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Do You Really Need a Meeting?

There are many reasons why meetings can be frustrating to leaders and participants:
- Not efficient
- Not effective
- Wrong people present – or absent
- Problem behaviors
- Lack of commitment

Ask yourself if you can accomplish your goals *without* having a meeting. If you are going to have a meeting, this tool can guide you through some key considerations to help increase the likelihood your meeting will be efficient and effective.

Guiding Principles for Meetings
- Maximize what you can do outside the actual meeting.
- Minimize meeting time, topics and attendees.
- Answer: Why, What, How, Who, When, Where (see checklist below)
- Continually keep "Why a meeting?" in front of you at all times: can you address the need and accomplish your goals in another way?
- Continually seek ways to save time and maximize efficiency and effectiveness:
  - Advance information gathering
  - Drafts for reactions

Meeting Leadership

Being an effective meeting leader means –
- Plan for an efficient, effective meeting
- Start on-time (reward the timely), manage the time well & end on time
- Set the tone and model ideal behavior (norms and participant list)
- Elicit and facilitate participation
- Move/guide the discussion
- Interpret & ensure understanding
- Make assignments
- Summarize resolutions, action steps and outcomes
- Bring meeting to closure
- Conduct follow-up and facilitate follow-through
- Report on progress and outcomes

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Meeting Considerations

"W"s	Question	Tips
Why	Why a meeting?	Strive for better ways to address needs and accomplish goals
What	What is the need?	See Key Words: Reasons for Meetings
	What is the goal?	See Key Words: Reasons for Meetings
	What topics? ▪ Review last topics ▪ Review parking lot	Consider circulating a data collection sheet for needs, topics, issues, ideas and suggestions
	What is the ideal length of time?	Minimize ▪ Can you keep it to 50 minutes? ▪ Can a topic be dealt with outside the meeting ▪ What can be done to minimize the time needed for each topic? ▪ Create a "budget" for time-by-topic (Delfini Agenda Builder Tool) ▪ Longer may be advisable if hard to get people together (provided time is being used wisely) or for moving through large projects
	What is the idea order for the topics?	Strategies ▪ First consider sequencing needs ▪ Most important first to ensure completion? ▪ Most easy to dispense with first to gain accomplishment? ▪ Information items – try to keep to writing ▪ Write 1 sentence description for each topic to create focus and provide direction
	What roles are needed?	See Roles List below
	What skills are needed?	
	What background information is needed?	
	What has to happen ahead of time?	
	What assignments need to be made in advance?	Will assigning advance work to attendees be helpful or a hindrance? ▪ Be sensitive to their time issues ▪ May increase participation and buy-in ▪ Can be simple such as think up one idea to share on each

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"W"s	Question	Tips
		topic
	What meeting aids are needed?	
	What equipment and other resources are needed?	
	What is needed for people's comfort?	
	What reminders need to be posted in the meeting room?	Suggestions ■ Meeting Norms ■ Parking Lot
	What should be brought to the meeting?	Suggestions ■ Information Items ■ Agendas ■ Evaluations
How	How will the meeting be conducted? This is your Master Plan ■ Processes: Series of actions ■ Methods: How you will do the actions	Questions that follow will help create the plan.
	How will the meeting be led or facilitated (and which)?	Document in the agenda
	How will norms and meeting etiquette be determined?	Prepare suggestions in advance for reaction or if already in place, do people need to be reminded?
	How will input be gathered?	Document in the agenda
	How will decisions be made?	Document in the agenda
	How will next steps be determined?	Strive to have a next step determine for every meeting outcome
	How will assignments be made?	
	How will outcomes be captured?	
	How will we know the meeting was effective?	
	How can we apply learnings from the past to improve this meeting?	Use the past meeting evaluations
Who	Who must be there?	Is there anyone whose absence will ruin the meeting. Ensure they are there, no matter what.

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"W"s	Question	Tips
	Who else should be there?	Minimize ▪ Try and establish a culture where people feel comfortable not being included in a meeting ▪ General rule of thumb to limit working groups to under 8-10.
	Who should be available (on-call)?	
	Who do you need to prepare or consult with in advance?	
When	When will the meeting be?	
	When will the agenda and background materials go out?	Rule of thumb: 1-2 weeks
	When will minutes be circulated?	Strive for same day
	When will meeting evaluations be due?	Strive for same day
	When will follow-up occur?	Strive for 2-3 days following release of minutes
	When will reporting of progress and outcomes occur?	Strive for progress reporting at time of next agenda preparation
Where	Where will the meeting be held?	

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The Meeting Process

Meeting Processes for Success
Before, During & After Planning

Before
Needs & Goals
Developing the Plan (Content, Processes & Methods)
Roles and Skills
Meeting Tools
Logistics

During
Norms
Roles
Utilizing Plan & Tools
Effective Management (Time, people, outcomes & future)

After
Evaluation
Documentation
Dissemination
Follow-through
Reporting

"Meeting process" refers to all the work required for a successful meeting that is done before, during and after the meeting

Pearls

- Envision the entire meeting process to conceive your plan
- Document your vision into a template to serve as your –
  - Meeting process task sheet
  - Agenda
  - Documentation of meeting proceedings
  - Outcome plan and action plan for next steps

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Before

SLOW before you GO!

