

WILY MANAGER

*Just-in-Time
Management
Advice*

Effective Meetings









This is one of a series of booklets available at www.wilymanager.com

Why improving meetings is a critical business issue

Almost every manager has a problem with lack of time, yet few critically evaluate how they spend their time. For many leaders, the amount of time spent in meetings every week is considerable; for many, meeting time eclipses all other activities combined.

For this reason, meeting effectiveness is a critical leadership issue that requires improvement in just about all organizations. A survey of 1000 managers indicated that 33% of time spent in meetings was wasted. These same managers estimated they spend about 17 hours per week in meetings.

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This equates to almost 6 wasted hours per week, or 300 wasted hours per year for each manager.

If each manager is being paid an average of \$50,000 per year the fully burdened impact of this is over \$11,000 of wasted value for each manager. This amount compounds quickly when multiplied by the number of managers. It is contingent upon every manager to actively look to improve this part of their business.

Reasons to Have a Meeting

The first question to ask about any meeting is, “why have it at all?” A poor answer would be, “It’s Tuesday at 10am, so we’re having a meeting”. More valid reasons to conduct a meeting are:

- to identify a problem or opportunity
- to solve a problem or progress an opportunity
- to obtain commitment or consensus for approval or action

If meetings are scheduled solely to distribute information (like a college lecture) there are other media that might be better suited to achieve this purpose. Likewise, if meeting ends



Most managers spend about 17 hours per week in meetings...and about 33% of that time is wasted



up becoming a series of one on one meetings with a dozen witnesses, then it might be time to consider doing something different.

Ultimately, people should be brought together in meetings to achieve outcomes that would not be possible by other means of communication. A second test of the validity of holding a meeting is the number and quality of actions that emerge as a result of that meeting. A meeting that does not produce tangible action items is quite likely a waste of time.



Effective Meetings

Good meetings always have consistent characteristics, as do poor meetings.

Good meetings:

- Have a defined purpose and clear objectives with a written agenda
- Members have prepared in advance and are engaged
- Balance of discipline, flexibility, and diplomacy
- Members have defined roles and respect established ground rules
- Efficient, result focused, and ultimately save time and effort
- Result in a series of tangible action items

- Capture insights and enthusiasm
- Motivate people to specific action
- Are documented and summarized with commitments well understood

Ineffective Meetings

- Lack participation and/or participants are not prepared
- Dominating leader or member, unbalanced involvement
- People don't listen to each other
- Go off track and stay off track for too long
- Inefficient, results unclear
- Ideas and different views are criticized or squelched
- Action assignments and outcomes are not clear

Four Points to Meeting Effectiveness

There are a variety of formats for effective meetings. It matters less which methodology is used, and more how disciplined an organization can be about using a prescribed format. Here is one such format:

1. **Prepare**
2. **Communicate**
3. **Control**
4. **Document and Follow-up**

Prepare

A significant portion of the success of a meeting is determined before it ever takes place. Begin by assuring the following four elements:

- Ensure the purpose of the meeting is well understood. Ask what would happen if this meeting did not take place
- Prepare the agenda in advance
- Ensure that the desired outcomes of the meeting are articulated in advance
- Make sure all the participants are prepared in advance

Defined Purpose

Why are we having this meeting? Possible reasons:

- To solicit information from a group
- To answer questions
- To participate in group decision making
- To brainstorm ideas or solve problems
- To sell an idea

Related Wily Manager Topic Bundles

The One on One Meeting

The Skip Level Meeting

Business Review
Meetings

RACI – Responsibility
Charting

Visit
www.wilymanager.com
to get free cheat sheets
about these topics
(and many others)

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Four Points to Meeting Effectiveness, continued

Prepare the Agenda

- Clearly articulate the purpose of the meeting
- Decide what will be on the agenda
- Decide how much time will be required for each item.
- Who is invited? Date, time & place
- Distribute all relevant information in advance; do not give people things to read during the meeting
- Have the agenda printed out or written on a flip chart or whiteboard
- Try putting quick items at the start and clear the deck for the larger items
- Don't worry about what is formal, worry about what is effective

Determine Desired Outcomes

- What is to be accomplished or gained?
- How will this meeting contribute to the goals of the organization?
- What decisions will be made? What action will result?

Prepare Participants

- Send the agenda out early to inform participants about the objectives of the meeting
- Increase involvement by encouraging all participants to plan in advance for the meeting
- Follow-up with anyone who has a particular task to do at the meeting
- Send out all materials or documents to be read in advance of the meeting

See Appendix D for a [Meeting Preparation Checklist](#). When preparing for a meeting, it is also useful to determine the type of meeting ahead of time. See Appendix G for [Types of Meetings and Tips for Success](#).

