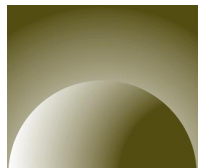
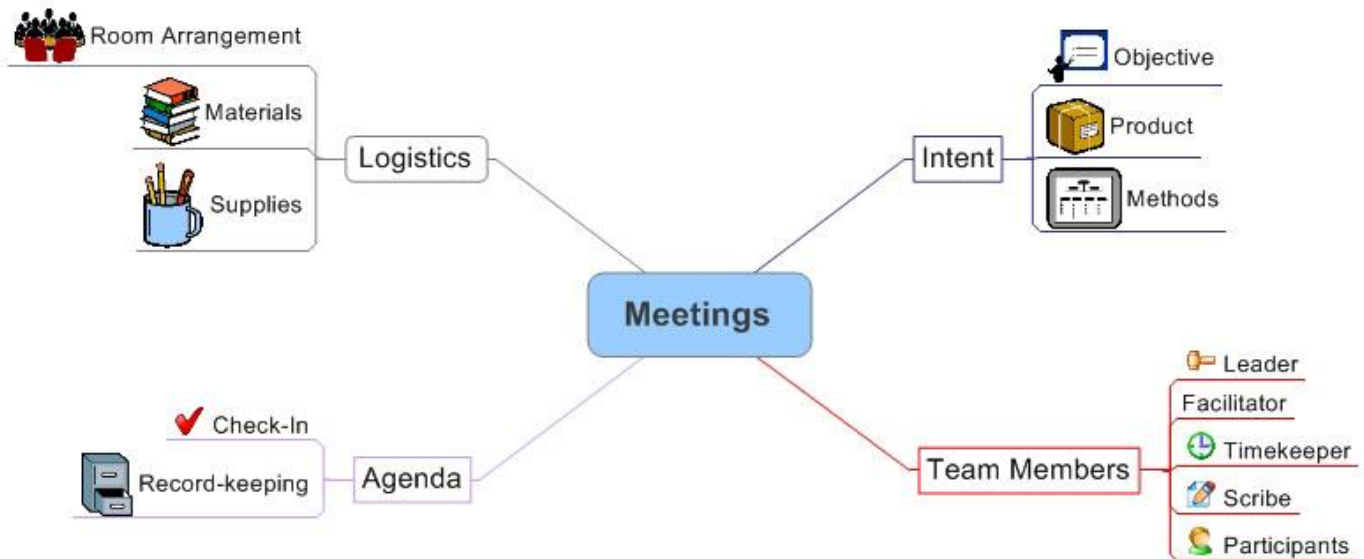

Leading Lively Meetings

Getting on the Same Page



MILLENNIA
CONSULTING®

28 East Jackson Boulevard
Suite 1020
Chicago, Illinois 60604
312-922-9920 • fax 312-922-0955
www.ConsultMillennia.com
Millennia@ConsultMillennia.com

Hour after hour we meet to interact with fellow employees to discuss common purposes which support the mission of our organization and the clients that we serve.

Team leaders find themselves leading discussions on the progress of team projects, collecting and interpreting data, and communicating results. In addition there are meetings one is required to attend to and the challenge is to keep them interesting, succinct, and purposeful.

Learning Objectives

- To understand the basic principles of meeting effectiveness
- To identify the characteristics of effective meetings and the barriers that interrupt meeting success
- To set meeting goals and objectives for the first meeting of a new team project
- To create meaningful record keeping systems
- To learn to create effective agendas.



Barriers to Effective Meetings

What are the roadblocks to effective meetings?

Individual Reflection

Jot down below the barriers to effective and productive meetings. Consider the leader, the participants, and the processes used before, during, and after the meeting.

-
-
-

Characteristics of Effective Meetings

What are the ingredients of a good meeting?

Affinity Exercise

Identify one person from your group to lead you through this affinity exercise.

- Individually list 6-7 characteristics of effective meetings on separate sticky notes. Use 3-5 word phrases.
- Randomly place your ideas on the wall and begin to silently arrange them in columns of similar thought.
- Once the columns are formed review all of the responses in each column and come up with a heading for each one. Each heading should include 3-5 descriptive words that summarize the characteristics listed, identifying a common theme.

Meeting

DEFINITIONS

A coming together . . .
a gathering of people.
Webster's Dictionary

A meeting is any kind of purposeful coming together of people to carry out the business of the organization.
The Meeting Management Team at 3M

"We meet because people holding different jobs (responsibilities/roles) have to cooperate to get a specific task done. We meet because the knowledge and experience needed in a specific situation are not available in one head, but have to be pieced together out of the knowledge and experience of several people."
Dr. Peter Drucker, in The Effective Manager

Ground Rules

The do's and don'ts of team meetings

GROUND RULES ARE synonymous with a list of guiding principles that the group agrees on describing the do's and don'ts of every team meeting.

