

How to hold effective meetings

Everyone in business has been in an ineffective meeting. One where no decisions were made, there was no agenda, people were not prepared and the meeting didn't start or finish on time, people didn't follow the agenda, there were no notes or minutes or they were inaccurate, or you were invited and there was no need for me to attend. Should the meeting have ever been called, and was there an obligation to hold the meeting because a project exists and status needs to be determined. Are you too busy attending meetings to do any productive work or is this being left to the late hours or weekends? Have you countered the ratio of productive and non-productive meetings, and have you done anything to reduce the number of non-productive meetings you attend (this does not mean sending a delegate). Meetings have incorrectly and automatically become associated with signs of progress. How many meetings have been challenged in terms of people asking why they exist, and why can't the agenda items be covered off at other meetings?

There is no magical formula for running really effective meetings. It often comes down to people, their personalities, their drive and motivations. This article outlines some of the tools and techniques that are used to help people develop their mastery of running effective meetings, and is not meant to be comprehensive, but a guide to help get people thinking. What works for one team or organisation may not work for every team, so there is an element of discovery involved in getting the right mix of ingredients. As this is a people driven process, soft skills come into play, and the dynamics of teams and organisations also play a part in the formula of success. You will need to keep tweaking and adjusting the tools and techniques, as if you were maintaining a classic car, with a lot of love and attention to keep it running. When you get it right, it feels great, but beware because team and personality changes can make the wheel fall off your wagon.

BASIC INTRODUCTION & THEORY

Meetings need habits and good practices in order to become effective tools to get work done. The basic prescriptive formulae outlined on main websites and in management books means it is fairly simple to get to an 80% solution, however it needs practice, discipline and dedication to deliver the right outputs:

- **Meeting Schedule** – Everyone in the business should know about regular meetings, who chairs them, what they generally discuss and where and when they are held;
- **Agenda** – Obtain a written agenda with a clear objective in advance because vague intentions never deliver;
- **Attendee List** – Review the list to ensure the decision makers are coming, review numbers regularly. Make sure that people coming are able to make decisions, have inputs and something to say, are there to escalate or resolve escalations, or are there in an administration function. Business doesn't have the luxury of people attending meetings in the capacity of being passive observers, becoming distractors or wasting other people's time;
- **Manage by the Clock** – Maintains focus in an effective meeting; Remember time is money, so start on time and either end on time or a few minutes earlier; Don't schedule meetings longer than 60 minutes as attention wanders;
- **Parking Lots** – A great way to manage off topic discussions, but need to make sure that they are followed through with the next steps, whilst also showing their importance to someone that their contributions are of value;
- **Prewire Important Points & Discussions** – Communicate sensitive items 1to1 before the meeting occurs – avoids time consuming initial discussions and increases chance of success;

- **Take Notes Yourself** – Record any questions, assignments, actions and turn into bullet points to be distributed later or check the minutes of the meeting;
- **Closing the Meeting** – Follow a process that wraps up the decisions, actions, AOB and remember to come to the most senior people last;
- **Meeting Minutes** – A summary of what was discussed, notes of achievement, date of next meeting (if needed), and make sure every one of the attendees gets a copy and also post an electronic version in a file-share that most people can intuitively get to;
- **Follow-up Meeting** – Do in a timely basis to manage stress, make a good impression, manage actions until they reach a resolution (so many actions never get completed).

You must not forget other factors enablers and tools such as:

- **Background Information** – If people are provided with the agenda and background material in a timely fashion, it can be used to get everyone up to speed;
- **Templates** – Regular meetings work well if templates are used, to save time completing;
- **Actions Need STARTOS** – All actions need a Scope (What), Timescale to deliver (When), Actionee (Who), Resources to do it, Target End-state, Owner and Sign-off Person, in order to be effective;
- **Not for Sharing** – They are not the best place to share information, making new requests or debating, ad-hoc decision making or point proving. Effective meetings need promises and requests (being made and fulfilled);
- **More can hinder** – More people at meetings can slow things down due to sheer number of viewpoints and can slow things down if everyone is expected to say something/anything;
- **The Timekeeper** – a critical role that helps keep everyone to the agenda;
- **Back to back meetings** – don't expect the meeting to start exactly on time, if you are organising meetings back to back; it takes time to walk between meetings.
- **Meeting Etiquette** – Does everyone have a list of the do's and don't of meeting behaviours? If people don't appreciate the ground rules, how can they be expected to follow them? Were people brief and concise? Did the chairperson manage the meeting and stop side conversations and comments? Did people challenge ideas and not people? Did people come prepared and bring paper and pens? Was there disagreement without being disagreeable, and did everyone come out of the meeting with a unified way forward? Was a summary of events and actions presented at the end of the meeting? Did we achieve our stated aim? Did we stick to the agenda? What went well? What shall we do differently next time? Try not to go back and re-brief late entrants – if they are late they are late, and consider briefing them after the meeting – this is a huge waste of time for the attendees and sends the wrong message to late attendees (it is OK to be late);
- **Focus on Decisions and Further Investigations** – These are the key reason you are there;
- **Follow-up Email or Call** – Very useful method to provide status updates of actions. Needs to happen within 24 hours of the end of the meeting, in order to keep attention and focus so people don't forget or get distracted.

MORE ADVANCED TOOLS & TECHNIQUES THAT REQUIRE MORE EFFORT, PLANNING & THINKING

Increasingly meetings take more and more of our business day and have been identified as a major productivity killer after dealing with office politics. What can you do to make meetings even more productive and start to hit on the door of a 95% solution?

- **Cull the Attendees** – If you really want to make progress, think about limiting the audience to the absolute minimum or critical quorum (only those absolutely necessary and leave out those who are not required to be there), and involve everyone irrespective of different behaviours because full value is drawn by bring together everyone contribution;
- **You or Your Delegate Authority** – Make it clear that the attendee appears in person, or they send an appropriately qualified, read-in and authorised person to make decisions on their behalf;
- **Good Relationships** – Creating working environments where everyone works together for the common good in order to deliver productive meeting outcomes that value each other's contributions;
- **5 Minutes Early** – Try arriving early to get you head into the zone before the meeting starts;
- **Red Cards** – Issue everyone with a Red Card, that they are allowed to raise if someone is either not following meeting etiquette or going off topic – nobody likes to be red carded;
- **End on Time** – Think of others and give them the courtesy of getting to their next meeting on time;
- **No Phones** - Don't take the phone to meetings? Get people to turn them off at the start.
- **Grade the Meeting** – Issue everyone with a feedback form, which they complete anonymously and they say what went well in the meeting and what didn't. Was the meeting essential and did it get the required results? Did it follow the agenda and finish on time? Make sure all the feedback goes back to the chairperson. If you want to be really radical, post the results up on the board for everyone can see, so they can see the ineffective meetings so management can take action;
- **Stand-up Meetings** – A great way to speed things along, but beware that people can have difficulty taking notes in the standing position and don't keep people standing too long, otherwise they start to loose interest;
- **Remote Meetings** – These need a subtle different approach and an awareness that the lack of face to face engagement needs to be compensated for with good IT, as well as dealing with the cultural, language, body language and time differences. Try not to make the meetings more difficult, highly inconvenient or embarrassing for attendees, by thinking through the changes you may need to make to help facilitate good communications in such circumstances;
- **In front of the Visual Display Board (VDB)** – Another way to see how things are happening when everyone crowds around the whole issue which is layout on a board in front of them. Status meeting work well when you have all the inform in front of you, and you write the new actions on the board in front of the whole team as they happen;
- **Don't allow electronic devices** – Make it a no 'bring your own IT event' to stop the distractions of people looking at their emails or texting and not focusing on the issue at hand;
- **The 5, 15, 30 or 45 minute Meeting** – Have you ever tried to cover the agenda in less than 1 hour? Just because traditionally meetings are typically 1 hour, why can't you do some continuous improvements and cover the essentials in less than 1 hour?
- **Action Trackers** – Is there a common format or tool where all the actions are fed into so people can track their resolution?
- **Done and Done Done** – Just because the actionee things the action is done, is it really done? Too many actions are partially completed, meaning they come back with a vengeance later and require even more effort and resources next time around;
- **Is it an Action or is it an Accident** – Just because an action is raised, does it really need to be done? Does it need to consume valuable business resources at the expense of other activities? What is the priority of it against other activities? Is it being assigned to the right

person to do or has it just been assigned to a worm body person and is an accident waiting to happen? Don't be afraid to challenge actions, ask what the tangible output will be and where it will contribute the positive outcomes or reduce negativity effects;

