How to Run a Meeting

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AND THEN WE'LL SEND THE DRAFT FOR REVIEW . . .

Scott Adams

DEATH by Meeting

A LEADERSHIP FABLE

...about solving the most painful problem in business

PATRICK LENCIONI

BEST-SELLING AUTHOR OF
THE FIVE DYSFUNCTIONS OF A TEAM
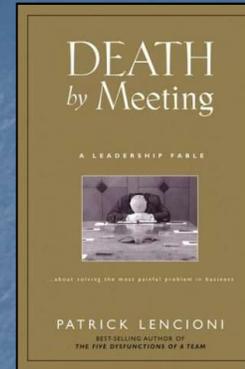
- Over 11 million business meetings are held every day in the U.S.

- Managers spend 30 to 70 percent of their time in meetings.

- Most professionals attend around 62 meetings/month, with > 50% of these perceived as a waste of time.

- A productive meeting of top managers costs thousands of dollars per hour; unproductive meetings cost more

- One successful company banned meetings between 9 a.m. and 4 p.m.; others have a "meeting-free day" each week; others have stand up meetings (don't sit down) . . .

Characteristics of Effective Meetings

- **Purpose and goals are set in advance**
- Appropriate people are attending
- Agenda (with timeframes) is prepared and distributed in advance
- Background information is distributed in advance; participatory assignments are made
- Meeting is actively managed
- Meeting ends with wrap-up, including action items and assignments
- Written minutes are distributed promptly

First and Foremost

- **Is this meeting necessary?**
  - Does it have a purpose or goal? -> if not, skip it
  - Is there an agenda? -> if not, productivity is unlikely
  - Will the appropriate people be present?
    - If not, decisions may be deferred, and it will take time to update key individuals on what they missed
  - Could this be covered by memo or e-mail?
  - <u>Always ask</u>:
    - Is a meeting the best way to handle this?
    - What would be the likely consequences of *not* holding this meeting?

The Top Five Reasons to Hold a Meeting

1. The interaction of opinions is necessary to create an idea, plan or project
2. Group dynamics are essential to the accomplishment of the purpose
3. Time restrictions limit other options
4. The subject is sufficiently complex as to require interaction and explanation
5. The boss/chair/organization says to hold a meeting

Reasons NOT to Have a Meeting

- Because we *always* have monthly meetings
- For informational purposes
- Because people won't read their e-mail

Consider the Basics

Jay, A. Harv Bus Rev 54:43, 1976

- "Many long-established committees are little more than memorials to dead problems."
- "It would save no end of managerial time if every committee had to discuss its own dissolution once a year, and put up a case if it felt it should continue for another 12 months."

6 Main Functions of Meetings

Jay, A. Harv Bus Rev 54:43, 1976

- #1 - The meeting defines the team. Those present belong, those absent do not.
- #2 - The meeting is where the group revises, updates, and adds to what it knows *as a group*.
- #3 - The meeting helps each individual understand the collective aim of the group, and the way in which his/*her* own and others' work can contribute to the group's success.

6 Main Functions of Meetings
Jay, A. Harv Bus Rev 54:43, 1976

- #4 - The meeting creates in all present a commitment to the decisions it makes and the objectives it pursues.
  - [Real opposition to a decision usually consists of 1 part disagreement with the decision, to 9 parts resentment at not having been consulted before the decision.]
- #5 – A meeting may be the only occasion where the group actually exists and works *as a group*, and the supervisor is actually perceived as the leader of the team.

6 Main Functions of Meetings
Jay, A. Harv Bus Rev 54:43, 1976

- #6 – A meeting is a status arena.

"I've called this meeting because it's a big ego trip having the authority to call you all together whenever I want to."

Characteristics of Effective Meetings

- **Appropriate people are attending**
  - If not, important decisions may be deferred, and it will take time to update key individuals on what they missed; reschedule the meeting

Hot Tips

- If there is no agenda circulated in advance, the meeting is likely to be informational and you can skip it
- Ideal time to circulate agenda = 2-3 days in advance

The Agenda is Critical

- Ask for agenda items in advance
- Agenda must include:
  - Topic for discussion
  - Presenter or discussion leader for each topic
  - Time allotment for each topic
- On the agenda, put "Information Only" items and so designate
  - May include time/location of next meeting

Strategies for Leaders
Tom Gilmore and Ellen Schall

- Dilemma: Excessive ratio of *informing* to *using* the information
- Strategies:
  - Put informational and noncontroversial items in a **consent agenda**, circulated in advance; do not discuss unless someone specifically requests same
  - For each agenda item, indicate status (information, action, vote; or "for information, for discussion, for decision")

The Bell Shaped Agenda
Shoop BL, IEEE.

> Purpose of the Bell Shaped Agenda is to structure events around group energy and attention. The first few items help the meeting participants to work as a group on easy items before tackling more difficult items.

Item 1: Welcome
Item 2: Minutes
Item 3: Announcements
- Short, non-controversial
- Example: upcoming events

Item 4: Easy Item
- More than one item may be included in this section, but should not be controversial

The Bell Shaped Agenda

Item 5: Hardest Item
- Why in the middle?
  - Attendance: late comers have arrived and early-leavers have not yet left.
  - Attention is focused on the meeting by now, but not yet concerned with next appointment.