Ground rules are most often identified in the first meeting while people are still getting to know each other. Team leaders set the tone by offering examples to get the rest of the team involved in creating the list. It's important to get everyone's input so the group begins to understand the values of their colleagues.

Sometimes ground rules deal with how meetings should be led or the frequency in which meetings should be held. Ground rules may deal with attendance, interruptions, or decision making and how group roles are rotated.

Some examples might include:

- Starting and ending on time
- Rank has no privileges
- Everyone participates in discussions

A good rule of thumb is for the group to place the ground rules in a visible place inside the meeting room each and every time the group convenes as a constant reminder of how they want to conduct business.

Synonyms for "Ground Rules"

- Common Courtesies
- Community Care Agreement
- Learning Community Guidelines
- Operating Agreement
- Meeting Commandments
- others?

ASSIGNMENT

Individually create a list of some possible ground rules that you would offer as examples to your team if they were having difficulty coming up with their own.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

Compare and contrast your answers with others at your table. Look for new ideas from each other.

Hint:

Some facilitators distinguish between: "procedural ground rules" (i.e., "take care of your comfort", "one person speak at a time") and "behavioral ground rules" (i.e., "practice active listening", "use 'I' statements and refrain from blaming").

Meeting Objectives (Purpose)

Why are we here anyway?

MEETING OBJECTIVES ARE THOSE items that you would like to achieve at the conclusion of a specific meeting time. When objectives are clear, participants are less likely to misunderstand what will be discussed and more likely to be prepared to contribute.

Objectives are specific.

By sticking to the objectives, participants will make better use of their talent by zeroing in on a specific problem.

An OBJECTIVE (PURPOSE) might be:

To determine 1-2 priority activities that will improve participation in the agency's activities.

The PRODUCT is literally a tangible piece of evidence of the meeting's success, such as an Action Plan, a TimeLine, or a series of recommendations.

Once the meeting's purpose (objectives) and product have been defined, then the issue is one of appropriate group PROCESSES or methods that may need to be employed to achieve the desired results.

ASSIGNMENT

If the PURPOSE/OBJECTIVE of the meeting is:

The PRODUCT might be:

The PROCESSES might be:

At Kanbay, you can't call a meeting unless you announce the 3P's beforehand:

- 1. The Purpose*
- 2. The Product*
- 3. The Process*

Raymond J. Spencer, President and CEO
Kanbay International

Meeting Methods and Processes

What facilitation techniques fit the meetings purpose and product?

In this seminar you are exposed to various methods and processes that have been added to your toolkit that you can tap into and determine which one(s) fit your needs the best.

Keeping a database list of your techniques is a good idea. A helpful resource is the IAF (International Association of Facilitators) Methods Database which is a free service and located on the web at <http://www.iaf-methods.org>.

What are the appropriate methods that will encourage participation produce the desired results and promote effective action?



Meeting Agendas

The meeting road map

AGENDAS KEEP MEETINGS focused and structured. They can even help you stay on time. When participants have the agenda ahead of time, then they can prepare and schedule their other business accordingly.

What are the characteristics of a good agenda?

Consult with members about your meeting effectiveness. It is not always the responsibility of the meeting leader to provide feedback.

See page 14 for an agenda template.

What is the most helpful use of time to accomplish the stated objectives?

R E M E M B E R !

- ✓ Ask team members for input for the agenda in advance.
- ✓ Don't take on more than can be reasonably expected.
- ✓ Set realistic deadlines

U.S. businesses hold 15 million meetings per day and 4 billion meetings per year. Business managers spend as much as 80% of their time in meetings.

