

In Pursuit of Effective Meetings

by Soren Eilertsen, Ph.D.

Since many managers spend more than half their working time in meetings and since “time” is one of the most important organizational assets, it ought to be spent wisely. This article discusses the basic need for processes and techniques to manage meetings.

Introduction

Almost every week we have someone tell us that their organization wastes too much time in too many meetings and in ineffective meetings. Since many managers spend more than half their working time in meetings and since “time” is one of the most important organizational assets, it ought to be spent wisely. Meeting management is not a complex practice so why is it so hard to make meetings effective. In this article, we discuss this issue as well as the basic need for processes and techniques to manage meetings.

When we complain about the traffic or the weather, we do not expect it to change. In a similar manner, it appears that when people we meet within organizations complain about too many and too long meetings, they do not expect it to change. People feel powerless about this situation. At the same time, meetings are more important than ever in today’s knowledge organizations, where both complexity and need for quick action are growing. This is both an individual and an organizational issue.

Do we really spend too much of our time within the organization in meetings or do we have more fundamental problems with our attitude towards meetings? Our quick answer to this question is that most organizations spend too little time in the right type of meetings and too much time in the wrong meetings. Few organizations have taken the time to establish priorities and ground rules; fewer invest resources in effective meeting preparation and conduct training.

In observing meetings we find that, many could be cut to half the time or less if, the organization implemented meeting standards and trained their people. At the same time we also experience organizations being hesitant to meet often enough on important issues due to a perceived notions that too many or too frequent meetings are unproductive. Knowledge work within organizations requires constant dialog and thus meetings are an essential medium to reach consensus and common understanding. In fact, certain work should take place entirely in meetings. As business complexity continues to rise, the need for meetings will rise.

Meeting management is a required discipline since people do not necessarily behave in the interest of the group just because they are in a meeting together. Meetings do not turn attendees into a team with a shared mission and the ability to let go of egos in the service of the team. On the contrary, our culture celebrates adversity and we see a lot of misplaced debates in meetings.

Conducting Effective Meetings

The fundamentals of meeting management have not changed over the past decades but a few new practices have emerged that can make meetings more effective, such as:

- Virtual Meetings – using the phone, video, and web technology eliminates the need for all attendees to be in the same location. This saves greatly on travel time and expense. Especially the web technology and the use of shared meeting space for presentation, idea

generation and note taking shows great promise for increasing the effectiveness of meetings.

- Digital Technology – when used appropriately, projecting digitized content can enhance a presentation. We also find many uses for capturing meeting outcomes using digital projection, whiteboards or cameras, whether this is in the form of notes, decisions, designs, solutions, and/or action plans.

In our work, we often end up in situations where we bridge the business and technology sides of the business. Engineers and information technologists have a more difficult time with meetings than most people in the type of organizations we work with. I asked my consulting colleague, Paul Glen, the author of "Leading Geeks: How to Manage and Lead People Who Deliver Technology" why this is. "One reason is that technical people tend to be more introverted than the general population. Geeks don't experience meetings as the joyous bonding time that sales people do. Those who are drawn to technical work tend to enjoy solo time more than average. The other reason is that we tend to think of productive time only being that which is spent directly on creating product, whether it's code, plans, or documentation. We fail to recognize that legitimate work extends far beyond the keyboard. With today's technical tools, it's often harder to figure out what to do than to actually do it. A big part of our work is political, negotiating what a product should do to support a business goal, and much of that work takes place, in...yes, meetings."

Conducting Effective Meetings

Since meetings are so important to the organization we have synthesized this quick reference based on helping organizations instill meeting discipline and training. It incorporates good practices for how your organization could handle meetings, including:

1. Deciding on a Meeting
2. Meeting Preparation
3. Conducting the Meeting
4. Meeting Follow-up

I. Deciding on a Meeting

Prior to calling for the meeting it is critically important to consider what meetings are good for and whether a meeting is needed altogether. Technology is offering us plenty of surrogates for in-person meetings such as conference calls, video conferences, web-meetings as well as other less interactive mediums such as voicemail, email, and web-postings. In-person meetings should be considered when:

- Several people need to provide information, buy in and accept a decision
- Everyone must be on the same page with a complex issue
- There is a need for creative brainstorming

- People must coordinate around a difficult problem or task
- Shared discovery of problem definition or solution design
- There is a need for conflict resolution
- Communication of information must result in synergy and motivation

With roles more clearly defined and ground rules in place, it becomes easier for groups to move meetings to mediums such as conference calls. However, we often see utter chaos and ineffectiveness when teams are established via conference calls without ever having related in-person. As a species, we have not yet evolved to master effective communication without the subtle clues and reinforcement that comes from observing in-person behavior.

