Effective Meetings

According to the National Statistics Council, there are 11 million meetings every day, with 37% of employees' time being spent in them. If the average person works 1,960 hours per year, this means each individual spends approximately 735 hours in meetings every year. That equates to 18 weeks, or almost five months of 40-hour work weeks.
Surely we owe it to ourselves to ensure that our meetings are as effective as possible; otherwise, the time we spend in them is just wasted.
The good news is that, with a few conscious actions, meetings can become a very productive business tool, and a good use of everyone's time.
Over the next few pages we will investigate some of the best practices currently being used, and ideas on how to implement them based on our experience.

First, let's look at what makes an effective meeting:

It is required. Meetings must be required to be effective. Ask yourself: is a meeting the best communication tool for the information to be exchanged?
The right people are present. Are the right people in the meeting? Do you have the people present who are critical to making decisions on the topic at hand?
It has a clear objective. What is the objective of the meeting? Do you have a clear idea of what you expect to be achieved in the time that has been set aside?
The right amount of time is scheduled for that objective. Timing, timing, timing. Ensure that the meeting starts and ends on time, and takes no more time than is necessary to achieve the objective.
It results in clear actions. Action! Ensure that clear follow up actions are agreed upon before the meeting is concluded.
Executing an effective meeting consists of four components: Preparation, The Meeting Itself, Concluding the Meeting, and Follow up.

Preparation

As with everything else in business, preparation is fundamental for success. We have all attended meetings that are a permanent fixture in our calendars, only to wonder why we were there, and feeling that we could be more effective doing "real work". The reason this happens is a lack of preparation and forethought.

Preparing for a successful meeting is not particularly complicated, but it does require some thought:

What is the overall purpose of the meeting? – Time is often allocated to creating an agenda, but first a focus on the specific purpose of the meeting is recommended. What is the overall **Objective**? What is the expected outcome? What decisions need to be made?

Who needs to attend? – Once the overall purpose has been established it will be necessary to understand who needs to be involved. Who has the required knowledge to make key decisions? Which of the stakeholders need to be involved? Who is likely to be responsible for actions resulting from the meeting?

How long does the meeting need to be? – All too often meetings are scheduled around specific periods of time, the most common of which is an hour. Does the meeting really need to take an hour? What amount of time will be needed to reach the Objective? The length of the meeting should be adjusted according to the Objective, and the amount of discussion required to reach it - no more and no less! If ever there were a good example of how to over-deliver, finishing on or before the scheduled end time of a meeting is it.

Location – Is the meeting to be held in the office building, or is it best to take the team offsite? A change of scenery can be particularly effective for more creative endeavors, for example; Strategic Planning, Brainstorming Activities, New Idea Generation.

Wherever the meeting takes place it is imperative to ensure the meeting room is comfortable and large enough for the group and type of activity planned. If breakout sessions are required, ensure there is sufficient space for the breakout groups to work autonomously from one another.

Agenda – An agenda is simply a list of the topics to be covered, and the order in which they will discussed - simple really, isn't it? However, agendas are typically overly optimistic and do not allow sufficient time for each topic. The temptation is to include as many items as possible and to cover them all regardless of whether the meeting overruns its allotted time.

With a clear purpose set, it is much easier to develop an agenda that covers only the topics necessary to achieve the goal. Allow sufficient time to cover each topic and be realistic about the amount of discussion time required. Treat the agenda as a guide rather than an absolute representation of how the meeting will unfold. This keeps the focus on achieving the objective, rather than checking off a list of topics.

Prepare the participants – Is there information that the participants need to prepare for the meeting? Distributing this ahead of time will save a lot of time in the meeting reviewing data.

During the Meeting

Keeping your time efficient means having some structure to hold everyone to the objective you have set out, and making roles clear. Shorter meetings may require less structure, but these tools are critical for important meetings.

1. ***Ground Rules*** – It is important to establish standards of behavior that keep the meeting moving while respecting every participant's input and value to the group. The tool for this is a set of Ground Rules, presented at the start of every meeting and agreed upon by every participant.

