

Getting Results from Meetings

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Meetings are Now The Fabric of Our Organizations

The worker and work place of today dread meetings. Eric Linsdorff, a world famous conductor, said in response to a prestigious offer to lead a particular orchestra: "No thank you. I would rather go to the dentist than have to sit through all those boring meetings."

Once upon a time, meetings were viewed with anticipation. In the past, meetings were few and far between. Business functions did their work alone and the bosses got together periodically to discuss strategy. The obligatory staff meeting or yearly stockholders meeting were herald, civil events.

Then the work of organizations changed: Complexity, speed to market, technology and globalization, have all made the meeting the heart of the matter in shaping the processes and decision making of an organization. Today's business would stop functioning without meetings. Meetings hold the culture together. Meetings are now the work of leading and managing others to get results. Unfortunately we think of meetings as only dreaded or heralded events. The technology for organizing and facilitating meetings has changed, but we are still stuck in the way it use to be. We haven't shifted our minds or our practices to be aligned with the new reality.

Meetings that Work and Those That Don't

Most meetings have little structure and unclear goals. Most meetings today waste precious time. Meeting conveners do not prepare in advance. There is no process-oriented agenda directed to producing results. If there is an agenda it is based on an outmoded practice of "old business and new business" taken from *Roberts Rules of Order*. Too much time in meetings is spent gathering information that could be done more effectively, in advance. In meetings there is ineffective or no facilitation. The meeting is viewed as an obligatory event rather than a step in an integrated process of communication and culture building.

These meeting shortcomings are serious errors. Preparing for and running a meeting is both an art and a science. You must know what you want from a meeting before you plan it and invite people to it. The invitation must communicate the purpose and outcomes to the people invited. Before the invitation goes out there is much preparation. What do you want from the meeting -- the outcomes? Who must be present (and not present) to achieve what you want? Avoid the "usual suspects" approach to deciding who attends. Instead, carefully select each person for the contribution they will make. Ask the question: do they have power, perspective or knowledge required for this purpose and these outcomes? After defining the outcomes, having the right people with the right skills or authority at a meeting is a vital piece of the planning. Also know what follow-up action you want. Professionals say for every hour of a meeting, three hours of preparation is required.

Those invited need to know in advance, the purpose, outcomes and their role in the meeting. People show up and contribute to well-organized meetings. They will even do homework for such well - planned meetings. They will do follow-up too. A well-planned meeting benefits everyone present.

Consider conducting a meeting audit of the meetings you now go to or run and the meetings you need to be a part of or hold. This paper provides the framework for your meeting audit.

Meetings Fulfill Organizational and Human Needs

Meetings are no longer minor in the scheme of organizational work. Meetings are center stage. Meetings matter because they fulfill today's human and business needs. Meetings are used to --

- Communicate an intention or a decision and or get feed back on the proposed decision. Meetings help the leader avoid group think.
- Make a decision. The literature on groups clearly demonstrates that a group of the right individuals make better decisions than going solo. This is even more critical as the world gets more intricate and faster.
- Bring pieces of the solution together that are distributed in multiple functions so an effective solution can be achieved.
- Developing the collective aim and identity of the group. Cultivating a team ethos in those who normally have a highly individualized place in the hierarchy.
- Collect vital information that must be quickly organized, through conversation, in one collectively developed picture. This could be the need for competitor or market intelligence, or how a product launch is coming along.
- Build the next economy. It is an economy of creativity. Knowledge is the most precious raw material of the business. Knowledge is in the minds of people. Knowledge gets more useful when many minds make it more whole or use it.
- Foster creativity – the use of the mind to make new combinations at work is the most coveted skill the creative economy demands. Creativity flourishes in conversation.
- Build community and the culture of the workplace. The world is full of angst and people want to feel connected more to other people.

Given these kinds of business and human needs, do you know why you convene meetings? Do you know why you attend the meetings you do? What meetings will you walk away from or zap?

Put Diverse Types of Meetings on Your Menu

Organizations need a meeting menu to organize the various meetings it requires to get work done. Some questions to consider in crafting your menu: What kind of meetings do you have? What kind of meetings do you now need? Zap what you don't need! Redesign the menu to include only meetings that are mission critical for you.

Different types of meetings (see the chart below) have different purposes, lengths, time horizons and frequencies. The type of meeting determines when it occurs, how long it runs, and who is present.