- **Best & Poorest Meeting Award** – A company award scheme where people vote for the best and worst meeting that they have attended over the last month. The winner and loser then have to display to trophy of shine and the trophy of shame on their desk for the next month;
- **Meeting Facilitators** – Do you have trained people within your organisation, who can sit in on meetings as facilitators, in order to allow the other attendees to concentrate on the decisions and actions? This can be a useful construct, as the Meeting Facilitator does not get distracted by the specifics of the issues and can provide a different perspective;
- **The Spare Person** – When you have a meeting do you periodically invite any of the following people? New starts to show them what happens at specific meetings? Young people who you want to develop and give them new opportunities? The lay-person who is totally independent and can provide answers about does it all makes common sense, and can ask the very silly questions (why are you doing that for example) without incrimination or negative feedback? Have you ever swapping team members between meetings to see what new information or technique they can identify that can then be applied to your meetings? When did you involve other people involved in your team or supporting your team from other functional areas in your meetings?
- **Rotating the Chair Person Role** – When was the last time you rotated the chair person role, or any other role in the meeting (Secretary, Time Keeper, Minute Taker)?
- **Value Add** – Key to making sure you get the best value from meetings is when you have an understanding of the value of the meeting in the holistic working practices of the organisation, how you can articulate this to others and making sure you use what has happened in the past to help you learn and improve going forward. Doing a periodic reflection and deep dive to answer this questions, helps keep the meeting fresh and exciting;
- **Planning Ahead** – How well do you do this? Has it become a habit yet? Has it reduced your workload and improved the meeting effectiveness?
- **Capture Lessons Learnt** – There are probably a number of lessons learnt that get discussed at meetings, so who is capturing them and adding them to the corporate knowledge?
- **Attending External Meetings** – What have you learnt, captured and applied from attending meetings with your customers, suppliers, competitors or from other sectors?
- **Other Ways** – Are there tools you can employ to limit the number of meetings that people attend. P&G have eliminated 18-24 days of meetings per person per annum using a tool called 'QuickBase';
- **Metricating Meetings** – Do you have meetings KPIs and how are you doing against your baseline and against other groups within your organisation? If you don't measure it, how can you ever improve it.

THE LENSE OF REALITY

You need to run your meetings as you would have others run their meeting you attend. There can't be rule for one set of the organisation and other rules for another set. If you are going to run meetings, they all need to follow the same high standard, and people must be able to say if other people are falling short. There shouldn't be a blame culture, however people not living up to the company standards, should have their names put forward to a 'meeting re-education'.

Meetings have traditionally been run very badly, in poor venues without a major shakeup happening for decades. David Pearl (Author of 'Will there be donuts – Better Business – One Meeting at a Time) puts his consultant head on and offers 10 insights that people should take very seriously:

- Consider every meeting as my meeting;
- Have less unproductive meetings and more productive meetings;
- Make sure everyone understands and practices the 7 basic reasons to meet;
- If you don't know why you are in a meeting, question whether you need to be there next time;
- If you can't improve a bad meeting, make it worse or make it stop;
- When you are done, stop;
- If no one else is leading the meeting, then you should take the lead;
- Understand the reasons for a bad or 'nearly' meeting and avoid them;
- Make sure you create value for all those people involved;
- Do not be bored anymore, you have a choice now.

You have a choice. You can keep going to the non-productive meetings or you can start making a stand. You can be the catalyst that can improve meetings within your company, make them more interesting, exciting and dynamic. As a result, you will probably make your organisation more efficient, more effective and more productive. It is from the seeds of acorns that huge oaks grow.