   Here are some examples of typical Ground Rules:

   - ***Big Picture View –*** *what's good for the group or organization, rather than what is good for a particular individual or team*
   - ***Windshield –*** *do not rehash the past, look forward*
   - ***ELMO –*** *don't beat a dead horse, Enough, Let's Move On*
   - ***Build Up, Therefore –*** *do not criticize others' ideas, offer an alternative*
   - ***Rule of "3" –*** *wait for 3 others to speak before speaking again, great for the known spotlight hogs*
   - ***Silent, not unhappy*** *– speak up if you have something to add. It's OK to be quiet, but if there is an issue, it needs to be discussed.*
   - ***Donut rule*** *– focus on making what is better, not on wishing for what you don't have*
   - ***100-mile rule*** *– if you wouldn't drive 100 mile to take care of it, stay here and engaged*
   - ***If > 60 sec late?*** *(What is the penalty for people arriving back from breaks late?)*
   - ***Technology?*** *(Cell Phones, iPads, Laptops can all be very distracting, or useful. Let the group decide what rules need to be in place to reduce distractions)*
   - ***Side Conversations?*** *(Instead of whispering to a friend, let the whole group hear the discussion.)*

   There are no hard and fast rules as to what Ground Rules should be, but make sure you address the most common derailing behaviors, such as timeliness, a few vocal participants dominating the conversation, criticism too early in a process, and getting stuck in a long-winded or unproductive conversation.

2. ***Review the Objective*** – Be sure that the Objective is clearly outlined to the participants to help focus everyone's attention on the expected outcome of the meeting, and if need be, it can be used to refocus the group at any time if they veer off topic.

3. ***Agenda Review*** – Reviewing the agenda at the start of the meeting will help reassure the participants that there is a purpose to being there. It is also a good opportunity to gain buy-in by asking if there is anything that needs altering to ensure the overall objective is met. Showing a willingness to adjust the agenda based on participant input is a powerful tool to keep everyone engaged.

4. ***Parking Lots*** – Use parking lots to keep the meeting on track. There are two parking lots that help the most, particularly for longer strategic meetings.

   Issues: Use this parking lot to collect any issues that arise during the meeting. Issues are items that are not relevant to the particular meeting being held, but need to be addressed. Or they are items that are not fully resolved in the meeting due to lack of information or not having a critical member of the team present.

   Actions: Use this parking lot to capture any specific actions that are agreed upon along with the name of the person responsible and an expected due date. At the end of the meeting the issues board should be reviewed, and any item that has not been resolved during the course of the meeting will need to have a specific action created to get it resolved. Again a responsible person needs to be identified along with a due date.

5. ***Personal Goals*** – During the opening of the meeting, after presenting the Objective and Agenda collect every participant's idea of what will make the meeting successful. This is a great way to gain participant input as they now have a vested interest in the outcome.

6. ***Roles*** – There are three key roles that need to be fulfilled for a successful meeting:

   Time Keeper – This person is solely responsible for making sure the meeting stays within the time frame allotted. It is not necessary to keep track of each individual agenda item, but it is important that the end time is adhered to. Letting meetings run over the allotted time is a sure way of showing a complete lack of respect for the participants' schedules.

   Scribe – To ensure an accurate record of what transpires during a meeting it is important to have someone responsible for keeping comprehensive notes. Whether these are formal minutes will depend on the purpose of the meeting and the culture of an organization, but to have a record of what was discussed, the decisions made, actions items etc. will prove invaluable in following up.

   Facilitator – The facilitator is the person "in charge" of the meeting. They ensure that everyone participates, discussions are productive, agenda items are covered within the allotted time and ground rules are followed. Facilitators generally manage the tone and outcome of the meeting. If it feels like the meeting is running off course, it is up to the facilitator to bring it back on track and to check in with the participants if a tangential conversation feels important. The facilitator opens the meeting by setting the scene through the objectives and closes the meeting by reviewing the progress made, participants' goals and confirming follow up actions. The facilitator is not necessarily the group leader, and for important meetings you may want an experienced outside facilitator so that everyone else can focus on participating.

