Meetings That Work

Sample – This Sample contains sample pages from each Section.

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Manager's Toolkit Title

Contents

Note: This is the Table of Contents for the full version of "Meetings That Work". Items in blue represent hyperlinks available in full version. To view how a hyperlink works click on a red item.

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INTRODUCTION

People spend a lot of time at work in meetings. And according to recent surveys, many are a waste of time. If you're one of the majority that feels this way, I don't need to tell you the results. You know the feelings of frustration all too well. As well as the financial cost. If 4 people each earning $40,000 a year attend a 2 hour meeting that goes nowhere, that's a cost of $152 just for that meeting. Take that and multiply by the number of meetings you feel are a waste of time over a year and you are getting some real money. In this day and age when organizations are facing constant budget constraints, and are looking hard at all their cost elements, improving meeting quality jumps out as a "no brainer"

Fortunately, you don't have to be stuck with endless bad meetings. Meeting design is not rocket science. You can design and run effective meetings time after time by following a simple process. This book will show you how.

ABOUT THIS BOOK

This book is meant to be used as a tool, not a text book. You can probably read it in less than 45 minutes. The pages are laid out in the form of a job aid so you can go through them quickly and follow the steps to design your meeting. You can use the process for any size meeting. You can use it by yourself or with a group as appropriate. Once you get familiar with the process, you can design simple meetings extremely quickly by rapidly going through the steps to make sure you have everything covered. Complex meetings will of course take longer, but they should.

Section 1 covers the basics of a good meeting regardless of the subject. You'll learn:

- What it takes to make a meeting succeed
- Why many meetings fail
- Key roles in a meeting

ABOUT THIS BOOK (Cont.)

Section 2 covers the 8 Key Steps to designing an effective meeting regardless of the topic.

Section 3 provides tips on how to run effective meetings and how to handle some of the more common problems that can pop up in a meeting such as:
- The Group has a hard time getting started
- Participants meet you with stares and silence
- One person tries to dominate the discussion
- Personal Attacks against other participants or you, the Meeting Leader
- A participant tries to hijack your meeting for their own separate agenda

Section 4 provides a series of discussion frameworks to use in meetings where you need to:
- Brainstorm
- Solve Problems
- Make Decisions
- Plan Tasks
- Set Goals

ELECTRONIC FEATURES

This book contains a number of handy to use electronic features. It contains hyperlinks throughout that allow you to jump directly to a page you're interested in. Hyperlinks are indicated with blue text. To use a hyperlink simply put your cursor over the text containing it, and click your mouse. To return to the original page you've been reading, click the back arrow on your PDF reader's menu bar.

Note: To make sure you can return to the original page you've been reading by pressing the back arrow, click somewhere on that page first before clicking on the hyperlink.

You also have control over your printing. You can print out the entire book, a range of pages, or a single page as needed by using the "Print" option for your PDF reader.

Finally, you can store this electronic book in a folder on your PC and access it whenever you want. This can be very handy if you want to actually use it during a meeting, finding that you need access to a quick framework. Simply call up the book, go to the framework page and print it out.

SECTION 1

THE BASICS

WHAT MAKES MEETINGS SUCCEED?

Good meetings don't happen by accident. They have some important basic elements. Use this checklist to make sure you have the key ingredients.

- Meeting is well designed

- Meeting Leader is prepared

- Everyone agrees on the meeting's subject and desired results

- Participants understand their roles and participate appropriately

- The critical people are in attendance

- The meeting's discussion focuses on the topics at hand

- The Group uses Effective Discussion Processes

- Pertinent discussion and results are captured and used going forward as needed.

Key Points

1. Meeting has the right design. Make sure you have a formal Meeting Purpose Statement and Agenda and follow the Meeting Design steps beginning on page 16.

2. The Meeting Leader is prepared. An unprepared leader or one that tries to "wing it" sends a powerful signal to participants that the meeting doesn't really matter.

3. People know why they are there. There's no guessing about what the meeting is about or trying to accomplish.

4. Participants understand their expected role in the meeting. If left unstated, people can misunderstand their role and participate in ways that are a lot different than what's intended.

WHAT MAKES MEETINGS SUCCEED (Continued)?

5. The right people attend. If someone needs to be part of a decision, or present critical information, make sure they're at the meeting.

6. The discussion sticks to the Agenda and doesn't stray all over the place.

7. The group uses an appropriate discussion framework like problem solving, decision making, brainstorming, etc. that fits the topics to be discussed.

8. The results are captured in a format that can be used going forward—whether it's minutes, a summary of topics discussed, or copies of charts, etc.

MEETING ROLES/FUNCTIONS

There are usually four roles that need to be filled in a meeting. They are:

- Leader

- Resource

- Scribe

- Participant

In some meetings there will be a designated individual for each of the top 3 roles. In many meetings, however, people will play multiple roles. The important thing is to decide who is going to do what, and make it clear to everyone at the meeting.

THE LEADER

The Leader is usually the person who calls the meeting and takes responsibility for its design and planning. During the meeting the Leader's chief roles are to:

- Kick-off the Meeting

- Lead the Introductions

- Cover the Meetings Purpose, Desired Results and Agenda

- Make sure participants are clear on their expected role

- Direct discussion as needed so it sticks to the Agenda

- Focus attention on the Meeting's Content—what's being said versus the process.

PARTICIPANTS

Effective participation is vital for the meeting's success. Good participants just don't show up. They:

- Make sure they understand the meeting's purpose and desired results.

- Understand desired level of participation and participate accordingly

- Raise questions if they don't understand the meeting's purpose/desired results and/or their role so they get the needed answers.

- Follow the meeting's ground rules

- Feel and display a sense of ownership for the meeting's success.

