
QUICK GUIDE TO EFFECTIVE MEETINGS

MEETING PLANNING

QUESTIONS TO ASK BEFORE MEETING:

1. What is the purpose of the meeting?
2. What are the desired outcomes?
3. Is a meeting really necessary to achieve the purpose and outcomes?
4. What alternatives exist to meeting?
5. Who should attend the meeting?
6. What is the chemistry of the invitees?
7. What is the meeting plan?
8. What unexpected issues might arise?

Creating a POP: Purpose, Outcomes, Plan
 The purpose should state why a meeting is needed. Write one by finishing this sentence.
 “The purpose of the meeting is to

Outcomes focus the meeting by indicating what information is to be shared and what decisions or actions need to occur.

The plan is the actual agenda that accounts for the leaders, content, sharing, processing, and timing of the meeting.

ACTIVE FACILITATION STRATEGIES

Set ground rules to create a team contract of how people will behave. It keeps the meeting focused. Example:

- ⇒ All participate.
- ⇒ Challenge ideas instead of individuals.
- ⇒ Start on time/Stop on time (SOT/SOT).
- ⇒ One conversation at a time.
- ⇒ Confidentiality.
- ⇒ Evaluate the meeting.

Appoint roles to formally share meeting ownership. Examples:

- Facilitator: Objectively leads meeting.
- Cofacilitators: Support facilitator.
- Scribe: Notes actions/decisions on flip chart.
- Note Taker: Records decisions/actions, shares.
- Process Observer: Ongoing/postevaluation.
- Timekeeper: Monitors time, focuses group.
- Others: Designated by group as needed.

The parking lot is a visible space to scribe items that are important, but not relevant to the issue at hand. The Parking Lot is analogous to a car in the parking lot. It is important for moving to the next destination, but irrelevant to the moment at hand (or immediate meeting’s purpose). Designate a scribe and note issues on a flip chart.

Involve participants at the start by spending a few minutes checking in. This invaluable communication period sets the tone for the entire meeting. Try:

- ⇒ 5-minute informal conversation period.
- ⇒ Paired interviews on predetermined topics.
- ⇒ Roundtable sharing of business concerns & good news.

Premeeting assignments are tasks done by participants in advance of the meeting. If you assign them, abide by these rules:

- ⇒ Explain why it is important.
- ⇒ Give adequate lead time.
- ⇒ Provide clear instructions (read, analyze...).
- ⇒ Emphasize need to complete it in advance.
- ⇒ Assign it only if you intend to use it.
- ⇒ Plan a process for using assignment at meeting.

Presentations can be time wasters if they are not planned and facilitated well. Follow these ground rules to ensure quality and critical thinking:

- ⇒ Separate presentation from discussion.
- ⇒ Allow clarification questions only during presentation.
- ⇒ Give participants reflection questions:
 What points did you agree/disagree with?
 How could the proposal be improved?
 What new questions does it raise?

ACTIVE FACILITATION STRATEGIES (cont.)

<p>Meeting breakouts work for 10 or more participants and are effective at reducing meeting cycle time and maximizing results.</p> <ul style="list-style-type: none"> ⇒ Determine space requirements. ⇒ Decide size of breakout teams. ⇒ Plan composition of breakout team. ⇒ Determine supplies/materials needed. ⇒ Plan breakout team process. 	<p>Breakout team process options:</p> <ul style="list-style-type: none"> ⇒ Buzz teams. ⇒ Small teams on same task; report outs. ⇒ Small teams on varied tasks; report outs. ⇒ Focused, short report outs. ⇒ Time for silent reflection. ⇒ Process for action on team information. ⇒ Process for making decisions.
<p>Flip charts are invaluable for:</p> <ul style="list-style-type: none"> ⇒ Keeping meeting focused. ⇒ Freeing participants from notetaking. ⇒ Catching up latecomers. ⇒ Depersonalizing ideas. ⇒ Helping notetaker. ⇒ Retaining the process visually & emotionally. <p>Get some colored markers and a scribe, and you are ready to create a meeting mind map!</p>	<p>Flip charting tips:</p> <ul style="list-style-type: none"> ⇒ Write the words that people say if possible. ⇒ Share scribe role among multiple members. ⇒ Keep all information visible (hang charts). ⇒ Clarify with team when you add your ideas. ⇒ Seek permission to paraphrase ideas. ⇒ Establish and use a Parking Lot. ⇒ Use color. ⇒ Print clearly.