Some types of meetings can be combined at one time in one session. Other meetings require separate conversations on a different time horizon and when combined disaster results. For example, one meeting to solve a big urgent production problem, and then right after that discussing strategy doesn't work.

Types of Meetings and Teams and Their Uses

<i>Type of Meeting Or Team</i>	<i>Premise for Existence</i>	<i>Focus of Application</i>	<i>Nature of Discussion</i>	<i>Preferred Time Horizon</i>
<i>Management</i>	Coordination/ Priority Actions Determined and Who Owns Them	Day-to Day Operations	Urgency	Monthly
<i>New Product</i>	Launch New Products	Innovation	Bold, but Practical	1 - 2 Years
<i>Reengineering</i>	Craft New Work Flows	Innovation	Radical, but Focused & Precise	6 - 9 Months
<i>Quality Improvement</i>	Improve Existing Process	Day-to-Day Operations	Data & Details	6 - 9 Months
<i>Strategy</i>	Forge Strategic Vision and Critical Path	Innovation	Reflective and Future Focused	2 - 3 Years
<i>Learning</i>	Integrate Know-How as New Process or New Practice	Innovation	Collaborative	18 Months
<i>Wild Idea</i>	Ideas are Discussed Without Respect to Implementation	Innovation	Philosophical	Ongoing
<i>Customer Service</i>	Deliver Quality Service Based on Customer Needs	Day-to-Day Operations	Upbeat and Attentive	Every Moment of Truth

Why Do You Meet Policy vs. Operations Divergent vs. Convergent Problems

It is useful to know the scope and boundary of each meeting item to be discussed. Too often there is a blurring of intention in the discussion of agenda items. For example, participants are unable to discern the difference between policy and operating problems, and between divergent and convergent problems.

Policy vs. operating problems: Operating problems are those dealing with the execution of the yearly plan and are found within the boundary of currently approved policy. Policy discussions are about new issues outside the realm of current operations. Such discussions often result when realizing that a current policy cannot be used to solve the current operating problem. A policy discussion can also come from suggesting a dramatically new way of working.

Meeting facilitators have to constantly monitor the discussion to determine if the talk is about operations or policy. Further, they must name what they are hearing, especially when an operations discussion subtly shifts to one of policy. In such cases, a decision must be made to bring it back to operations or let it go into the realm of policy. When the discussion shifts, facilitators must name the shift publicly in the group. It is vital to have a clear mind as to the nature of the discussion.

Divergent vs. convergent problems: Most management meetings are better served by focusing on convergent problems -- the ones that can be solved. The more one studies a convergent problem, the greater the focus and clarity. On the other hand, divergent problems are questions of ethics and philosophy. The more one analyzes a divergent problem, the greater the diversity of opinion. Instead of clarity, there is divergence and dissonance .

Although it is difficult to "solve" divergent problems, they are important to discuss, for it is through such discussion that the vitality and point of view of the group is clarified. Divergent problems open up the future for new business opportunities. Divergent problems are often best left for planning retreats and other reflective forums.

The meeting facilitator must "call the question" when a discussion slips from a convergent to a divergent problem that cannot be defined or solved. The shift should be publicly named. Again, the group decides whether to get back to a convergent discussion or stay on the divergent topic.

In Meetings, Do Problem Scoping Before Problem Solving

The world rushes to problem solving. Often there must be a ban on problem solving until the scope is first understood. Problem scoping must be distinguished from problem solving. The main goals of problem scoping are to gather information, discuss challenges, and dissect the preliminary analysis to discern possible directions. Although the options for solutions may be articulated, problem solving is not a part of this process.

The problem-scoping process involves distinct steps:

1. Name the problem.
2. State the adverse impacts of the problem.

3. Gather information and possible root causes of the problem – good data helps with this step.
4. Identify the interrelationship of this problem with other problems – the beginning of a systems approach to problem solving.
5. Identify obstacles in the organization to solutions in general.
6. Clarify what resources are available to solve the problem.
7. Determine the desired outcome, its urgency, and the necessary deadlines for solution (note: these deadlines can be in phases).

After problem scoping do not move quickly to solve the problem. Instead, identify all the currently known related problems at once, and scope them all first. When a group or an individual is grappling with many problems (a likely scenario) the first step is to prioritize all problems in terms of which ones need to be solved first. In order to do this, it is necessary to assess the impact and magnitude of each.

