GOODIE BAG

OPTIMIZE MEETING EFFECTIVENESS:
HOW TO GET RESULTS

November 20, 2020

<u>Links to additional resources:</u>

The Surprising Science of Meetings, Steve Rogelberg's website

- Good Meeting Facilitation: Checklist

- Run Better Meetings article

- Alternative Agenda Approach

- The Surprising Science Behind Successful Remote Meetings, MIT

How to Create the Perfect Meeting Agenda, Harvard Business Review

How to Create the Perfect Meeting Agenda: A Step-by-Step Guide to Structuring Better Meetings, Harvard Business Review

10 tips to run more effective meetings in 2020, The Enterprisers Project

9 ways to fix awful virtual meetings, The Enterpriser Project

How to run meetings that hurt less, The Enterpriser Project

What It Takes to Run a Great Virtual Meeting, Harvard Business Review

How to Run a More Effective Meeting, New York Times

4 Ways to Be More Effective in Meetings, New York Times

When You've Had One Meeting Too Many, New York Times

How to Create the Perfect Meeting Agenda, Harvard Business Review

Economic impact of bad meetings, TED

David Grady (6-min TED Talk: How to save the world (or at least yourself) from bad meetings)

Want a better decision? Plan a better meeting + 42 min podcast , McKinsey & Company

The Single Best Predictor of a Successful Meeting is…., The Goodman Center

Decision-focused meetings, Bain & Company

Created by Jennifer Phillips, IdeaFuel Consulting

PROTECT YOUR TIME! EFFECTIVE MEETING CHECKLIST

Are you sure you need a meeting? Know the purpose?

Is there an agenda and has it been shared in advance?

Is the agenda realistic and achievable?

Do you know who is leading the meeting? Are roles assigned?

Do you know the meeting type and how decisions will be made?

Is there a commitment to meeting etiquette?

What preparation is needed in advance?

Are the right people included?

Ready to end the meeting? Use WWW: Who does What by When?

LOGO HERE

SAMPLE MEETING AGENDA

- **Meeting Date & Time:** 8:00-9:30 a.m.
- **Location:**
- **Contact:** Name, email, phone
- **Participants:**

| **Major goals or key objectives for the meeting** **Key decisions that must be made** 1. 2. 3.			
TIME	**TOPIC**	**PRESENTER**	**WHAT'S NEEDED?** **I= Information** **D=Discussion** **A=Action**
Time	**Item 1: Key word or strategic question to be answered** *note any related materials for this topic (hyperlink or attach)*	**Designate**	**I, D, A**
Time	**Item 2: Key word or strategic question to be answered** *note any related materials for this topic (hyperlink or attach)*	**Designate**	**I, D, A**
Time	**Item 3: Key word or strategic question to be answered** *note any related materials for this topic (hyperlink or attach)*	**Designate**	**I, D, A**
9:20 ***ALWAYS RESERVE TIME AT END***	**WWW: <u>Who</u> does <u>What</u> by <u>When</u>?** • **Key Takeaways** • **Actions and responsible individuals** • **Notes or preview of next meeting (including topics to cover)**	**Designate**	**A**
9:30am	**Adjourn**		

Great Meetings Drive Change

Spend less time in meetings while dramatically increasing their value. Great Meetings are organized, focused, fast, positive, participative, and proactive. Participants come prepared and leave energized. Great Meetings result in decisions and action.

Establish behaviors that optimize the inputs (Information, Decision, and Action) and outputs (Results) will follow

-Generate accurate and relevant data that is understood by all stakeholders (**Information**)

-Establish standardized processes aligned across the business for making high-quality, timely, and effective decisions (**Decision**)

-Apply decisions quickly and consistently to create tangible progress (**Action**)

$$I \times D \times A = R$$
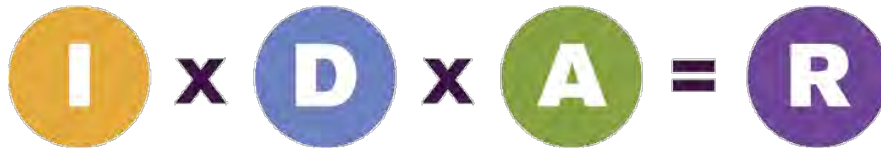
Five Elements for Effective Agenda

- **Objective**: A clearly written statement of the meeting goal. This is NOT a "topic" or "subject". It is a specific desired outcome. A meeting's success can be measured against its objective. For best results, keep the objective simple and focused.

-**Participants**: Smaller meetings are better. Relentlessly pare back. Only include people with valuable insights or a strong stake in the outcome.

-**Time-Box**: Participants appreciate a strictly enforced start time and end time. Nothing maintains focus like an enforced deadline.

-**Context + IDA (Information, Discussion, Action):** Why this meeting is important, what will be debated, and what people currently think. When appropriate includes a proposed decision (a starting point for discussion).

-**Preparations**: Required preparation for the meeting. If a participant does not have time to prepare, they should not have time to attend.

During the Meeting

- **Focused:** Great Meetings stay tightly focused on delivering objectives. Tangents and circular debates are quickly identified and stopped.

-**Fast:** Great Meetings start on time, end on time, and move quickly. Start by framing the objective and set the tone by getting right down to business.