THE WHAT IF THOUGHT PIECE

This is the region where we start to explore the last 5% (what the Five Percenters will do in order to start approaching an optimal state, remembering that optimal states are often transient phases and no one solution will work all the time) where you need to look at what you are doing, tailor it to your organisation and culture, keeping reviewing, assessing, improving and moving forward. Typical things that you may want to consider if you are in this region include:

- **Positive Round Up** – Set the tone by going around the table and getting people to talk about some positive (a recent accomplishment, person they helped since the last meeting, something they are looking forward to, funniest thing they have been told, or something learnt since the last meeting);
- **Evaluation** - Evaluating meetings, frequency and removing the un-necessary or the meetings not producing the required outputs;
- **Interrupt Flow** – Sometimes you need to interrupt the flow of the meeting in order to keep people focused, make it fun and relaxed, give people breaks or get them to stretch;
- **Get rid of the table** – Get people to sit in a circle or sit in an ad-hoc manner, get them to regularly move around, allow people to stand and walk about;
- **Strategic Silences** – The purpose of meetings is to arrive at solutions, to create ideas and make decisions, it is not about talking all the time or watching presentations. A well placed 2 minute silence to allow people to think deeper, reflect and focus can be quite inspiring;
- **Automating Workflows** - Automating some of the decision making processes can help to reduce the numbers of meetings that people need to attend, however this must be conducted within the context of the overall business environment and not done in isolation;
- **One Size Does Not Fit All** - Recognising that different types of meeting need different types of approaches, techniques, chairmen personalities and types of attendees. Meetings need to be tailored to facilitate the required outputs and audiences. A meeting with lots of high level

management attending needs to be handled differently to a weekly team meeting. Do you have different structures, templates and rules for each of the different types of meetings?

- **Tuckerman Model** – Bruce Tuckerman outlined the Forming-Storming-Norming-Performing Model in 1965, adding Adjourning in the 1970's, showing the different stages of group development and how teams can go back steps with the introduction of new team members or when projects enter different phases. Something that you should always have an eye on;
- **Data Exploitation** - Extracting every single morsel of information out of the group. Discussions at meetings can highlight risks, opportunities, issues relating to delivery, performance, output and outcomes. Don't waste the chance to capture every bit of data and information that may not be of use today, but may be of value in the future;
- **Build in Preparedness** - Elon Musk demands his people be super prepared. Are yours? Do you give them the time to become super prepared?
- **Build in Accountability** – Are people delivering in their promises?
- **Build in Stretch** – Do we understand the meaning of creating stretch targets for actions?
- **Share Data** - Need to share all relevant data, ideally in advance, if not in advance using easy to understand charts, metrics and infographics;
- **Different Acronyms, Terms and Taxonomies** – When dealing with different organisations, sectors or countries, it is useful to have an agreed list of acronyms, terms and taxonomies, so everyone knows what everyone means, otherwise you could be open to interpretation, misunderstanding may occur and communication/relationships can ultimately break down. It is also useful to have such a list to help your new starters or new people from other parts of your organisation get up to speed;
- **Training** - Have you trained your Meeting Leaders in terms of Following the Process, Encouraging Participation, Clarifying Issues, Capturing ideas, Recording Decisions, Keeping Time, Controlling Discussions, Diffusing Conflicts, Building Consensus and Limiting Distractions? Have a periodic fun 'meeting re-education' session, where anyone who has been nominated for not upholding company standards need to deliver a piece of the session (i.e. what they did wrong and how they corrected it in the future, bring a best practice from another area or how not to fall into the common bear traps);
- **PMO SME** – Do you have a Project/Programme Management Office (PMO) Subject Matter Expert (SME) on running meetings, giving people advice and guidance, whilst also offering to assess their meetings and make recommendations for improvements?
- **Practice** – When was the last time you had a practice session on running meetings?
- **Time Segmenting** – The art of dividing a meeting up into segments and getting the required audience to attend only their relevant part of the meeting, rather than the whole meeting. It takes a lot of administration and time management to achieve, but it can be very productive, especially if used in conjunction with text messages (i.e. your segment will start in 5 minutes) giving people time to get to the meeting on time;
- **Do something different** – Have you tried a game-storming technique at the start of a meeting to get everyone focused and thinking? Have you run a truly creative meeting and do you know what to do to facilitate one? Have you ever run a truly positive fun meeting that everyone still talks about?
- **Dealing with Difficult Situation** – Have you trained your people to deal with difficult situations, whether it is taking command of over zealous attendees who are hogging the limelight, negotiating difficult contracts with suppliers or customers, handling difficult or sensitive conversations, challenging our perceived assumptions, when people lose sight of the goals, when there is not enough respect to conversations and things get personal, or we try