Item 6: For Discussion Only
- Will often be presented as Item 5 (hardest item) at subsequent meeting for vote or decision.

The Bell Shaped Agenda, cont'd

Item 7: Easiest Item
- End of this meeting is the beginning of the next meeting.
- End on positive note of agreement and encouragement.
- Good time for member recognition.

TIP: Never have "Other Business". If people can't supply the agenda item before the meeting, it can't be important – or they are doing it for tactical reasons.

Common Problems and Solutions

Problem

- **Participants don't show up,** *or*
- **Participants show up cold and unprepared to address the issues/topics... it bogs down the meeting.**

Solutions
- Prepare and distribute agenda well in advance
- Distribute background data and information before the meeting
- Make "assignments" to do research and compile data, or even just think about an issue
- This creates "active worriers" ready to participate

Strategies for Leaders
Tom Gilmore and Ellen Schall

- Dilemma: Lack of advance thinking on critical issues
  - Average advance thinking on the circulated agenda is < 1.5 minutes
- Strategies:
  - Give people active and differentiated assignments publicly, in advance, so they know they will have an active role
  - Indicate on agenda the name of the person expected to start each piece of the discussion (creates "active worriers" and incentive to show up)

Getting Started

- Leader should arrive early; make sure the room is arranged, AV equipment ready, handouts present, etc.
- Consider the room arrangement

Meeting Room Arrangements
Shoop BL, IEEE.

- **Theater Style**
  - Leader has great power by position.
  - Participation and interruption by audience is limited.

- **U-Shaped Style**
  - Equality of membership.
  - No doubt of who the leader is.
  - Good visibility for visual aids.
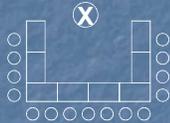
- **Circle Style**
  - Democratic: equality is stressed.
  - Great visibility by participants.
  - Obvious body language.
  - Excellent participation.
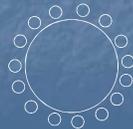
Managing the Meeting

- **START ON TIME**, consistently.
  - Sends the message that time is valuable
  - Do NOT, regardless of the status of a late member, recap the discussion s/he missed; this rewards being late
  - "On-time culture" tricks
- Differentiate those who are responsibly absent (have indicated absence in advance) from those who have just not shown up
- Introduce attendees, if not already known

Getting People Engaged

- Advance assignments
- Consideration of motives of those present
- Have something *interesting and important* on the agenda, which would not be as well communicated by e-mail and will generate incentive to attend

Strategies for Leaders
Tom Gilmore and Ellen Schall

- Dilemma: Weak traditions of representation
- Strategies:
  - Be clear and keep restating representative roles, and expectations of reporting to constituencies
  - Actively inquire how they are reporting back and forth to their constituencies

Strategies for Leaders
Tom Gilmore and Ellen Schall

- <u>Dilemma</u>: Defensive participation (people come to prevent bad things rather than to advance the agenda)
- <u>Strategies</u>:
  - Begin key discussion with a few moments of silence so everyone can collect their thoughts
  - Explicitly pull different people into the conversation
  - Charge people with coming to the meeting with some ideas to kick off the discussion
  - Explicitly invite people to think on both sides of a controversy

Member Roles: The Chair

- Prepare for the meeting.
- Appoint secretary/minute taker if not apparent.
- Conduct and control the meeting:
  - Watch timing or assign someone to this
  - Ensure that all have an equal opportunity to speak
  - Adjudicate when and as necessary
  - Effect compromise on occasion

The Chair, cont'd

- *Close* each item
  - Ensure action is clear
  - By whom and by when
- Check that the minutes are produced accurately and in timely manner

Members in General

- People often react to other people - not to their *ideas.*
- Chair must stress that effectiveness may require disregard for personal or departmental allegiances.
- Self perception: some see themselves as the elder statesman, the joker, or the voice of reason.

Group Building Roles	
The Initiator	Suggests new/different ideas/approaches
The Opinion Giver	States pertinent beliefs about the discussion or others' suggestions
The Elaborator	Builds on suggestions made by others

Members in General – **Supportive**

Maintenance Roles	
The Tension Reliever	Uses humor or calls for a break at appropriate moments
The Compromiser	Willing to yield when necessary for progress
The Clarifier	Offers rationales, probes for meaning, restates problems
The Tester	Raises questions to test if group is ready to come to a decision
The Summarizer	Tries to pull discussion together, reviews progress so far
The Harmonizer	Mediates differences of opinion, reconciles points of view
The Encourager	Praises and supports others in their contributions
The Gate Keeper	Keeps communications open, creates opportunities for participation

Members in General – **Disruptive**

Group Blocking Roles	
The Aggressor	Deflates status of others, disagrees and criticizes
The Blocker	Stubbornly disagrees, cites unrelated material, returns to previous topics
The Withdrawer	Will not participate, private conversations, takes copious personal notes
The Recognition Seeker	Boasts and talks excessively
The Topic Jumper	Continually changes the subject
The Dominator	Tries to take over, asserts authority, manipulates the group
The Special Pleader	Draws attention to own concerns
The Playboy/Girl	Shows off, tells funny stories, nonchalant, cynical
The Self-Confessor	Talks irrelevantly of own feelings and insights
The Devil's Advocate	More devil than advocate!