SECTION 2

THE EIGHT STEPS OF EFFECTIVE MEETING DESIGN

STEP 1: AGREE ON THE MEETING'S SUBJECT

This first step gets you to actually write down the meeting's subject so everyone who is designing the meeting agrees on what it is. As simple as it sounds, it's often overlooked. That's because we often assume that everyone has the same idea of what the meeting is about, and that can be very dangerous in terms of good meetings.

To write a meeting subject statement:

- Write a simple sentence stating the meeting's subject.

- Make sure the sentence answers the question" "What's this meeting about?"

- Make sure that everyone designing the meeting agrees.

STEP 2: VISUALIZE THE DESIRED RESULTS

It's critical that your meeting's design specifies exactly what you're trying to achieve by meeting. One good way to do this is by imagining that you're talking with someone after the meeting and they are telling you that it was a great meeting because it……..(the desired results).

A good list of desired results:

- Answers the question: "What are the major accomplishments or products we want to achieve from the meeting?"

- Can include things like:
    - Shared understanding
    - Agreement
    - Solutions
    - Plans
    - Intangibles (sense of team/commitment, etc.)
    - Training

THE MEETING PURPOSE STATEMENT

The Meeting Purpose Statement has 2 parts:

- Statement of Meeting's Subject

- List of Desired Results

EXAMPLE

As an example of how to develop a Meeting Purpose Statement, let's assume our group wants to meet to discuss how to improve our meetings. The Meeting Purpose Statement for this meeting might look like the one below. (A Sample Agenda is shown on page 24).

Improving Our Meetings
Purpose Statement
June 20, 2005

Subject: Discuss Ways to Improve Our Meetings

Desired Results:

- Shared understanding of why we don't feel our current meetings are effective.

- Understanding of needed ingredients for successful meetings.

- Agreement on how to improve our current meetings by incorporating effective meeting design techniques.

- Agreement on who will be responsible for designing our next meeting.

SECTION 3

TIPS FOR RUNNING AN EFFECTIVE MEETING

GENERAL TIPS

Here are some tips for being an effective meeting Leader

- ● Prepare In Advance
    - Review the Meeting Design and Visualize how you want the meeting to go. Consider things like:
        - o How do want people to participate?
        - o What do you need to do/say to encourage that type of participation?
        - o How do you need to interact with the meeting participants?
        - o What are some of the potential problem areas you need to be on the lookout for, and how will you deal with them if they come up?
        - o Make sure that the Meeting's Resource and Scribe understand their roles, and what to expect based on your review of the above factors.

- ● Start on time

- ● Get people comfortable at the start of the meeting.
    - Thank people for attending and welcome them
    - Make sure everyone knows why they are there.
        - o Cover the Meeting's Purpose, Desired Results and Agenda
        - o Clarify who is doing what. Who are the Leader, Scribe, and Meeting's Resource?
        - o What participation is expected and from who?
        - o What are the Ground Rules/ Housekeeping/ Safety Items?

SECTION 4

DISCUSSION FRAMEWORKS

DISCUSSION FRAMEWORKS

Use these frameworks to guide your group through important discussions. The following table shows you when to use the frameworks in this Section.

Framework	Use
Brainstorming	Generate Ideas, Alternatives, Etc.
Problem Solving	Identify Problem, Problem Causes and Solutions
Decision Making	Identify Critical Success Factors, Decision Alternatives, Evaluation of Alternatives against Success Factors
Task Planning	Agree on What the Task Is, Task's Purpose and Desired Results, Actions, and Resource Requirements
Goal Setting	Developing and Setting Goals, Success Criteria, and Needed Actions

Brainstorming

What Is It?   Process for creatively generating ideas and alternatives

Brainstorming Wheel

Why Use It?   To benefit from new or different perspectives than the usual or traditional approach.
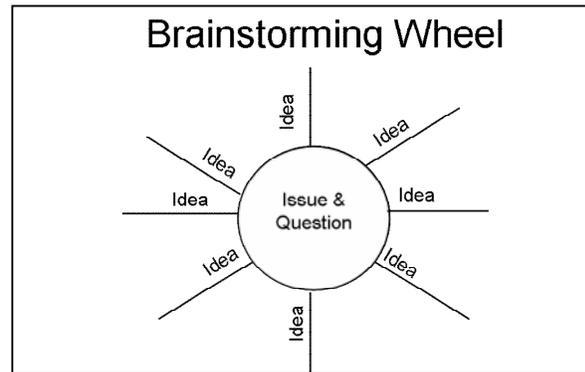
When To Use It: When you need to generate ideas on:
- New ways of doing things
- Different approaches
- New products or services
- Problem solution alternatives
- Decision options

Roles:

- Facilitator
  - Introduces Topic
  - Resources discussion by continually encouraging contributions from group
  - Ensures that ideas are not evaluated

- Scribe
  - Captures ideas on the Brainstorming Wheel

- Data Custodian
  - Prepares the idea summary handout and transmits to meeting participants

How to Do It:
1. Decide why you need to brainstorm. <u>Example:</u> We need to generate alternatives solutions to solve problem X

2. Frame this reason as a question. <u>Example</u>: How to….?

How to Do It: (Cont.)

3. Have participants respond to the question with ideas as quickly as they come to mind.

4. Visibly capture the ideas on a Brainstorming Wheel (see Figure 1.0)

5. Encourage members to build on each others' ideas.

6. Go until ideas have been exhausted.

7. Don't evaluate ideas until brainstorming session is over. Use an appropriate evaluation process like the Decision Making Framework to do so.

8. Summarize the ideas from the Brainstorming Wheel by topic so they can be circulated to the group for use in the evaluation process.

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