Often, problems are interrelated as a system. Solve one in isolation and the solution creates more problems elsewhere. Thus, problems must be examined and solved together.

Once this has occurred, it is possible to decide how to proceed. Is it worth investing the necessary resources to remedy the situation? The list of priority problems becomes the systems-based operations plan for moving forward with solutions collectively.

If the systems approach meets obstacles it might require a reassessment and redefinition of the problems. This means starting this process over again from the beginning. The last step in the problem-scoping process is to assign accountability and determine "check back points" -- that is, follow up to see if the process has been effective.

“I want To Be Alone” or “People Are Messy”

How often do you hear: “Leave me alone and I’ll get it done.” Yet, today the complexity of tasks demands many minds get involved. It requires meeting in groups. Working with others is often like herding cats. Carl Jung saw differences as always present in a group.

The driver column represents Jung's four psychological functions from which behavior derives.

Driver	Source of Driver	Life Motive	Orientation towards Structure	Dominant Questions
Values (feeling)	Heart	Joy & Love	Organic, Connector	Do I value this?
Logical (thinking)	Mind	Passion	Structure, Design	Is it logical?
Factual (sensing)	Earth	Duty	Procedure, Rules	What are the facts? If it is not broken don't fix it.
Possibilities (intuition)	Sky	Mastery	System, Creator	There must be a better way?

You are not going to change the core personalities of people ala these core differences. At best, you respect the differences and design and facilitate meetings to respect and capitalize on them.

Use Rules of Agreement to Foster Commitment

Rules are what the group agrees to live by when it meets. Rules define the expected behavior of individuals. Rules are the norms of conduct. Rules are enforced. Rules foster commitment and provide a forum for individuals to confront those not living up to the rules. Rules are not imposed. Rules are developed collectively. Rules don't become really real until the boundaries of the application is tested. A rule has to be violated before it becomes useful to foster a group norm.

Some real rules used by groups --

- Show up on time and stay until we are done – no exceptions
- Do your homework -- no homework and don't bother to come
- Listen to each other with full rapture
- Speak your truth, speak from your heart
- Confront each other when it matters for the greater good
- No cell phones answered – every call taken costs you \$100

Every group has to evolve the rules that best fit it. These rules are examples to consider and borrow from. Without clear agreements there is no accountability. Without agreements unhealthy norms of behavior prevail like everyone is late and leaves early.

Use an "Action Agenda"

The action agenda elements --

- Description of the agenda item
- Purpose of the agenda item (e.g., make a decision – see next section for seven purposes)
- Intended outcome of the item (e.g., create a policy statement on "x")
- Who is accountable for the item to lead discussion, prepare in advance or execute the decision
- Length of time for scheduled discussion
- List of background material/homework to do in advance or bring to the meeting – nudges people to prepare

The action agenda format just presented and the sample is adapted from Doyle and Straus, *How to Make Meetings Work*. The agenda should be circulated in advance (no less than three and ten days is most effective).

When Structured Effectively, Meetings Are Called for One Or More Reasons

For each agenda item, state one of the seven reasons:

1. Pass information/collect information
2. Generate ideas --Brainstorm
3. Scope a problem
4. Solve a problem
5. Make a decision
6. Shoot the bull
7. Connect with others – camaraderie to build the culture and build community

If you cannot identify one or more such purposes, there is no reason to hold the meeting. In such cases, stop going to the meeting or remove the meeting from the menu.

Declare Outcomes For Each Agenda Item To Foster A Sense Of Accomplishment

An outcome usually takes the form of a product or a statement of how the situation will be better or different as a result of the effort. The best group process is outcome oriented, shaped by healthy process.

Meetings Require A Predetermined, Fixed Period Of Time

Meeting length varies by purpose. For example, a board meeting that is only information sharing can be done in one hour. A discussion item of substance requires 30 to 45 minutes each. The most effective time necessary to run a business meeting is 1.5 to 2.0 hours. This length provides enough time for information passing, discussion and bonding for culture building. Business meetings that take longer than one and one-half to two hours are ineffective and should be examined for possible improvements in meeting process, preparation or format. Perhaps there are multiple meetings disguised as one! Meetings less than this time are too often all information and no process. If you want commitment to action there has to be a process of engaging others in more than Q and A. What do you most need?