Communicate

Preparation in advance is crucial to an effective meeting, but it is wasted effort if those preparations are not shared with other participants.

- Inform the participants of the details of the meeting
- Communicate the purpose and desired outcomes for the meeting
- What will be discussed and why
- What preparation is required in advance
- Prepare and distribute an agenda in advance
- Distribute the 'ground rules' in advance when appropriate (see [Appendix C for Sample Ground Rules for Meetings](#))
- Do not allow surprises at meetings; ensure all participants have had time to premeditate on any decision they will be asked to make.

Control

Much of the success for a meeting is determined in advance; however, the best efforts can be subverted if the meeting is not properly controlled. During the meeting:

Continued on next page

Four Points to Meeting Effectiveness, continued

- Start on time – do not ‘recap’ for latecomers. If you fail to accommodate lateness, people are more likely to be on time
- Review agenda and adjust if necessary
- Assign roles and review ground rules (Appendix B contains [Role Definitions for Meetings](#), and in Appendix C you will find [Sample Ground Rules for Meetings](#))
- Stick to the meeting process, roles and time guidelines. If you run into problems, try using some of the ideas in Appendix A: [How to Get a Meeting Back on Track](#)
- Encourage equality in participation
- End on time or early when possible
- Do a quick process check at the end of every meeting
- Use a ‘parking lot’ to keep on the agenda

Document and Follow Up

- Capture ideas on a white board or a flip chart
- Clarify actions and assign names and deadlines to them
- Record main discussion points and decisions for future reference. This list becomes your meeting minutes. Appendix E contains a [Meeting Worksheet](#) that you might find useful for this purpose.
- Get the action items out within 2 days
- Follow up between meetings to encourage completion
- Get the next agenda out one week before the next meeting
- Do a process check at the end of every meeting:
 - ✓ What was the goal?
 - ✓ Was the goal achieved?
 - ✓ Did tangible actions result from this meeting?
 - ✓ What worked well?
 - ✓ What needs to be improved?

Related Topic Bundles

[The One on One Meeting](#)

[The Skip Level Meeting](#)

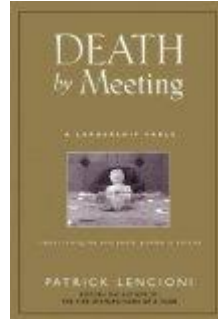
[RACI – Responsibility Charting](#)

[The Business Review Meeting](#)

Wily Manager Picks

[Death by Meeting: A Leadership Fable...About Solving the Most Painful Problem in Business](#)

Patrick Lencioni



[Meetings, Bloody Meetings](#)
(video)

John Cleese Training

Too busy to read? Be a Wily Manager and keep up to date with book summaries instead.
www.summary.com

Appendix: Tools and Resources

- A. [Getting Meetings Back on Track](#)
- B. [Role Definitions for Meetings](#)
- C. [Sample Ground Rules for Meetings](#)
- D. [Meeting Preparation Checklist](#)
- E. [Meeting Worksheet](#)
- F. [Meeting Rating Form](#)
- G. [Types of Meetings and Tips for Success](#)
- H. [Where to Get More Information](#)

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Appendix A

How to Get a Meeting Back on Track

It will happen to you – you’ll be sitting in a meeting when it will suddenly occur to you that the proceedings have become completely derailed. If you’re the leader or the facilitator of the meeting, it is your job to get it back on track right away. If you’re another participant, you can still take some action to try to recover the situation. The suggestions below are not appropriate in every situation, but carrying this list to meetings you suspect may become unglued may provide some thought-starters as to how to fix things:

Suggest an item for the parking lot: this allows whoever brought it up to feel as though s/he has been heard, and allows redirection of the meeting back to the intended issues.

Suggest taking an issue ‘off-line’ (for example, “Perhaps you can connect with Jane after this meeting, and follow up on that”). This technique does not minimize a concern that has been brought forward, but rather suggests a better time and place to pursue it.

Encourage people to be specific and move beyond generalizations. People love to make generalizations that may or may not be fair comment. Either way it is valuable to challenge people to provide a specific example of their feedback to ensure you are dealing with an issue worthy of the meeting.

Summarize what’s been accomplished. Sometimes if groups become “stuck”, it is well worth restating where the conversation started, and what the desired outcomes are in order to refocus the energy

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- A. How to Get a Meeting Back on Track
- B. Role Definitions for Meetings
- C. Sample Ground Rules for Meetings
- D. Meeting Preparation Checklist
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- G. Types of Meetings and Tips for Success
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Appendix A, continued

back to the issues at hand. A skilled facilitator should do this intuitively, but any member of a group can do so at any time.

