not** meet!

Consider making a list of all standing meetings you have with others and evaluating together the clarity of purpose each has. You will likely find that some meetings would benefit from more clarity of purpose and others can be eliminated altogether.

Types of Meeting Activities

Once you know the purpose of a meeting and its agenda, you can identify the types of activity the meeting involves. In the best meetings, everyone understands the activity they're engaged in – and why. Every meeting involves one or more of the following activities:

1. Information sharing	Exchange information.
2. Problem solving	Make decisions about how to solve a specific problem.
3. Brainstorming	Define objectives, generate ideas and decide next steps.
4. Performance review	Review individual and group performance. Decide areas of strength and areas of improvement.
5. Strategic planning	Wrestle with large issues cutting to the heart of the organization's future. Decide goals, objectives, strategies, action steps, timetables, and responsibilities.

If a meeting is purely for information sharing, the meeting leader should ask himself or herself whether the meeting is really necessary. There may be other reasons to hold the meeting – such as building teamwork or expanding capacity. But if the meeting leader asks the question, s/he might find that the information could be distributed via email, for example.

Many meetings lose their effectiveness because people try to cram too many activities into one single meeting. For example, a meeting to discuss a new initiative might drift into a brainstorming meeting about the need for a new database. But the people and information needed for the database discussion aren't present at the meeting, so time is wasted.

Bottom line: The more targeted the meeting, the better it will be. The meeting leader should limit the meeting to its stated purpose. Call a separate meeting when a new need arises.

Key Meeting Roles

Two people have key roles in creating a successful meeting: the leader and the coordinator. Sometimes the same person holds both roles.

Meeting leaders run the actual meeting. They develop and manage the agenda, decide what information is needed in advance, facilitate the meeting, gain agreement on decisions, and define action steps. Meeting coordinators manage the logistics of the meeting—including sending the meeting invite, securing appropriate meeting space and equipment, taking meeting notes and disseminating them.

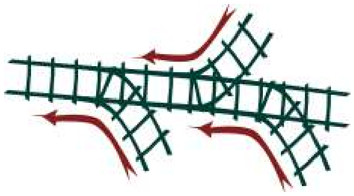
The leader's role is to:

- Decide and communicate the purpose of the meeting.
- Develop the agenda.
- Define what advance information is needed.
- Convene the meeting on time.
- Ensure everyone is clear on the agenda and decision items.
- Ensure equal talk time.
- Invite dissenting points of view.
- Push the group toward action.
- Ensure the group decides how to share information from the meeting.
- Adjourn the meeting on time.

The coordinator's role is to:

- Arrange for the room.
- Supply the room (as needed) with conference phone, laptop and projector, dry erase markers.
- Distribute the agenda and handouts.
- Monitor the clock (or have another person serve in this role).
- Take notes.
- Distribute the notes promptly.

The leader also may need to appoint a "pot stirrer" for the meeting – someone to provide a dissenting point of view. Not all meetings need a pot stirrer. But when major issues or problems are on the agenda, the team will benefit from listening to two or more opposing points of view.



Note: The leader should rotate the role of pot-stirrer from meeting to meeting so that everyone perceives that it's a role, not the personality of the person playing the part. Moreover, rotating the job can be a way to keep meetings lively and fun.

Here are some tips for coordinators in creating effective meeting notes:

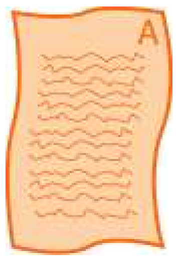
- Use the agenda as the template for the notes.
- Indicate in the notes who attended.
- Keep the meeting notes fairly brief by capturing the key discussion points, decisions and their rationale, and action steps. Action steps should include the task, the person who will complete the task, and a deadline for completion.
- In addition to disseminating the notes, establish a location on a shared drive where everyone knows where to find the archive of meeting notes.

If the coordinator role is rotated, be sure to communicate to the new coordinator the expectations related to note-taking, as well as his/her other responsibilities.

Agendas

The meeting leader has the responsibility for maximizing the value of meeting time. A key element is an agenda, prepared and distributed before the meeting starts. Agendas force the meeting leader to consider how to best use the meeting time.