TROUBLESHOOTING

<p>Helping Behaviors</p> <p>Proposing “How about ...”</p> <p>Building “To build on Diane’s idea ...”</p> <p>Information Seeking “Please describe ...”</p> <p>Opinion Seeking “How do you feel, Kenny?”</p> <p>Information Giving “Here is my report ...”</p> <p>Opinion Giving “My opinion is ...”</p> <p>Disagreeing “I disagree with Ron because ...”</p> <p>Summarizing “To recap the issue ...”</p> <p>Testing Comprehension “I heard you say ...”</p> <p>Consensus Testing “How many agree?”</p> <p>Encouraging “Say more about that idea ...”</p> <p>Harmonizing “What do we agree on?”</p> <p>Performance Checking “How close are we?”</p> <p>Standard Setting “We need to decide by ...”</p> <p>Tension Relieving “The humor in this is ...”</p> <p>Paraphrasing “What I heard you say was ...”</p>	<p>Processing Conflict</p> <p>Acknowledge feelings. Feelings cannot realistically be left outside the meeting. Get them into the open. Remain neutral. Respect people’s right to have their feelings and encourage expression.</p> <p>Seek first to understand, then to be understood. Model and expect this behavior.</p> <p>Process feelings by:</p> <ul style="list-style-type: none"> • Observing silence (reflection time). • Taking a break. • Silently brainstorming issues on cards. • Round-robin sharing of concerns. • Buzz team discussion and sharing. • Identifying areas of conflict and commonality and ideas for bridging gaps. • Suggesting ways of resolving conflict. <p>Refocus conversation on original topic/goals.</p>
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TROUBLESHOOTING (cont.)

Hurtful Behaviors and Strategies

Late Arrivers Start on time, don't update.
 Side Conversations Stop, look at offenders.
 Ask them if they would like to share their idea.
 Dominators Ask them to scribe; use ground rules; seek input from all participants.
 Quiet Members Periodically draw them in without putting them on the spot.
 Rambling Stay focused on agenda, use Parking Lot if point is relevant.
 Negativity Ask group to comment on negative checks).
 opinions. Check for agreement/disagreement.

Dealing with Unruly Behavior

- Establish ground rules before problems occur. Refer to them often.
- Confront unruly behavior.
- Expect all participants to share responsibility for meeting process.
- Communicate nonverbally.
- Recognize helpful behavior.
- Meet privately with repeat offenders.
- Create group signals for confronting behavior (3-knock rule, Koosh balls, periodic process

Consensus Building

Consensus is a psychological state of supporting an action for decision that the group decides to pursue.
 Formula: C=A+S (Consensus=Agreement+Support)
 Test for consensus by verbal polling or a written vote.
 Use consensus to determine team functions (meeting frequency, ground rules, roles, etc.); agree on team projects; agree on key implementation points of projects.
 Recipe for consensus:
 I've heard and understand your position.
You've heard and understand my position.
 The decision does not compromise my values or ethics.
 I can support the proposed decision.

Recognize Symptoms of Conflict

- Ideas get attacked before they are fully stated.
- Comments are personal attacks.
- Suggestions don't build on previous ones.
- Win-lose pressures.
- Victim mentality (versus proactive).
- Members take sides.

Act to Resolve Conflict

- Recognize that conflict is a natural, inevitable aspect of team process.
- Mutually agree resolution is desirable.
- Empathize with each other.
- Move from problem identification to solution.
- Seek a variety of opinions on issue.
- Listen.

REFLECTIVE EVALUATION

Seek closure by summarizing and generating conclusions and/or action items throughout the meeting. Record them on a flip chart. This makes reaching conclusions and minute writing easier.
 Reflect on:
 What actions have been decided?
 What decisions have been made?
 What are agenda items for next time?
 What issues remain open?

Post Mortem The only way to improve meetings is to strengthen what works and eliminate or change what doesn't.
 Here are a few ideas:
 Take action on Parking Lot items at end.
 Review outcomes, decisions, and actions.
 Highlight items for next agenda.
 Critique session: Open conversation, written survey, combination.