Restate Ground Rules. If poor behavior or interpersonal conflicts rear their ugly head, it is worth restating the ground rules with the hopes that the offenders will realize they are out of line.

Review the Meeting Process. If a group is discussing something that is somewhat off topic, and it is unclear as to what is to happen next, it is worth reviewing the meeting process with the group. For example, you may say to the group, “We allotted 30 minutes to discuss this issue, which we have now exceeded. Do you want to spend more time talking about this, and defer issue X to another meeting, or should we move on now?” Allow the group to decide.

Target individuals for extra attention. Ironically, those most guilty of pulling a meeting off track are usually the ones that complain loudest about the fact the meeting has been derailed. A leader or facilitator should pull the person aside during a break, and explain that their behavior in the meeting is problematic.

Process Check. All meetings should end with a process check so the next meeting can be improved. However, if the group is ‘stuck’, it may

be worth doing a process check mid-meeting. Typical questions to ask are:

- Are we headed towards achieving the outcomes we decided upon for this meeting?
- What has worked well for us in this meeting?
- What do we need to improve upon in this meeting?

Focus on the situation or ‘interest’ not a specific position. If a meeting is contentious, it is important that all participants focus on the specific situation, and the interests of all parties involved. It is not productive to take a specific position and dig in ones heels without fully considering the larger picture.

Active listening. If all participants commit to listening respectfully and carefully to all others, there is a much higher likelihood of success.

Appendix B

Role Definitions for Meetings

Having clearly defined roles for specific meetings will assist with the meeting process and move things along much more smoothly. Here are **five typical roles** in a meeting, and the expectations of those roles:

Leader

- Ensures purpose and objectives are clearly understood
- Develops and presents the agenda
- Prepares participants
- Make sure all other roles are assigned and executed well
- Helps the group make a decision
- Focuses on action and outcomes
- Prepares well before the meeting, and follows up after the meeting

Facilitator

- Sets up the room
- Reviews the ground rules
- Keep the group and speakers focused
- Record comments
- Protects the process of the meeting
- Encourages the expression of various viewpoints
- Uses humor where appropriate
- Remains neutral
- Takes regular breaks
- Makes suggestions to the group to move things along

Time-keeper

- Assists the group in starting and ending on time
- Pays attention to time spent on specific agenda items, and makes the group aware when time is short or exceeded

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Appendix B, continued

The Scribe

- Records decisions and actions
- Prepares minutes

All Participants

All participants must share the responsibility for making a meeting successful.

- Listen attentively to other participants
- Provide input and contribute
- Prepare fully in advance
- Be on time and stay for the duration of the meeting
- Turn off telephone and other personal digital assistants
- Challenge ideas, but ultimately accept the outcome of any group decisions
- Assist other members in their assigned roles

Appendix C

Sample Ground Rules for Meetings

Groups are encouraged to **make up their own ground rules** specific to their situation. Here are some generic ground rules as thought-starters:

- Be on time, and do NOT accommodate latecomers by reviewing what they have missed
- Stay for the duration of the meeting – provided it ends on time
- Turn off telephones and other personal digital assistants
- Be completely at the meeting in mind and in body. Do not bring other work to a meeting, or respond to emails while others are talking
- Respect individual differences
- Consider and/or accept opposing points of view
- Express disagreement with ideas without criticizing people
- Avoid defensive behavior – denying problems, changing topics or cutting off speakers
- Allow others to talk without interruption
- Listen carefully before responding.
- Restate what others have said for clarity
- Demonstrate a willingness to compromise or seek consensus
- Leave disagreements at the meeting
- Stick to the agenda
- Separate people from problems

Appendix D

Meeting Preparation Checklist

Meeting Preparation Checklist			
Have You...	Yes	No	Notes
Identified the purpose of the meeting?			
Identified the objectives of the meeting?			
Selected the participants and identified roles?			
Identified the decision making process (leader decision, vote, consensus)			
Decided where and when to hold the meeting and confirmed availability of the space?			
Identified and confirmed availability of any needed equipment?			
Notified participants of when and where?			
Developed a preliminary agenda with purpose and objectives clearly stated?			
Sent the preliminary agenda to key participants and other stakeholders to sound them out in advance?			
Finalized the agenda and distributed it to all participants?			
Sent any reports or items needing preparation to participants?			
Verified that all key people will attend?			
Prepared yourself (handouts, slides etc.)?			