and oversimplify the problem space? This is something your advanced practitioners should be well versed in dealing with;

- **Doing a Reflection** – Mindfulness teaches us the quality or state of being conscious or aware of something, whilst calmly acknowledging and accepting one’s feelings, thoughts and bodily sensations. It can be used to help undertake reflection thinking of what went well, what didn’t go so well, and what should be done differently. Paying attention and watching the world around you in a non-judgemental way allows us to focus the mind, boosts concentration and can help improve productivity;
- **Review the Record of Decisions** – Has anyone done a review of the record of decisions that have come out of meetings to see how effective they are, are they scratching the itch and delivering the right outputs and outcomes?
- **Annual Survey** – Get the staff to have their say on the best meetings they have attended during the year, so people start to get to know ‘what good and very good look like’;
- **Independent Assessment** – Get someone in from outside your area or company, to help you to find out what works well (need to keep, retain or improve), what doesn’t work so well (need to fix, patch or get better, re-assessed, investigated, tested, proved) and what will never work (needs to be stopped, removed or limited in its use and application to specific agreed scenarios);

MORE SELF LEARNING OPPORTUNITIES

Want to read more on this subject, then try:

1. <https://hbr.org/1976/03/how-to-run-a-meeting>
2. http://gretchenrubin.com/happiness_project/2011/01/14-tips-for-holding-a-productive-meeting/
3. <http://blog.johnspence.com/2010/08/some-tips-on-holding-successful-remote-meetings/>
4. <http://www.realmeetings.net/>

SO WHAT ARE YOU GOING TO DO NEXT?

The above article gives you a number of ideas of how to start making your meetings more effective. If all you do is read the article and do nothing, then that is another waste of time. Why not try and outline 5 things you are going to do from either the list of 70+ items mentioned above or derivatives of the list, and then see what happens.

#	Today(Date), I am going to.....(What) by(When)	In order to(Why) and then I am going to review the results, outputs and outcomes (Where & When)
1		
2		
3		
4		
5		

THE ACTION TABLE -> For Effective Meetings

SUBSCRIPTION SERVICES

Please request this information from Innov8or Solutions Ltd directly. These are subscription based services and will depend on the scope, location, duration and type of skillset selected. Please request additional information and prices.

EFFECTIVE MEETING TEMPLATES

A selection of handy templates, guides and reference materials that your people can use and refer to on a day to day basis.

EVALUATE YOUR MEETINGS SERVICES

We can come to your offices, and undertake independent critical evaluations of your meetings and provide feedback with recommendations. We can tailor the effective meeting templates to meet your needs as part of this process, and will leave you with a very powerful toolkit when we leave.

EFFECTIVE MEETING TRAINING

Get the most from your meetings with our tailored effective meeting training modules. Your meetings will never be the same. This is an opportunity for us to train your trainers, and establish and embed a core set of knowledge and best practices into your organisation.

ADVANCED MEETING FACILITATION

Want to get real value from your kick-off, brainstorming, tiger team, bidding or other very specific task orientated meeting, then bring us in to help you plan the event, facilitators for day and assistance analysing and providing you options from the output of the day. Let your people do all the creative stuff and let us take the administration burden and help manage the meetings using best practices and proven techniques.

EXPERT MEETING NEGOTIATION, FACILITATION &

This is a tailored service where we bring in a team of people considered best in class in terms of meeting negotiators, facilitators, communicators and conflict management experts, to help you deal with customers, negotiate the best options with suppliers or help resolve issues. This service does not include any lawyers, financial or commercial expertise as this will be specific to your sector, domain and business.