- Decide upon Needs & Goals
- Developing the Plan
  - Content
  - Processes & Methods (see tips below)
- Roles & Skills (see checklist below)
- Meeting Tools (can help with the Content)
- Logistics

Content
Pearl: If you need to gather topic ideas from others, create your own "agenda capture template" which can be used to manage work outside of a meeting and to create your meeting content.
Can include –
- Topics from last meeting
  - Action steps, outcomes, parking lot
- Needs and ideas from others
  - Topic, issue, ranking of import and raised by whom

Processes & Methods
- Processes are action steps
  - Example: Decision processes
- Methods are how you do your actions – for example how will you make decisions? Examples…
  - Voting (unanimous, majority), Nominal Group Technique, Consensus

Pearl: Envision the meeting to envision the various action steps, and ensure you've thought about a method for each of the actions (see Meeting Actions below).

What do you want to Happen in the Meeting: Meeting Actions

Leadership Needs	Informational Reasons	Work Process Reasons	Social Reasons
- Oversee - Motivate - Assign - Bond - Accept - Agree - React - Focus - Advice	- Inform - Educate - Clarify - Share	- Plan - Study - Create - Think - Solve - Coordinate - Decide	- Affiliation - Expression - Importance - Play

Roles List: Considerations

Meeting Management Roles	Roles of Attendees

- Leader or Facilitator
- Decision-maker about meeting processes
    ○ May be leader or facilitator
    ○ May be group
    ○ May be ranking leader
	- Leaders
	- Authorities
	- Decision-makers
	- Opinion leaders
	- Stakeholders

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▪ Recorder ▪ Time-keeper ▪ Evaluators	▪ Experts ▪ Skilled/Know-how ▪ Advisors ▪ Educators ▪ Worker/Doers ▪ Problem-solvers ▪ Observers ▪ Outsiders

Meeting Tools

Agenda Capture Template
(See **Content** above)

Agenda Builder
▪ Delfini Excel Spreadsheet allowing you to enter minutes needed per topic to construct a timed agenda

Meeting Process Tool
▪ Construct a tool to use to manage your entire meeting process (before during and after). This tool gets distributed to all meeting participants in advance of the meeting (and have copies available at the meeting).

Tool Purpose	Tip	Example
Agenda	Do more than an "agenda." Do a true description of what is being planned. Items: topics, focus, direction, timing, responsible party Adding these elements to your agenda can help make the meeting more efficient and more effective.	10 AM – 11 AM Meeting Management - Item for Decision - We wish to examine all standing meetings to determine if they are necessary or not. - Sheri will review the goal and purpose of each meeting. - Group will decide if meeting will continue and if yes, frequency for meeting.
Information Agent	This tool can be a time saver and communicator for you. Items can be included on the agenda for information only without having to discuss in meeting.	Information Items – No Discussion ▪ IRS has increase mileage reimbursement for personal cars to 34 cents per mile.
Expectation Setter	You can help set the tone of the meeting in this document.	Reminder: We agreed we would fine each late attendee 25 cents for each minute they are late.

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Meeting Manager	This is your "efficiency and effectiveness" tool during the meeting.	"Because we have a very full agenda, we will have to limit discussion at this point. We can put that in the parking lot for future consideration."
Meeting Documentation	Use this tool to just in time record outcomes and action steps. Tip! Do as much as you can in advance of the meeting	What – Who – When: Mike will draft an evidence-tag statement by next Tuesday.

When
- Tip for easier scheduling for multiple people – pass around list
- of times and dates for people to cross out when not available

Where
- Location
- Room set-up for functionality and comfort
  (seating, space to work, lighting, warmth, creature comforts)
- Equipment needed at the location – examples –
  - LCD projector
  - Screen
  - Computer stand
  - Overheads
  - Speaker phone
  - Microphones
  - Power cords
  - Extension cords
  - Tables/chairs/configuration
- Bring extra copies to the meeting of norms, agenda and anything else you'll be sorry someone forgets and, as useful, handouts

Planning Pearls
1. Get the agenda (meeting process document) right!
2. Have all documents/materials organized to work with agenda
3. Leader does a walk-through of meeting with agenda and materials
4. Leader does walk-through with staff/others and discusses problematic areas
5. Envision the entire meeting and what you want to have happen
6. Chart the potential course by pre-documenting action steps, assignments, etc. (Pearl: Prepare "minutes" as you can ahead of time…)
7. If assigning pre-work, reminders and check-in with people (establish own tickler)

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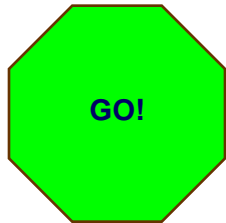**Date:**

During

GO!

