

SUCCESSFUL MEETING MANAGEMENT

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. deciding on a new service or product);
- By improving capacity (e.g. improving coordination between departments, clarifying roles and responsibilities);
- By building internal intelligence (e.g. learning what customers think about your products);
- By building teamwork and trust (e.g. building confidence that team members can rely upon one another);
- By resolving issues (e.g. addressing opportunities, challenges).

Meeting Purpose

Once you have decided that a meeting adds value, then you should be able to define its purpose. Its purpose statement should be written down and communicated to everyone involved prior to the meeting.

Consider the following statements of purpose:

- To evaluate our performance in meeting our customer service goals.
- To review quarterly financial performance.
- To review market trends and their impact on sales and marketing.
- To get progress reports on new products and to prioritize new product initiatives.

Ask yourself: Which of these meetings do you think would add the most value to the organization? The least?

Types of Meeting Activities

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. |

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.

If a meeting is purely for information sharing, the meeting leader should ask himself 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, 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 marketing opportunity 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 manage the agenda, decide what information is needed in advance, gain agreement on decisions, and define action steps.

The leader's role is to:

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

The coordinator's role is to:

- Arrange for the room.
- Distribute the agenda.
- Monitor the clock.
- Keep the minutes.
- Ensure that minutes are distributed 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, to be the devil's advocate. Moreover, rotating the job can be a way to keep meetings lively and fun.

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.

Sample Agenda:

- Welcome, purpose of meeting (Charles); 5 minutes
- Strategic performance review (Bob); 45 minutes
- Trends affecting strategic plan (Julie, Bob); 45 minutes
- Discussion of potential changes to plan (Bob); 30 minutes
- Break (10 minutes)
- Budget review (Julie); 15 minutes
- Trends affecting budget (Julie, Roseanne); 30 minutes
- Discussion of potential budget changes (Julie); 30 minutes
- Communication of results, action steps (Charles); 15 minutes
- Evaluation of 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 products or services. Consider not only what needs to be communicated to internal stakeholders, but to external stakeholders as well, such as customers, vendors, consultants, and shareholders.

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 he is aware of his 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 he is not prepared to bring a particular agenda item forward until he collects additional information or clarifies his decision-making role (see page 6 for additional discussion about decision-making roles). This format shows an agenda with decision items included:

Sample Agenda:

- Welcome and progress review (Sylvia); 5 minutes
- Team leader's report (Bob); 5 minutes
- Database report (Julie); 30 minutes
- Action items:
 - Decide on UniDisc as vendor.
 - Decide staff responsibility for database backup.
 - Decide final field configuration.
- Systems vendor update (Ellen); 20 minutes
- Action items:
 - Decide financial benchmarks
 - Decide quality benchmarks
- Communication of results, action steps (all); 10 minutes
- Meeting evaluation 10 minutes

The Meeting Checklist

A useful tool for designing effective meetings is a checklist to guide the meeting leader in planning the meeting. Here is an example:

| Item | Example |
|-------------------------------|--|
| Meeting purpose: | Monthly progress report on our strategic plan |
| Meeting leader: | COO |
| Coordinator: | Executive assistant |
| Agenda items: | Review performance to plan; review factors that necessitate changes to plan; review budget impacts |
| Decision items: | <ul style="list-style-type: none"> ▪ Adjustments to priorities ▪ Adjustments to strategic plan ▪ Adjustments to budget ▪ Agree on next steps |
| Activities: | Information sharing, brainstorming, problem-solving |
| Decision-making roles: | Consultative in each case |
| Protocols: | Agenda; materials distributed in advance, minutes to all senior vice presidents |
| Ground rules: | In place |

Note: If you want more information, look in our Leadership ToolBox under training materials. There you will find our extended workbook: "Managing Effective Meetings." You'll also find two additional tools in the Leadership ToolBox that are extremely useful in managing meetings effectively:

- "Five Types of Decisions"
- "Ground Rules for Productive Conversations"