2. Meeting Preparation

An effective meeting requires careful preparation. There are different types of meetings or rather there are different meeting processes that can be applied and in turn will define the meeting type. Here are the critical things to consider when preparing for a meeting:

- Meeting Objectives – describes the desired outcome of the meeting
- Meeting Agenda – in creating the agenda, be cognizant of the different meeting processes that can be applied to each agenda item. An agenda item should be restricted to a single process since each process has a different outcome.

<u>Meeting Process</u>	<u>Desired Outcome</u>
Presentation	Information disbursement
Action Planning	Action plan
Decision Making	Decision
Conflict Resolution	Resolution
Problem Discovery	Problem Definition
Brainstorming	Ideas
Solution Design	Design Definition
Prioritization	Priority Matrix

- Meeting Attendees – pay attention to who is invited to the meeting. Do you have the people with the critical information or required expertise? If we are making a decision, do we have the people with authority to do so? Are we leaving anyone out that is part of the process or regular work group? If we are generating ideas, do we have people who can stimulate the discussion?
- Meeting Roles and Preparation – make sure that all attendees understand their role in the meeting in advance. Be very clear on any pre-work to make sure that everyone is prepared for the meeting, especially individuals expected to present information. The roles of Leader, Facilitator, and Recorder must also be carefully considered. In some meetings, the three roles can be occupied by the same person. In larger group or with contentious issues these roles should be broken up and assigned to different people.

- Meeting Logistics – All too often we arrive for a meeting where adequate meeting facilities have not been secured in advance, leaving for a last minute scramble that sets the meeting off to a wrong start. Be clear on date and time (including end-time), location and setup requirements as well as materials to bring.

3. Conducting the Meeting

Meetings are generally conducted through three different main stages:

- Opening – is where participants are reminded of the ground rules, places the meeting in perspective, and reviews the objective and the agenda. The meeting facilitator has different tools to engage meeting participants. In smaller meetings, it is useful to ask participants to “check in” with the group by clarifying state of mind concerning attention and intention for the meeting.
- Facilitation – of the meeting according to agenda and ground rules. Meeting facilitation is an art form that it can take long to master. Each particular meeting process has activity steps and short-cuts that must be considered. With the meeting process, a variety tools can be applied to make the activity more effective. A meeting facilitator must also be aware of the dynamics within the meeting; make sure that everyone is heard. Dynamics happens in the interplay of content, process and behavior. Experienced facilitators notice any misalignment between these aspects and may choose to make an intervention.
- Closing – is where the meeting outcome and next steps are reviewed and the meeting is evaluated through a formal or informal process. The evaluation is used gain feedback so the group can learn and choose to improve future meetings. As part of next steps, it is essential to review decisions, place accountability for actions, and determine what and how should be communicated from the meeting.

Ground rules

Every organization ought to have official meeting ground rules. Instead we find that most organizations operate with none or unspoken ground rules that have been established over time. These undefined ground rules are typically flawed and makes it very hard for outsiders to be effective in communicating with the organization. Ground rules can be as simple as this sample list:

- All meetings must have clear objectives and agenda
- Start and end meetings on time
- Stick to agenda and item
- Use “parking lot” for off-agenda items
- One person speaks at a time
- No side conversations in meetings
- No use of mobile phone
- No use of laptop computers – except for note taking

- Reach a conclusion and record it before moving on
- End meetings with a comment about the meeting from each attendee

4. Meeting Follow-up

During the meeting, the Recorder must document the meeting accurately and preferably visually. This can be done using flip charts or whiteboards or - as has become my favorite - using a laptop with a digital projector attached. When meeting notes are taken visually it allows all participants to understand what is recorded and minimizes post meeting misunderstandings.

After the meeting, the recorded notes must be distributed along with next steps. Most meetings result in assignments and responsibilities that must be acted on. Hence it is very important that the meeting summary include agreed upon action plans and assignments.

About the Author

As President of Kollner Group, Soren Eilertsen has helped numerous clients in different industries activate and align leadership teams around business results and innovation. Clients praise him for his ability to guide business leaders and teams to insights and new levels of success.

Soren works as a business consultant, educator and leadership coach specializing in strategy and organization development. He helps clients build effective leadership teams, create winning strategies, and obtain success with change initiatives.

Since establishing Kollner Group in 1999, Soren has helped shape the strategic directions and create results for numerous businesses and non-profits in both Europe and the United States. He has worked on world-class endeavors and been fortunate to engage with leaders in great organizations such as AECOM Design, American Suzuki, McKesson, Mission Critical Technologies, MK Sound, Motown Museum Project, Nordisk Film Biografer, Pacific Coast Producers, Pacific Theatres, Polar Air Cargo, Rand, System Simulations, UC Health System and Vulcan (Paul Allen).

Combining his education as a psychologist with years in corporate executive roles, Soren takes a unique integral approach that enables him to examine a business from the perspective of its internal leadership, systems, and culture as well as from the market-, business value-, and external customer perspectives.

Visit www.kollnergroupp.com to find out more about Soren Eilertsen and the Kollner Group.

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