Agenda Format A:



- Welcome, purpose of meeting (Charles); 5 minutes
- Strategic performance review (Bob); 30 minutes
- Trends affecting strategic plan (Julie, Bob); 15 minutes
- Discuss potential changes to plan (Bob); 30 minutes
- Determine action steps and communication of results, (Charles); 15 minutes
- Evaluate meeting (Charles); 10 minutes

Every agenda should set aside time at the end for people to discuss communication. First, to consider how to communicate the results of the meeting to the rest of the organization – and second, to evaluate the quality of the meeting.

Talking about how to communicate what happened in the meeting is a crucial step because value is only created by increasing capacity, raising awareness, or making changes in actual process or services. Consider not only what needs to be communicated, but to whom—which internal stakeholders need to be informed? Are there individuals or groups outside of the organization that need to know? Also be sure to include in the meeting's action steps who will be the one to communicate, and how and when s/he will complete this task.

Evaluating the quality of the meeting is often over-looked, but it is the best way to provide immediate feedback to the meeting leader and help him or her maximize its value to the organization. By inviting feedback, the meeting leader also builds trust within the group by showing that s/he is aware of his or her role in managing people's time effectively.

Decision Items

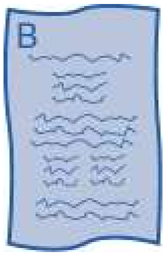
We like to encourage meeting leaders to go one step beyond this agenda format and also list the decisions they expect will come out of the meeting. By focusing on decisions, the meeting leader can get a good grasp of how much value he or she expects the meeting to generate. It also forces the meeting leader to consider what advance materials are needed – and who else may need to participate.

Ultimately, it may force the meeting leader to realize that s/he is not prepared to bring a particular agenda item forward until s/he collects additional information or clarifies his or her decision-making role (see pages 5 and 6 for additional discussion about decision-making roles).

This format shows an agenda with decision items included:

Agenda Format B:

- Welcome and progress review (Sylvia); 5 minutes
- Team leader's report (Bob); 5 minutes
- Database report (Julie); 30 minutes
- Action items:
  - Decide final list of vendor qualifications.
  - Decide staff responsibility for database backup.
  - Decide final field configuration.
- Systems vendor update (Ellen); 20 minutes
- Action items:
  - Decide timeline benchmarks
  - Decide quality benchmarks
- Determine action steps and communication of results (Sylvia); 10 minutes
- Evaluate meeting (Sylvia); 10 minutes



Group Decision Making

To add value, groups need to make decisions. Group decision-making is a complex art. But it can be made vastly simpler if two rules of thumb are followed:

- Make sure the decision-making role of each person in the room is clear, especially the leader.
- Make sure the decision-making role of the group is clear.

It is the job of the leader to define the role of the group – and of key individuals within the group. There are five different types of decisions – and only five. Knowing when and how to employ each type is an important aspect of effective leadership.

Autocratic	You make the decision by yourself using the information you have available.
Consultative	You involve others, either individually or in a group, by sharing the issues and obtaining their ideas, suggestions or recommendations, then you decide.
Consensus	You involve others, either individually or in a group, by sharing the issues, then you generate and evaluate alternatives and agree on a decision. The standard of consensus is that everyone agrees with the decision or agrees to support the decision, despite reservations.
Delegated	You determine that another individual or group has the data and judgment to make the decision, so you delegate it and accept/support the decision that they make (unless there is a significant change in circumstance).
Democratic	You use a voting system to make the decision, making sure that the rules are well-understood by everyone.

Typically, the decision-making role of the group – and of individuals within the group – will shift from topic to topic. As needed, the leader needs to clarify the role of the group and the role of key individuals.

For example, the leader might say: “For this item, this is a decision that has been delegated to me by my boss. Before I make the decision, I want to consult with this group and understand your different points of view. If there’s a clear consensus, that’s great. Otherwise, I will make the final decision.”

Note: If you are the leader and don’t know your decision-making role with regard to a particular issue or agenda item, avoid wasting meeting time on that issue until you get a clear understanding of your role.

If a decision is a *consensus* decision, then the leader needs to be sure everyone understands what that means. First, consensus means that every viewpoint has been heard and understood during the process. Ample time needs to be given to the collection of information and debate of alternatives. Second, there are two different standards of consensus. One standard is 100% agreement. A second standard is that the vast majority of people in the group agree and the others agree to put aside their concerns and support the decision. If people are wavering or feel peer pressure to conform, that’s not consensus.

Ground Rules

All groups benefit from ground rules. These are rules that people in the group have agreed will help them communicate effectively.