Room Arrangements

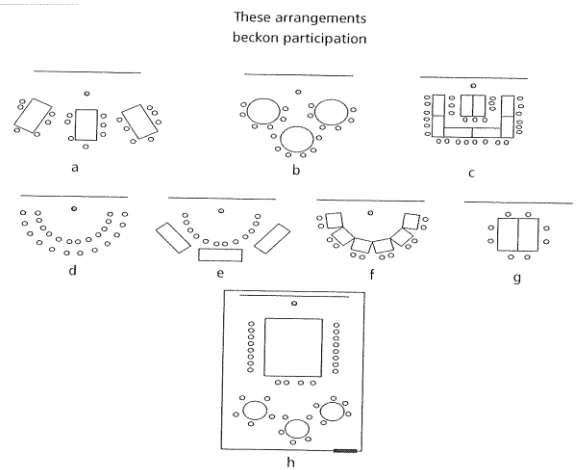
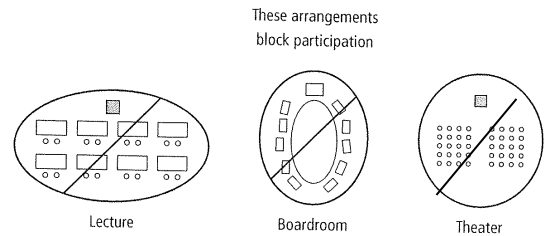
The space configuration effects participation

Careful selection of appropriate space is important for setting the mood of the meeting and influencing the group dynamics constructively. Considerations include: location and room selection, seating arrangements, and décor.

Selecting the appropriate location and atmosphere for a group session is a critical factor in planning a meeting. The space will influence:

- The group's sense of the seriousness of the task and of their importance to it,
- The comfort and effectiveness of the group throughout the process, and
- The flow of the group processes.

For more on the importance of room arrangements, consult, "The Architecture of Participation," by Patricia Tuecke, in *The IAF Handbook of Group Facilitation*, Sandy Schuman (ed.), 2005, Jossey-Bass.



How do you shape the space to enable desired results?

Check-Ins

Meeting icebreakers can be helpful

CHECK-INS ARE FUN because they give everyone a chance to participate in the meeting right away. A brief check-in can set or change the tone of any meeting.

You begin the meeting by asking everyone to greet each other and tell one thing that is on their mind that might be a barrier to their participation in this meeting.

- It could be business or personal.
- It could be a good joke, or of a very serious nature.

Right away you'll be able to tell what kind of mood your team members are in. Sometimes that can make or break a meeting.

EXAMPLES:

"Hi everybody, I'm here but not in a great mood, because I lost a very important document on the system and have spent hours trying to recover it."

"Hi, I'm having a real bad day, my son's school bus died in route and I had to cart 8 kids to school today. Needless to say my whole schedule is off."

"Hey, a highlight from my holiday was



"Everyone here? Good. Meeting topic: Setting world record for shortest meeting. All in favor say aye. Ayes have it. Meeting over."

Recordkeeping

Tracking team decisions

JUST AS AGENDAS GET YOU started and keep your meetings focused, good note taking helps you to maintain that focus from meeting to meeting. Good records can save you a lot of time. You don't have to rely on different members' perceptions or memories in order to keep the momentum needed to move forward.

- Meeting notes should be clear.
- Do not include confidential information that the group cannot share outside of the meeting.
- Avoid jargon and insure accuracy.

The recordkeeping responsibility can be rotated around to keep all team members engaged in the group's activities. These records are helpful in keeping everyone informed about the project's status.

All records should be kept for every meeting and be compiled in a central location for easy access and reference.

How do you pull together the decisions, plans and products of the meeting so that can be remembered and built upon going forward?



"To insure that we keep this meeting under thiry minutes, I'll just set this timer."

Roles & Responsibilities

Who does what?

Team Leaders

Team leaders are responsible for keeping the group focused on achieving their goals. They work together with the facilitator to divide up meeting leading responsibilities and team follow-up. Effective leaders provide the glue that keeps everyone together. They model optimum meeting conduct.

Team leaders are responsible for attending all meetings and setting up meeting logistics (e.g., when and where the meetings will be held). Leaders are also responsible for making sure that all meetings have the proper materials needed to facilitate the meeting, (e.g. paper, markers, flipcharts, tape, post-its). Team leaders confer with the rest of the team to agree on upcoming meeting agenda topics.

Facilitator

The team facilitator acts as a resource for the team by employing different group process methods that can be used to arrive at decisions during each phase of the team's project. Objectivity is key in listening to group concerns and determining the right questions to ask that hope to create real break through thinking for the entire group.

Timekeeper

The timekeeper is responsible for helping the group to start and end on time. When a certain amount of time has been allotted for a specific topic then the timekeeper is responsible for informing the group when they are close to the end of the time and again when the time is up. This is a very important role that can be rotated among team members

Scribe

The scribe is the group note taker. It is another role that can be routinely rotated. This team member takes notes at the meeting and documents the topics that are discussed and any decisions that were made in the meeting. The scribe is responsible for making sure that copies of the meeting minutes are provided to everyone.