Closing the Meeting

An often forgotten part of a meeting is the closing. Often, meetings are just disbanded and everyone leaves to get on with what they were doing beforehand. Closing the meeting productively only takes five minutes and it is critical to making sure the meeting was effective. Be sure to leave enough time in the agenda to do this, and focus on the following:

1. ***Review Progress*** – Where appropriate, review the work that was done in the meeting, this is a great way to emphasize how productive the time was. This is particularly important when meetings take place over many hours or even days, such as Strategic Planning. There is nothing more visually rewarding than a wall full of flip charts that illustrate all the work that was completed and decisions that were made.
2. ***Review Issues Parking Lot*** – Make sure this parking lot is empty before everyone leaves the meeting. All items should either have been covered during the meeting (make sure everyone agrees this is true), or they need to be added to the action list with a due date and responsible person identified.
3. ***Review Personal Goals*** – Remember at the opening of the meeting it was suggested that the participants are asked what they wanted to get from the time together? This is where those goals and objectives are reviewed. Read them one by one and ask if this has been covered. If all goes well, every participant will feel they have met their personal objective and feel very satisfied that the meeting was productive. If something has not been covered, as the facilitator, decide whether it can be taken care of with a quick discussion or if there is a separate action that needs to be taken.
4. ***Actions*** – Before everyone leaves the meeting, ensure that follow up actions are clearly defined for each individual. These can be actions captured on the parking lot, or individual actions such as distributing notes, setting the next meeting, informing others of what happened during the meeting, etc. The closer you can get to every participant leaving with an action, the better.
5. ***Plus / Delta*** – In the spirit of continuous improvement, feel free to do a quick poll of what the participants liked or would like to change for the next time. This way you are given an opportunity to make the meetings even more effective as the participants will feel more vested in their success.

Follow up

The meeting was a success and everyone in the room took on action items. It is important now that everyone is held accountable to follow through on those actions. The meeting organizer's responsibility is to keep track of when actions were due and who was responsible, and follow up with them at the appropriate time to make sure everything is on track.

If certain actions are not completed before the next meeting you have great topics for the next agenda!

Meeting Formats

Drawing from Patrick Lencioni's work in "Death by Meeting" there are specific meeting formats that are very effective.

Daily 5 Minute Stand Up – This is often the most difficult to implement, but is a very powerful tool in aligning team activities for the day, and prevents the need for emails to coordinate activities. Keeping these meeting short is critical to their success, and making them a standing meeting will ensure they do not run on. Remember the purpose of this is to align the day's activities, nothing more. Any issues identified here need to be addressed in a separate meeting after this one closes.

Weekly Tactical – This should last between 45 and 90 minutes depending on what needs to be discussed. Resist the temptation to make this a status update meeting. Share any information ahead of time and only focus on specific issues during the meeting, rather than go over what is working. By all means spend a short time at the opening to celebrate successes. This sets a very positive tone for the meeting in general. The agenda for this meeting should be made AT the meeting (a real-time agenda), this way only the topics that need to be discussed will be included, keeping the meeting concise and timely.

Monthly Strategic – So far we have considered a daily activity review and weekly tactical review, but to integrate strategic thinking into the organization there needs to be a regular review of the longer-term strategic initiatives. Timing for this meeting will vary, but expect to need 2 to 4 hours to allow sufficient time have productive dialogue. The purpose here is to delve deeply into a few key strategic areas without being sidetracked by tactical or time-critical issues. This is an ideal time to bring out the Strategic Plan and monitor progress against the plan. Are the tactics being employed effective at moving toward the expected strategic goal? Are the strategies identified in the plan effective in moving toward the expected goal? What new information has come to light that will effect our earlier decisions? Are there changes that need to be implemented to achieve the plan goals?

Quarterly Offsite – This is an opportunity to take the leadership team offsite and have a detailed plan review. Every month one or two strategies have been reviewed at a monthly meeting. This is the opportunity to review the entire Strategic Plan, monitor progress against the Goals and make course corrections as needed. Taking this meeting offsite allows for attention to be focused on the task at hand, free from distractions and interruptions. By having this review every quarter, strategic thinking will be embedded in the leadership team and ensure that new information relating to external forces is integrated into the plan in a timely fashion.

Timing

Finally a word on timing for meetings - how long do they need to be? The answer: Long enough to achieve the objective and no more!

This is why the meeting objective is such a useful tool. Once the agreed meeting objective has been achieved, it's time to close the meeting and dismiss everyone with clear actions. Just because the meeting was scheduled for an hour does not mean that everyone needs to stay in the room for that hour. If everything is completed after 45 minutes, give that time back to the team - they will be forever grateful.