We recommend that every group that meets regularly have ground rules. Why? Because every group needs to delve into sensitive territory, where people will often disagree, and where emotions are often intense. Ground rules assure that everyone’s point of view will be heard and that disagreements get handled fairly.

The more sensitive the meeting, the more important the need for ground rules. But that doesn’t mean that other types of meetings won’t benefit. As you review the list of ground rules below, imagine the meetings you attend and which ground rules you’d like to see in force there.

Here are some potential ground rules. As you review them, put a check mark by the ones that you think would add the most value for your meetings.

- **Keep discussions focused.** Discussions have a way of quickly spinning out of control. Stick to the agenda. Verbalize to each other the need to use the time effectively.
- **Ensure equal talk time.** This means managing one’s own air time by speaking succinctly and not repeating oneself and encouraging others to participate who have been quiet.
- **Allow for process checks.** Empower people to ask whether their time is being used well. For example, a member of the group might say: “Process check – do we really need to discuss this any further?”

- **Permit one speaker at a time.** It's plain courtesy to focus your attention on the speaker. If two people are having their own side discussion, it's a sign of disrespect. If it's important, raise the issue with the meeting leader.
- **Agree on the meaning of key words.** Words are limited in their ability to capture precise meanings. Be aware of jargon, acronyms, or terms that carry multiple meanings. Define terms and whenever possible, keep an updated glossary for everyone to use.
- **Bring issues to the table (avoid "back room" discussions).** Heed it as a warning sign if issues are being raised in the hallways that don't get brought up before the group. Participants should listen carefully to their own hallway conversations and raise any points that are germane to the work being done.
- **Explain the reasoning leading to your conclusions.** Give people the data that will help them understand your position. If your reasoning is sound, it will support the position you advocate. If data is missing, you will help the group understand what it needs to find out. Either way, the group wins, and you win.
- **Inquire into the reasoning of others.** In parallel with the rule above, pay full attention to the reasoning of others. What data can they cite to support their position? Where are the gaps in logic?
- **Invite inquiry into your views.** Along with offering your reasoning, you should also actively invite people to probe your point of view. Say things like: "I'm curious what I might be missing."
- **Identify missing data.** This ground rule reminds us of the importance of finding the missing data that might shed light on our assumptions. It adds the formal step of keeping a log of all the things the group doesn't know – and needs to know – in order to reach a fruitful conclusion.
- **Make "undiscussable" ideas discussable.** During the meeting, people should check on each other's thoughts. Ask each other: "Do you have any undiscussables?" Express these conflicts in the form of "I feel…", not as an attack on someone else.
- **Tackle issues, not people.** When challenging another's position, always state the issue or the behavior that is the subject of your concern. Then state the consequences for the organization if the issue or behavior is not addressed. Guard against portraying yourself as the only person in the room who sees things clearly.
- **Communicate results.** Spend time deciding what the group needs to communicate to the rest of the organization. In that way, the meeting becomes linked to the communication pipeline.
- **Put away distractions.** Respect the other meeting participants by keeping the communication centered in the room. At the start of the meeting, ask everyone to put away their cell phones. If you feel it's okay to text or check email on your phone, then why are you there?
- **Be sensitive about sensitive information.** When conflicts are getting worked out, it's best to keep that portion of the meeting to yourselves. Agree on what you want to communicate to the rest of the organization, and abide by that agreement. Ensure meeting notes focus on the resolution or decision and not any conflict or sensitive information.

Once established, you should disseminate the ground rules, post them visibly at meetings, and review them often. They reflect your group's operating principles and your respect for each other. They are part of your culture and something to be proud of.

Once you agree on the ground rules, then monitoring the ground rules is everyone's responsibility. The leader should continually remind the group of each person's responsibility first to monitor their own behavior, and then to monitor others.

Every participant, not just the leader, should check out loud when a ground rule is breached. Just say "ground rule" when you think a rule is being breached. If the problem doesn't rectify itself right away, you can clarify. If someone contests, then the meeting leader should intervene, make a judgment, and allow the meeting to move on.

Note: The leader plays a key role in setting an example. S/He must set the tone by actively monitoring his or her own compliance with the ground rules.

Impromptu Meetings

What about impromptu meetings? Often people will meet on the spur of the moment to discuss a proposal, talk through a new idea, or trade thoughts about a problem. While this may seem harmless, our experience is that impromptu meetings can have unanticipated, negative consequences: Key people will feel left out, decisions can be rushed, and follow-up communication may not be adequate.