Appendix F

Meeting Rating Form

Meeting Rating Form									
Meeting Planning									
1	2	3	4	5	6	7	8	9	10
No idea why I'm here					Clearly defined purpose & outcomes				
Information									
1	2	3	4	5	6	7	8	9	10
I just showed up					Agenda and relevant information sent in advance				
Agenda									
1	2	3	4	5	6	7	8	9	10
There isn't one					Purpose, desired outcomes, time requirements				
On-Track									
1	2	3	4	5	6	7	8	9	10
Meeting lacked focus, strayed off topic and dwelled on trivia					Meeting showed orderly progress on task and followed agenda				
Participation									
1	2	3	4	5	6	7	8	9	10
A few members dominated, others said nothing					Everyone contributed ideas and took part in the conversation				
Listening									
1	2	3	4	5	6	7	8	9	10
Two or more people spoke at once. People failed to listen to each other					Team members listened respectfully and spoke one at a time				
Results									
1	2	3	4	5	6	7	8	9	10
We could have done better by working independently					We achieved better results by working together				
Summarizing and Recording									
1	2	3	4	5	6	7	8	9	10
We have no idea what happens next					Action items and follow up are clearly articulated				
Success									
1	2	3	4	5	6	7	8	9	10
The meeting was a waste of time					Overall, the meeting was very worthwhile				
Volume of meetings:									
Number of hours per week (on average) I typically spend in meetings:									

Appendix G

Types of Meetings and Tips for Success

There are several different types of meeting for different purposes. The conditions of each meeting are slightly different, so it is wise to determine what type of meeting it is before planning:

Daily status or check in meeting

- Limit time to most pressing issues, or changes since the previous day
- Do not sit down for this meeting
- This meeting should be about 15 minutes, and never exceed 30 minutes
- Used to re-establish priorities, and keep everyone up to date. This meeting is most often used in an operating environment.
- These meetings are almost exclusively activity focused.

Weekly or Regular Staff Meeting

- These meetings may occur one a week or once per fortnight, and are still reasonably tactical.
- More strategic issues should be deferred to Issue or Strategy meetings.
- Cancel the meeting if there is not enough to discuss
- Have a standing agenda – schedule other meetings to deal with extraordinary issues
- End the meeting early if there's not enough to talk about
- These meetings should run between 30 and 90 minutes
- If using these meetings for updates

from all participants, limit each person's time to 2 minutes. Updates should be used as a catalyst for off-line discussions or further meetings when appropriate

- Progress reports should be supplemented by material that is handed out in advance. It is of very little value to update people reading bullets off a Powerpoint slide. Provide data, graphs and/or key metrics to everyone in advance, and then use the meeting to answer questions or explain these aids

Issue meeting

- Be meticulous in ensuring everyone knows objectives and desired outcomes
- Ensure everyone has all relevant documents in advance of the meeting and are well prepared before the meeting day.

Strategy or Annual Planning

- Ensure everyone has all relevant documents in advance of the meeting and are well prepared before the meeting day.
- These meetings should include very little tactical data and be focused on a time horizon of months and years, as opposed to days and weeks.
- This is the meeting to debate high-level

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Appendix G, continued

issues and strategies

- Ensure a parking lot is used to avoid the almost inevitable descent into more tactical issues.
- These meetings may last several hours or even more than one day. It is important strike the balance between limiting the time to enable the exploration of ideas, without allowing it to take days and days.

Business Review Meetings

- Business review meetings should be conducted monthly or quarterly depending on the type of business and the frequency of changes and/or reporting results.
- The bulk of the value for a BR meeting occurs as the participants prepare for the meeting. The presentation is the culmination of the valuable work that has been done in advance.
- Each participant should present his/her high-level goals and objectives for the year, and then report progress against those goals.
- All reports should be supported with data and graphs to illustrate the progress being reported on.
- Should be forward-focused to describe how key performance indicators will be advanced in the coming months.

Appendix H

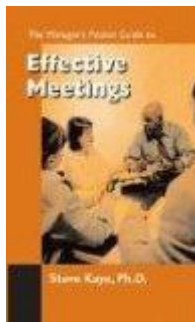
Where to Get More Information



Books:

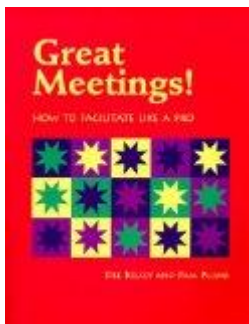
Death by Meeting: A Leadership Fable...About Solving the Most Painful Problem in Business (Patrick Lencioni)

“Lencioni offers practical advice on how to revitalize your business by energizing your business meetings.”



