



How to Manage Meetings; Increasing productivity and efficiency



May 2013

Preface

When meetings go bad

- How many of you have ever sat in a meeting and thought to yourself...
 - Why me?
 - Why are we wasting this time?
 - What are we accomplishing?

If so, this outline will show you how not to have those things happen.

- Understand the cost of ineffective meetings:
 - Low morale
 - Low productivity
 - Expensive! (Count the number of people in a meeting, multiply it by the national average hourly income for professional staff (with benefits) = \$35/hr * length of meeting. Example (a 2 hour meeting * 20 people * \$35 = \$1,400)
- Major problem with most meetings?
 1. Getting off subject
 2. Rambling, redundant, or digressive talk
 3. Inconclusive
 4. No results, decisions, assignments, or follow-up
 5. No goals, purpose, or agenda
 6. Meetings too long
 7. Ineffective leadership
 8. Disorganized, little control
 9. Starts late, tardiness
 10. Time wasted during meeting
 11. Poor or inadequate preparation by all
 12. Information overload
 13. Unfocused, irrelevant information
 14. Individuals monopolize discussion
 15. Interruptions from within and without

Main Outline

- How to avoid those problems? Here is a high-level outline:
 - Preparing for a meeting
 - Meeting types
 - Role of the Chair

- During the meeting
 - Role of the Facilitator
 - Dealing with specific problems
- Closing the meeting
 - Creating an action plan
- Looking at those items in more detail:
 - Preparing for a meeting – Ask the following:
 - Is this meeting needed?

Don't hold regularly scheduled meetings just because they're regularly scheduled. If there is nothing on the agenda except discussion items, consider postponing the meeting.
 - Who should attend? (Don't invite people who are not needed)

People being invited to attend should:

 - a) have a substantial contribution to make to the decisions being made, and
 - b) represent their department (its their job to communicate the decisions to the department once the meeting is over).
 - Don't make important decisions that affect another department without someone from that department present!
 - Distribute agenda/materials ahead-of-time so people can come prepared to discuss (not review!)
 - Understand when **NOT** to hold a meeting:
 - There is inadequate data or poor preparation
 - Something could be communicated more effectively by telephone, e- or snail-mail, or a one-on-one discussion
 - The subject matter is so sensitive that it would compromise its integrity if it were shared with all participants
 - Your mind is made up and you've already made your decision
 - When the subject would be considered trivial by many of the participants

- Once you decide to hold a meeting:
 - Decide what **type** of meeting you need to hold:
 - Consulting (manager presents and will ultimately make decision)
 - Deciding (group has been delegated a task)
 - Recommending (group will communicate recommendation to manager(s) not present)
 - Recognizing people/achievements
 - Training
 - Decide **who** will facilitate
 - Chair vs. Facilitator
 - (Note: We'll talk more about the role of the facilitator later, but for right now just note that the facilitator is concerned with meeting **process**. The facilitator is not in charge of making the decisions—and is not necessarily the manager in charge.)
 - Facilitating is hard work and will consume all your attention
 - If you have strong feelings on an agenda item, it may be wise to ask someone else to facilitate
 - The person who **chairs** the meeting needs to do the following:
 - Prepare the agenda
 - Time of meeting
 - Meeting room
 - Assigned roles (Facilitator, Timekeeper, etc.)
 - List of agenda items
 - Topic
 - Starting time and length
 - Desired outcome (information, decision, discussion, recommendation).
 - Include materials to discuss
 - Distribute at least two days in advance
 - Starting the meeting
 - Know the things that should be done every time
 - Know the things that should be done as needed, (either the first time you meet or when new participants are present).
 - Starting the meeting – Do every time
 - Chair's Orientation Speech
 - State goals for the meeting

- Clarify the scope of the meeting
 - Define the scope of the problem or issues to be discussed
 - When problem-solving, suggest the characteristics of a good solution
 - How will the solutions be judged?
 - Select or introduce the Facilitator, Timekeeper, Recorder, and other roles for this meeting
 - Review the previous action plan
 - Follow up on action items not completed since last meeting
 - Distribute the action plan from the meeting to all attendees
 - Should identify action to be taken, by who, by what date
- Starting the meeting – Do as needed
 - Introduce new members
 - Establish ground rules
 - Decide how we are going to make decisions
 - Consensus (takes time)
 - Voting (may not produce good buy-in)
 - Outline what is considered appropriate behavior
- Building consensus
 - Summarize the work up to now
 - Identify points of agreement
 - Identify points of disagreement
 - Listen to each point of view
 - Stick to the ground rules!
 - Determine underlying assumptions
 - Obtain additional data
 - Use special techniques
- What are the ground rules?
 - We will...
 - Distribute an agenda two days in advance
 - **No agenda, no meeting**
 - If it's not on the agenda, we don't talk about it (until next time)
 - Begin on time
 - Persons who arrive late or are unprepared to discuss an issue should expect any scheduled decisions to be made without their input
 - Stick to the schedule.
 - Stay on topic.
 - Be courteous.
 - Speak one at a time.