That being said, never let the meeting overrun without prior agreement. If you can see that it is likely to run on, get consensus from the group to either continue until complete, or reschedule a follow up. This way everyone feels respected and will respect future meetings start times, preventing latecomer interruptions or delayed starts.

The Ultimate idea – The Flipped Meeting!

During an interview for *Fortune* Magazine, Jeff Bezos of Amazon revealed how he keeps his meetings productive, here is what he had to say:

"We have study hall at the beginning of our meetings. The traditional kind of corporate meeting starts with a presentation. Somebody gets up in front of the room and presents with a PowerPoint presentation, some type of slide show. In our view you get very little information, you get bullet points. This is easy for the presenter, but difficult for the audience. And so instead, all of our meetings are structured around a 6 page narrative memo."

He goes on to explain how the 6 page narrative memo is structured:

"The six-page narratives are structured like a dissertation defense:

1) The context or question.
2) Approaches to answer the question – by whom, by which method, and their conclusions
3) How is your attempt at answering the question different or the same from previous approaches
4) Now what? – That is, what's in it for the customer, the company, and how does the answer to the question enable innovation on behalf of the customer?"

"For new employees, it's a strange initial experience," he tells *Fortune*. "They're just not accustomed to sitting silently in a room and doing study hall with a bunch of executives."

Bezos says the act of communal reading guarantees the group's undivided attention.

Writing a memo presents its own challenge, typically, presenters have become accustomed to creating a list of bullet points on a slide, without much thought to the message they are trying to communicate. "Full sentences are harder to write," Bezos says. "They have verbs. The paragraphs have topic sentences. There is no way to write a six-page, narratively structured memo and not have clear thinking."

Whether you use a 6 page narrative memo, or our preferred format of a ***1 page memo*** is not important. The important point here is that distributing information ahead of a meeting in a clear and structured manner prevents a lot of time being wasted on presentations to simply provide a status update or to make an argument. The time in the meeting can be spent on problem-solving, debate and planning.

In Summary

Making meetings more effective is not particularly difficult, but is does require some effort. The purpose of this paper is to provide some insight and tools to help make meetings better attended and more productive.

Consider, as stated at the beginning, that on average each of us spends 735 hours per year in meetings, if by focusing on making them more effective this number is reduced by a mere 5%, that would give every employee an additional 37 hours to spend on their other tasks… almost an entire week!

Your Next Steps

How would you like to change the way meetings are performed in your organization? Where could meeting be replaced by another form of communication? What steps could you take to make improvement for yourself and your team?

Next time you schedule a meeting where an impartial ***facilitator*** would ensure all points of view are considered, and ***key business decisions*** are made, consider hiring a ***professional*** from outside your organization. Or at least find someone from outside the department, group or team to lead the meeting.

TRANSCEND

About Transcend

We founded Transcend in 2002 and now serve clients across the world in responding effectively to a changing environment – individually, in teams and entire organizations. We have a broad network of coaches, consultants and facilitators to create flexible teams tailored to the scope and goals of your project and to bring the right tools to bear on your organizational challenges and create sustainable results.

Our Core Belief:

We believe that change is an ongoing process, not a one-time intervention, and that today's organizations are confronted with constant change in the marketplace. These organizations and their leaders desire to develop a proactive rather than reactive approach and are looking for new ways of approaching leadership, business and their organizations to achieve long-term results.

Therefore we must deliver real-world solutions based on the best research and tools for leadership, change management and organizational excellence through deep trust-based relationships to develop and introduce the appropriate concepts, processes and skills at the right moment, and ensure they are sustained over time

What makes us unique:

- We bring real ***hands-on experience in running businesses***, marketing and sales teams and strategy consulting
- We are ***ruthlessly results-oriented*** and work to embed learning and change for long-term results rather than "nice" one-time events.
- We have been in the shoes of the business leader and ***understand the unique challenges*** and pressures on them
- We bring ***industry experiences*** in hi tech, bio tech, consumer goods, manufacturing, services and software
- We have a ***portfolio of satisfied customers*** who view us as trusted advisors and their "go-to" team for key business challenges
- We ***work easily with C-suite through line managers*** to create meaningful behavioral and process change and business impact
- We ***shoot straight and can deliver the uncomfortable truth*** when necessary to accelerate positive change
- As long-time change agents, ***we enjoy the process of change and can help support it*** in teams and organizations where change is needed but uncomfortable for the participants

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