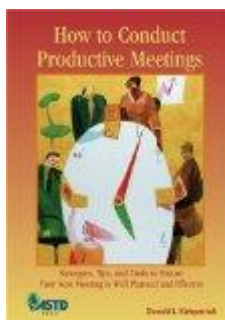
The Manager's Pocket Guide to Effective Meetings (Steve Kaye)

“Learn easy, proven techniques that keep you in control of your meetings. This complete guide to effective meetings will show you how to prepare for success and end with results. It includes structured activities that keep everyone focused on your issues, practical techniques for dealing with unproductive participants, and essential considerations for high tech meetings. If you hold meetings, this book is a must!”



Great Meetings! How to Facilitate Like a Pro (Dee Kelsey et al)

“Great Meetings! is a user-friendly resource book designed to help meeting leaders, facilitators, and participants understand the important steps for planning and facilitating a great meeting. It is also a useful text for facilitation and meeting management training. Topics include: What is facilitation, getting to know your group, preparing for a meeting, designing a great meeting, problem solving process tools, maximizing your group's potential, promoting positive communication, managing conflict, intervening, and using graphics.”



How to Conduct Productive Meetings: Strategies, Tips and Tools to Ensure Your Next Meeting is Well Planned and Effective (Donald Kirkpatrick)

“Meetings are often poorly planned and executed events that produce no meaningful business results. How to Conduct Productive Meetings is a book designed to provide practical tools and advice for anyone planning or facilitating a meeting. Legendary evaluation guru Donald Kirkpatrick offers solid and timely advice to ensure that a meeting is necessary, the presentation is professional and effective, the participants contribute in constructive ways and the outcome is measurable.”

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Appendix H, continued

The Complete Handbook of Business Meetings (Eli Mina)

"We didn't get anything accomplished in there." "Well, that was a complete waste of time." "I couldn't get a word in edgewise."

Sound familiar? These are just some common reactions to meetings. Needless to say, meetings are frustrating for lots of people. And, to top it all off, the books that are supposed to help improve meetings--bombastic tomes on formal "rules of order" or vague, theoretical texts on "meeting dynamics"--just amplify the frustration.

*Now, there's a clear, authoritative reference designed to help readers have more productive, more meaningful meetings--whether they're organizing, chairing, or attending; whether it's a small, informal staff meeting or a large formal board meeting. Jam-packed with useful tools, easy-to-implement ideas, and practical, specific guidelines, **THE COMPLETE HANDBOOK OF BUSINESS MEETINGS** will help readers:*

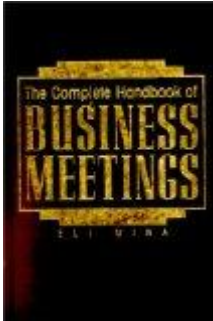
** Manage time, people, and issues more effectively * Identify and remedy common meeting ailments * Demystify and humanize formal rules of order * Convert passive observers into active contributors * Make deliberations more focused, meaningful, and relevant * Handle contentious or controversial meetings * Make meetings more engaging, dynamic, and even fun! * Assert themselves without getting angry * Deal with disruptive attendees without being adversarial * Conduct "virtual" meetings, teleconference meetings, and videoconferencing.*

The Manager's Guide to Effective Meetings (Barbara J. Streibel)

*"Meetings can either be the bane of employee life or they can help facilitate the cooperation needed to efficiently and effectively work together. **The Manager's Guide to Effective Meetings** shows you how to plan and conduct meetings that involve each participant, promote a strong sense of community and, most importantly, drive your organization forward. Look to this latest volume in McGraw-Hill's popular Briefcase Books series for field-proven techniques and strategies to:*

- *Begin each meeting with purpose--and end it with accomplishment*
- *Head off time-wasting interpersonal conflicts and turf battles*
- *Learn how to use technology to hold "virtual" meetings*

*In our increasingly collaborative work environment, the ability to manage results-driven meetings has become a critical career asset. Let **The Manager's Guide to Effective Meetings** provide you with a step-by-step template for energizing your next meeting, and transforming it from a roomful of clock-watching individuals into a collaboration of involved and enthusiastic partners.*



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Appendix H, continued

Books (cont.):

[Making Meetings Work: A Guide for Leaders and Group Members](#) (Leland Powers Bradford)

[Effective Meeting Skills](#) (Marion E. Haynes)

Videos:

[Meetings Bloody Meetings](#) (John Cleese Training)

Websites:

www.effectivemeetings.com

www.thefacilitator.com

www.meetingwizard.com

www.managementhelp.org/misc/mtgmgmnt.htm

www.toolpack.com/meetings.html

www.manager-tools.com/podcasts/effective_meetings.pdf

www.chacocanyon.com/pointlookout/meetings.shtml