- Make no personal comments.
 - Listen to all ideas respectfully.
- Appoint/Designate the following
 - Facilitator
 - Recorder
 - Timekeeper
 - Devil's Advocate
 - Vibes-watcher
- Role of the Facilitator
 - Encourage participation
 - Demonstrate good listening skills
 - Solicit alternatives
 - Monitor the emotional environment
 - Generate enthusiasm
 - Summarize
- Role of Recorder
 - The Recorder keeps a record of what goes on in the meeting
 - Keep minutes
 - Creates and distributes the action plan
 - During the meeting, the Recorder may also be asked to
 - Review, when asked, decisions made and items completed during the meeting
 - Summarize key points discussed
- Timekeeper
 - If you're having trouble keeping your meetings on schedule
- Devil's Advocate
 - Good decisions are rarely made without considering the alternatives; if everyone starts out in agreement, then appoint a Devil's Advocate to raise some questions or point out alternatives
- Vibes-watcher
- Dealing with problems
 - Staying on schedule
 - Staying on topic
 - Interruptions and other discourtesies

- Managing conflict
- Dealing with emotions
- Encouraging participation
- Idea generation techniques
- Staying on schedule
 - Include the timing in the agenda so that people can prepare appropriate length remarks or information
 - Appoint a timekeeper!
 - Appoint a Recorder
 - Ask the Recorder how we're doing on the agenda
 - Intervening is OK!
 - When people go on too long
 - "Michael, I'm not sure I understand how your story relates to the decision we're making today. Can you explain?"
 - "James, you've talked for three minutes now. I'd like to hear what Sally thinks now."
 - Interruptions and Other Discourtesies
 - Avoid verbal interruptions, personal comments, and sarcasm
 - Make courtesy a part of your guidelines
 - Cost
 - Key ideas may be lost
 - Input from shy persons may be discouraged
 - Remind the offender of the guidelines
 - Suggest additional guidelines as needed
 - Managing conflict
 - Conflict is OK!
 - Avoid polarization
 - Clarify goals
 - Ask for more information
 - Focus on ideas, not people
 - Handle some issues one-on-one
 - Remove any "elephants in the room"

- Dealing with emotions
 - Acknowledge peoples' feelings
 - “Tim, you're frowning and you've got your arms crossed, is there something going on that we need to talk about for a moment, before we move on?”
 - “Sally, I see that you're upset. Do you want to talk about that for a moment before we get back to the topic at hand?”
 - Bear in mind that emotions need not lead to inappropriate behavior
- Getting everyone involved
 - Avoid Groupthink
 - Reinforce shy speakers
 - “I see...”, “Go on..”, “Yes...”, etc.
 - Ask for alternate views
 - “Does anyone disagree with this?”
 - Picking someone who has not spoken
 - “James, what do you think?”
- Solution jumping
 - Sometimes it's really easy to jump into a discussion of a proposed solution without ever stopping to analyze the problem
 - Often leads to bad decisions or inappropriate solutions
 - This happens a lot in software design because customers often suggest solutions without defining the problem
- How to generate ideas in a meeting
 - Brainstorming
 - Affinity process
- Brainstorming
 - Guidelines
 - Criticism of ideas isn't allowed
 - All ideas, no matter how wild, are encouraged
 - The more ideas, the better
 - Every participant should try to build on or combine the ideas of others
 - Avoid killer phrases
 - “You're too young.”
 - “If it ain't broke...”
 - “We've always done it this way.”
 - “I'll get back to you.”

- "It'll NEVER Work."
 - "No!"
 - "Great idea, but not for us."
 - "Do you realize the paper work it will create."
 - "It isn't your responsibility."
 - "We tried that before."
- Creating affinity
 - Put ideas on cards
 - Silently move the cards into related groups
 - Create duplicate cards if needed
 - Discuss
 - Sort ungrouped cards via discussion
 - Consolidate duplicates
 - Identify a theme for each group
 - Create header cards
- Closing the meeting
 - Summarize meeting
 - What did we accomplish?
 - What did we decide?
 - Create action plan
 - Who is going to do what?
 - When are they going to do it?
 - Select roles for next meeting
 - Evaluating the meeting
 - How could we do this better?

Resources

1. Drew Howick, et al. *The New Compleat Facilitator: A Handbook for Facilitators*.
2. Roger K. Mosvick and Robert B. Nelson. *We've Got to Start Meeting Like This: A Guide to Successful Meeting Management*.
3. <http://www.3m.com/meetingnetwork/index.html>