- Norms
- Roles
- Utilizing Plan & Tools
- Effective Management
  o Time
  o People
- Outcomes & Future

Ideas for Meeting Norms
- We will start on time, and we will end on time
- All meeting participants agree to come prepared
- Meeting attendees will communicate constructively and respectfully
- Each meeting attendee takes personal responsibility to help the meeting be efficient and effective
- Each attendee agrees to strive to take a problem-solving approach, be objective and focus on the good of the mission
- Each attendee agrees it is not okay to complain about outcomes when he or she has not participated responsibly (i.e., within norms)
- Everyone will follow up on their assigned tasks within 2 weeks, unless otherwise arranged with management

Roles
May need to remind people of their roles and expectations at the start of the meeting. (See above Roles List for considerations.)

Be sure to inform participants –
- What are the goals
- Remind re: the norms
- What latitude do they have
- What are the consequences of their decisions
- Ensure understanding for how meeting processes are to be done (the methods)
- **Being a good participant means –**
  - Be a responsible participant
  - Follow the norms
  - Be prepared
  - Be on time
  - Attend to how you are communicating
  - Attend to how you are working to make the meeting efficient and effective
  - Work for the greater good

Environment
What kind of meeting environment has been created?

Is it one which is –
- Safe
- Supportive
- Respectful
- Appreciates differences
- Objective
- Positive-focused
- Consensus-oriented

Leaders set tone and expectations.

Remember that being an effective meeting leader means –
- Plan for an efficient, effective meeting
- Start on-time (reward the timely), manage the time well & end on time
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Utilizing Plan & Tools for Effective Management of Time
- Use the meeting process tool to manage meeting content and time. (Plan in advance where you can cut if need be.)
- Use a time keeper.
- Use a parking lot.
- Document outcomes and action steps (What – Who – When) as you go.

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Effective Management of People

As a leader, you are responsible to manage problem behaviors for the good of the group, for the good of the outcomes and so that your role as leader is not diminished. Good meeting norms can help. (Post your meeting norms in the meeting room.)

- It's the *behavior;* and it may be lack of awareness
- Keep calm
- Keep to the facts
- Be firm, yet diplomatic
- Use the norms and group agreement on the norms
- Always give credit
- Avoid laying blame
- Provide constructive criticism in private
- Pause and give yourself time to think before responding
- In some instances: consider not including them in meetings

Part of your role as leader is to elicit and facilitate participation. Effectively doing this can help improve participant commitment to outcomes. Tips and ideas –

- Part solved through good norm setting
- Identify something all can agree upon – common goals – then go from there
- Offer pilot testing/trial period
- Interview people and report
- Create drafts and "straw" man proposals for reaction
- Prepare questions to pose
- Round-robin: everyone is asked to think up a solution or give their opinion. Time is limited for each to participate or limit number of ideas they contribute in the meeting. No judgment is rendered. Short discussion follows.
- Get all ideas presented without judgment initially –
- Likes; pros & cons; +/-
- Break into small groups (maybe assign who is in which group)
- Rank preferences – top 1,2 or 3 preferences
- Secret ballot

Effective Management of Outcomes and Future

Summarize key outcomes at the conclusion of each topic
- What
- Who
- By when

Have documented immediately

Problem Meeting Behaviors

Responsibility Issues
- Unprepared
- Inefficient
- Never participates
- Uncooperative

Self-Interest
- Takes a personal platform
- Protective of turf
- Hidden agenda

Communication Challenges
- Rambling
- Off-track
- Emotional
- Disruptive
- Negative or unconstructive
- Obsessive
- Domineering
- Argumentative

Things you can say to get participation, get focus, move on the agenda, deal with problem communications…
- "Does anyone else have an opinion?"
- "Let's hear from (someone else) (specific name)"
- "Your point is important, and our meeting objective is (refocus) – we can put that in the parking lot or discuss outside the meeting"
- "We've all agreed that one of our meeting norms is to keep solution-oriented. Can you give us an idea for a solution…?"
- "Let's keep to the facts."
- "Okay." Noncommittal response, then move on
- Restatement: "What I am hearing is…

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After

STOP!
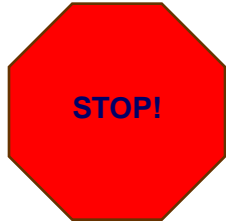
- Evaluation
- Documentation
- Dissemination
- Follow-through
- Reporting

Ideas for Evaluating Meetings

- Was this a good use of time? Was a meeting necessary or might have outcomes been accomplished in a better way? If yes, what:

Strongly Agree—to—Strongly Disagree

- It made sense to include me in this meeting
- The meeting was effective
- The meeting was run efficiently
- Attendees were good meeting participants
- Attendees followed norms
- I followed norms
- Meeting tone was positive, objective and constructive
- Enough time was allocated to important topics
- I had opportunity to contribute if I desired
- I came away with a sense of accomplishment
- I came away with a clear understanding of meeting outcomes
- What would improve this meeting:

Documentation, Dissemination, Follow-Through & Reporting

- Disseminate immediately
- Plan to check-in with people at a proscribed period of time to ensure tasks will be completed
- Use a tickler system
- Ensure reporting of progress and what ultimately happens
- If applicable, begin "before" steps for next meeting