Common practice is to have one meeting to do everything. As noted earlier, it is more effective to have multiple, specifically focused meetings, each with its own agenda. Longer future-oriented meetings are vital for discussing developmental issues, and work sessions are essential for doing strategic planning, thinking through new product development, and identifying workplace culture building enhancements. Such meetings are best done in chunks of half, full or multiple days, based on the intensity of the items to be discussed.

Sample Action Agenda for an Executive Team Meeting

<u>Agenda Item</u>	<u>Purpose</u>	<u>Outcome</u>	<u>Person Accountable</u>	<u>Time</u>	<u>What to Prepare in Advance</u>
1. Where we each are as human beings	Camaraderie	Some bonding	Facilitator	10 min.	Think about where you are in balancing work/family issues
2. Performance data on customer satisfaction	Decision-making	Determine leverage points for change in the system	Ellen Wood	30 min.	Read report and identify your leverage points
3. Customer service index	Problem-scoping	Priority performance areas	Rocky Paluza	45 min.	Read Harvard Business Review article "Balanced Scorecard"
4. Open discussion pressing issues	Problem-scoping	Prioritization of items for next meeting	Facilitator	20 min.	None
5. Meeting evaluation	Problem solving	What worked What didn't work	Facilitator	5 min.	None
6. Set action agenda for next meeting	Problem solving	Create draft agenda	Facilitator	5 min.	None

Other Practices for Getting Great Meetings

Clarify Who Plays What Role

- *Manager(s)*: active participant, does not run the meeting, but maintains authority and accountability where required. At the same time, the manager has to be insightful as to where she lets go of power and encourages others in the group to take charge.
- *Facilitator*: runs the meeting, helps the group focus its energy on tasks. (better to be not the manager)
- *Scribe/Helper*: records basic ideas, actions, ideas in the actual words of the participants. This is more than the traditional note taker. It is someone who captures the essence of the conversation.
- *Group members*: are present because of their distinct contribution to the conversation and determine the course of the meeting's discussion. (omit those who don't contribute)

Do Written follow-up

The follow-up should include a summary of discussion points that cogently distill what happened and articulates the next steps. This summary should not be a verbatim transcript. It should represent both majority and dissenting views. Any task assignments and their due dates should also be restated. The disposition of non-action items should also be noted.

Use a Disposition Checklist for Assigning Accountability for Follow-Up

Too often in meetings, discussion is hearty, but there is no accountability to carry the weight for the next step of implementation. As the discussion of an item is closing, the facilitator must push the members of the meeting to determine the disposition of the item and who will be accountable for the item at hand. The following menu of accountability options requires that every item discussed on the agenda have a home. How will the item be handled?

- Group assembled solves it
- Single manager who owns problem
- Partners who have to work together
- Existing quality team
- Standing committee
- New work team with management approved charter to shape the team's outputs
- Not an issue: eliminated from further action
- Back burner

Once the home for each item is determined, it is recorded in the meeting summary.

Conducting a Meeting Audit

Based on what you have read, consider these over arching questions to be answered in a meeting audit -

- The meetings you now have -- what works and doesn't work?
- What new meetings do you require?

Specific audit questions –

1. Is there a discernable purpose for the meeting? Are you conscious of the business and human needs for more meetings? If not, stop going or redesign it so there is a clear purpose.
2. How much of face-to-face meetings are spent collecting or passing information? If more than 25% of a meeting is spent passing or collecting, then the meeting requires re-design. Information passing and collecting is best done online and in advance.
3. Is your presence or the presence of each person in the room required? Would the meeting be effective if you or any others were absent? (Focus on the know-how, authority and influence required for the meeting to be effective.)
4. What business topics require the involvement of others? Design your customized meeting menu to serve the business and human needs you want served.
5. Are there rules of agreement among the core team members? Or are there adverse norms that produce unhealthy behavior?
6. Do you prepare three hours for every hour of a meeting?
7. If you are the manager or leader, do you have someone else facilitate?
8. Is there a well-prepared agenda that guides the group through the topics for one of these reasons: engage in camaraderie, pass or collect information, scope a problem, solve a problem, make a decision or brainstorm?
9. Follow-up: Do people do what they say they will do after the meeting?

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