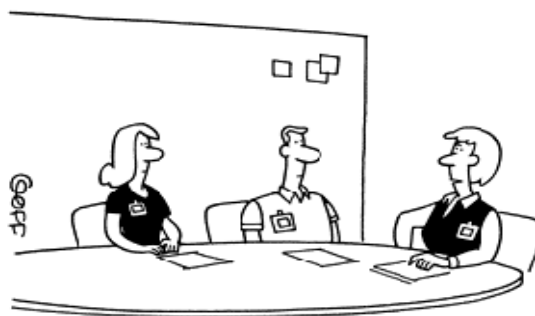
"And should there be a sudden loss of consciousness during this meeting, oxygen masks will drop from the ceiling."

Participating in Meetings

Everyone is responsible

To dramatically improve participation in meetings:

1. Consider all of your knowledge, ideas and opinions as functions of your unique perspective or point of view. Consider each other person's knowledge, ideas and opinions as functions of their points of view. All are valid and true for the speaker.
2. Pay attention to your own point of view, especially as it relates to others. Doing this will help you discern your own beliefs and values and be more comfortable with them.
3. Remember that considering an issue from many different points of view is what makes a team smart. Therefore, treasure the opportunity to meet with people who perceive things differently than you do.
4. Practice "playback listening." Listen to others with your internal recorder turned on so that you can play back their words to them exactly. This powerful practice will help you develop the capacity to acknowledge others' points of view. Do this whenever it is critical that someone be heard.
5. Hear others with the intention of integrating your point of view with as many others as you can. To do this, though, you must be willing to hear -- and validate -- all other points of view. And, not just when you agree with them, but all the time.
6. Remove "right" and "wrong" from your vocabulary. Replace the words with "works" and "doesn't work" -- as in "that works for me" and "that doesn't work from my point of view." Try it for three days and see if you can feel less judgmental and more open to multiple viewpoints



"Come on, people. We need a creative epiphany right now. Who has one?"

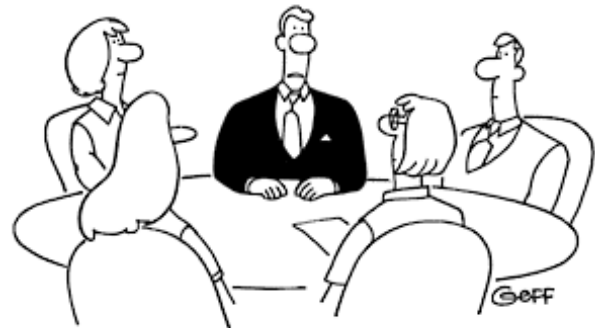
Meeting Checklist

Tips of the trade – plan ahead

1. Ask yourself the following questions:
 - a. What ongoing issues are we dealing with? What new developments are going to change things?
 - b. What progress reports should the team hear?
 - c. What information does the team need before it can go on to the next steps of planning or implementation?
 - d. Is the team having any difficulties carrying out its plans and decisions?
2. Define the objectives or outcomes for the meeting in advance to participants.
3. Prepare an agenda
4. Set defined limits and parameters for the meeting – what it is and what it is not about
5. Insure proper attendees are present
6. Schedule meetings in advance. Have a pattern of regularity for days, time, and place
7. Respect the opinions of each person
8. Come prepared as a participant
9. Conduct a debriefing at the end of every meeting to insure that there is agreement and understanding

What are other “tips of the trade”?

- ◆
- ◆
- ◆
- ◆



"Whew! That was close! We almost decided something!"

Meeting Agenda Template

Meeting Agenda			
Date:	Time:	Place:	
<u>Objectives:</u>		<u>Expected Attendees:</u>	
Topic	Led By	Time Estimate/ Actual	Follow-up

Remember don't put too many topics on the agenda at once.

Competently Close Your Meetings

You may have designed, planned and facilitated it well - but if your meeting is not closed competently - your desired outcomes may not be achieved. Barbara Streibel (Manager's Guide to Effective Meetings, McGraw-Hill, 2003) offers wisdom on how to make sure that "all's well that ends well."

- Summarize - Be sure to summarize main points, decisions, actions and assignments.
- Acknowledge - Thank participants in general and specifically those with special responsibilities for the meeting and those assigned to tasks.
- Evaluate - Don't forget to evaluate the meeting to be sure you can repeat the things you all did well and improve where needed.
- Timing - End on time to let participants know you respect their time, to encourage participants to work efficiently in the agreed upon time frame and to minimize frustration!
- Document - Make every effort to get the meeting minutes or whatever meeting results report to all those in attendance as soon as possible.

A quick and dirty evaluation format

+'s	Δ's