Our recommendation is to follow this rule: If it's important enough that three people need to meet about it, then it's important enough to make sure you maximize the meeting's effectiveness. Call off the impromptu meeting and plan a scheduled meeting.

Using the G.R.O.W. Model to Facilitate Effective Conversations

Teaching people the G.R.O.W.[1] model helps them feel more confident and comfortable in managing effective conversations. Using this model, people can tackle complex issues more effectively because the discussion is organized in a way that everyone understands.

The G.R.O.W. model assumes that a logical sequence to a discussion is better than having people speak randomly. Here's how it works:

Goal
The "G" in G.R.O.W. stands for "goal." The first thing in any important conversation is to establish the goal of the discussion – and its connection to a larger goal for the organization. For example, let's assume the initial goal is defined as: "How to fix our web site." As you talk about the goal, it becomes clear that the real goal is to deal with all potential competitors who might try to copy your services using information from your web site. Talking first about the goal ensures people are oriented toward the real goal.
Reality
The "R" stands for "reality." The second thing people need to talk about is the current reality. What's going on? How did we get here? What do we know? What don't we know? Using the example, the reality may be that the web site was developed without sufficient attention to how easily competitors could copy sensitive information.

[1] The G.R.O.W. model was introduced by John Whitmore in his book "Coaching for Performance." Boston: Nicholas Brealey, 1996.

Options

The "O" stands for "options." This is the part that people typically jump to before they talk about the goal and the reality. What should we do? Hire a contractor? Change our management approach? Scrap the existing platform? Here's where people need to engage in creative brainstorming and share their ideas.

Will

Finally, the "W" in G.R.O.W. stands for "will" – as in what will we do? This is the time to decide on the next step. It can be the toughest part of the discussion, since people need to commit to action. If the decision is being made consultatively, one person can decide. If by consensus, it can take several rounds of asking each person what they would like to do. But ultimately, people are likely to come to agreement, at least on the next steps.

STEP	QUESTIONS TO ASK
Goal	**What is the idea, topic or issue we want to tackle?** ▪ What are we here to talk about and why? ▪ What are our long-range goals related to this issue? ▪ What are our goals for this meeting or discussion?
Reality	**What is the context, the current reality in more detail?** ▪ How does this idea, topic, or issue relate to our long-range goals? ▪ What do we currently know? ▪ What data do we have? ▪ What is currently being done? What strategies have been tried? ▪ What are our concerns about this issue? ▪ What is really the issue here, the nub of the issue or the bottom line?
Options	**What are the different ways we could approach this?** ▪ What are our ideas to address this issue? ▪ What could be done if we had more time or a larger budget, or if we were in charge? ▪ What alternatives are worth seriously exploring? ▪ What are the advantages and disadvantages of each of these? ▪ Which do you think would give the best result? ▪ Which of these solutions appeals to you most, or feels best?
Will	**Which option or options should we pursue?** ▪ What next steps would we like to take? ▪ What additional information would we like to get? ▪ Who needs to do what? What is the desired timeline? ▪ What support do we need and from whom? ▪ What do we need to do to obtain that support and when? ▪ What problems might we encounter? ▪ What could we do to mitigate these factors? ▪ Who needs to know what our plans are?

Recap: The Habits of Highly Effective Meeting Leaders

Effective meeting leaders—or facilitators—organize the conversations that other people have. Their role is to guide the conversation by defining the desired outcomes, deciding the sequence of topics, ensuring that everyone's voice is heard, asking relevant questions, limiting non-productive communication, and summarizing the conclusions reached.

Highly effective facilitators focus on doing the following 15 things regularly. They:

1. Communicate the meeting purpose (or goal) and how this fits within a broader organizational goal or process
2. Define the agenda (ideally in advance of the meeting)
3. Establish ground rules
4. Deal with ground rule violations fairly
5. Clarify decision-making roles and responsibilities
6. Ensure that everyone's voice is heard
7. Keep their own voice and personality in check
8. Probe for clarity; make sure everyone understands what's being said
9. Document the key points and agreements so they are visible to the group
10. Test and validate consensus as needed
11. Help people put their conflicts on the table and address them productively
12. Document action steps, responsibilities, and timing
13. Summarize key decisions at the end of the meeting
14. Clarify what communication needs to happen after the meeting
15. Ask people to evaluate the quality of the meeting