Based on HC Wedgewood's *Fewer Camels, More Horses: Where Committees Go Wrong*. Personnel, Vol 44, No 4, July-Aug 1967, pp62-87. Quoted in Pearce, Figgens & Golen. Principles of Communication. New York, John Wiley & Sons, 1984, pp. 383-384.

Member Stereotypes

Stereotypes You May Expect to Find in a Group	
The Chatterbox	Talks continually, rarely on the topic, has little to contribute
The Sleeper	Uninterested in the proceedings, some can sleep with eyes open!
The Destroyer	Crushes any and every idea, can always find something wrong
The Rationalist	Makes worthwhile contributions, ideas are well thought-out
The Trapper	Waits for opportune moment to show error has been made – likes to trap the Chair
The Know-All	Tries to monopolize, but can have good ideas
The Thinker	Shy and slow to come forward, but is a great asset

Based on Sadler and Tucker. Common Ground. South Melbourne, Macmillan, 1981. pg. 82.

How to Deal with Disruptive Members

- Make sure that <u>all</u> meeting participants understand their responsibilities.
  - All members were invited to the meeting for a reason
  - All members should feel free to contribute

How to Deal with Disruptive Members

- Members who are silent
  - Begin meetings by engaging every member of the group
    - "Bill, haven't you done this in your work? What was your experience?"
    - "Janet, you've been rather quiet to this point, do you have an opinion or an idea?"
  - Consider breaking larger group into smaller groups to develop input

How to Deal with Disruptive Members

- Members who are vocally dominant
  - Redirect discussion to other members
    "We all recognize your expertise in this area, but let's hear from some others in case some new ideas emerge."
    "John has made his opinion clear; does anyone else have something they would like to add?"
- Members who are negative
  - Probe the negativity to validate concerns
  - Redirect discussion to other members
  - If behavior persists, consider speaking off-line or excluding them from future meetings
    "Let's not shoot down this idea prematurely; let's give it some time for evaluation."

Handling Interruptions

- Identify feelings
  - 'You are really excited about this… and now we need to move along
- Parking Lot
  - Park all issues raised and address them after…
- Redirect comments
  - 'I'd like to discuss this further with you at break'
- Close down discussion
  - 'Not pertaining to the subject at this time…'

The Leader's Duties
Jay, A. Harv Bus Rev 54:43, 1976

- Control the garrulous
- Draw out the silent (whether diffident or hostile)
- Protect the weak
- Encourage the clash of ideas
- Watch out for the suggestion-squashing reflex (suggestions are easy to ridicule)
- Come to the most senior people last
- Close on a note of achievement

So what can I do?
Use your best smile and assertive skills for:

- Leaders without a plan -> offer to develop the meeting agenda
  - *"Why not let me put together an agenda so you can concentrate on content?"*
- Leaders who let things get off track -> ask how the discussion relates to the agenda item at hand
  - *"We were talking about ____, I'm not sure if I see the connection."*

So what can I do?
Use your best smile and assertive skills for:

- Leaders who don't control rambling -> gently reference agenda time frames
  - *"This is all interesting, but to stick with our agenda, we'll have to wrap up soon."*
- Leaders without follow-up plans -> offer to take short minutes
  - *"I'm taking notes anyway, so I'd be happy to make them minutes."*

So what can I do?
Use your best smile and assertive skills for:

- Leaders who run over time -> suggest that some items be worked on outside of the meeting
  - *"How would everyone feel if we worked on team goals in individual groups then came back to discuss them next week?"*

Ending the Meeting

- Spend 5-10 minutes summarizing key decisions/next steps
- Invite a volunteer to fill in absent members so they will be up to speed, and also feel their absence was noted and their presence/thinking is valued
- **End on time**
  - Shows respect for attendees
  - Nobody ever complains about ending on time
  - Try meeting just before lunch or before end of day

Common Problems and Solutions

Problem

- **Nothing that we agreed to do in the meeting ever "gets done".**

Solutions

- Promptly prepare and distribute the Meeting Report (minutes) with highlighted action items
- Be sure each action item is clearly tasked (who, what, and by when)
- Monitor activities, progress and issue reminders
- Re-assign incomplete tasks to "doers"

The Importance of Minutes

- How essential was the meeting if it's not worth recording?
- Minutes will bring non-attendees up to speed, and remind attendees of directions taken
- Good way to remind people of their assignments (action items)
- Marking attendees (and those excused and/or absent) is a gentle nudge
- Include time/location of next meeting

Minutes vs. Action Notes

- **Action Notes** may be more effective than minutes (or good supplement to same)
  - Can and should be distributed promptly
  - Used to highlight future action rather than past debate
  - Don't record all the narrative, but record decisions and action items/tasks

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