-**Positive:** Great Meetings are positive and motivating. They are an arena of ideas. The focus is on the idea – not the person advocating the idea. People leave excited and committed.

-**Participative**: Great Meetings are active. Everyone participates. Otherwise – why are they there? People are free to decline an invite if they will not add value. People are free to leave if they are not adding value.

-**Proactive:** Great Meetings have a strong bias to action. Minutes (what happened) are deemphasized. Actions (what will happen) are emphasized. The meeting closes with a concise recap of the decision and actions.

Adapted from https://www.vorne.com/accelerants/great-meetings.htm

Created by Jennifer Phillips, IdeaFuel Consulting

10 Ground Rules for Meetings

1 Show up on time and come prepared
Be prompt in arriving to the meeting and in returning from breaks.
Be prepared to contribute to achieving the meeting goals.
Come to the meeting with a positive attitude.

2 Stay mentally and physically present
Be present, and don't attend to non-meeting business.
Listen attentively to others and don't interrupt or have side conversations.
Treat all meeting participants with the same respect you would want from them.

3 Contribute to meeting goals
Participate 100% by sharing ideas, asking questions, and contributing to discussions.
Share your unique perspectives and experience, and speak honestly.
If you state a problem or disagree with a proposal, try to offer a solution.

4 Let everyone participate
Share time so that all can participate.
Be patient when listening to others speak and do not interrupt them.
Respect each other's' thinking and value everyone's contributions.

5 Listen with an open mind
Value the learning from different inputs, and listen to get smarter.
Stay open to new ways of doing things, and listen for the future to emerge.
You can respect another person's point of view without agreeing with them.

6 Think before speaking
Seek first to understand, then to be understood.
Avoid using idioms, three letter acronyms, and phrases that can be misunderstood.
It's OK to disagree, respectfully and openly, and without being disagreeable.

7 Stay on point and on time
Respect the groups' time and keep comments brief and to the point.
When a topic has been discussed fully, do not bring it back up.
Do not waste everyone's time by repeating what others have said.

**8 Attack the problem, not the person**
Respectfully challenge the idea, not the person.
Blame or judgment will get you further from a solution, not closer.
Honest and constructive discussions are necessary to get the best results.

9 Close decisions and identify action items
Make sure decisions are supported by the group, otherwise they won't be acted on.
Note pending issues and schedule follow up meetings as needed.
Identify actions based on decisions made, and follow up actions assigned to you.

10 Record outcomes and follow up
Record issues discussed, decisions made, and tasks assigned.
Share meeting reports with meeting participants.
Share meeting outcomes with other stakeholders that should be kept in the loop.
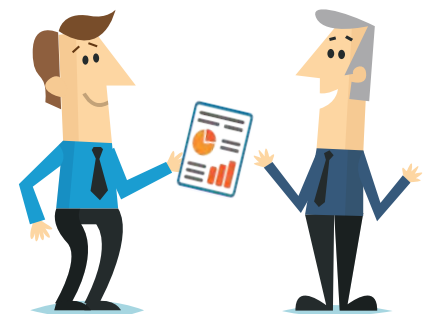
THE SCIENCE OF SUCCESSFUL MEETINGS
A DEEP DIVE into the SCIENCE OF EFFECTIVE MEETINGS

We Need Meetings
But we need Them To Be Better

Have Agenda
• You Dont have to Do it All
• Diversity Means Nothing without Engagement

Owners
• ID Your Meetings Officer

Agenda As Questions

Start & End on Time
• Build in Buffer Time

Start Strong Xact As Host
• Ask For Meeting Feedback

Set Limits on Updates

Be A Steward of Time
• Never Default To One Hour!
• Manage Meeting Size
• Post Meeting Surveys

Be Intentional With Your Time

Meetings/Day Directly impacts Burnout
Train Your Leaders To Facilitate

Prime Quieter Individuals To Contribute

Meeting Apps For Voting
Collect Insights Ahead of Time
Dyadic Pairs enable New Voices

Mayfield 50
STEVEN ROGELBERG, AUTHOR, THE SURPRISING SCIENCE OF MEETINGS

https://www.stevenrogelberg.com/

Created by Jennifer Phillips, IdeaFuel Consulting

5 elements of good meeting facilitation

time management

- ☐ Keeps track of time and paces the meeting effectively, given the big picture of the agenda.
- ☐ Does not rush through an emergent issue that truly needs to be discussed. Recognises if an issue raised is best addressed at subsequent meeting.
- ☐ Keeps conversation flowing. Recognises a tangent and pulls back what needs to be discussed.

active listening

- ☐ Keeps clarifying & summarizing where things are & manages the conflict so that conflict positive benefits for performance & decision-making ensue.
- ☐ Listens carefully for underlying concerns and helps bring them out so disagreeing. Invites debate.
- ☐ Keeps angaged with the note-taker so that issues, actions, comments, & takeaways are recorded and not lost. Confirms accuracy

conflict management

- ☐ Encourages conflict around ideas & then actively embraces & manages the conflict so that positive benefits for performance & decision-making ensue.
- ☐ Maintains an environment where people are comfortable disagreeing. Invites debate.
- ☐ Deals with disrespectful behaviour quickly through re-direction, staying constructive, and reminds attendees

ensuring active participation

- ☐ Actively draws out input from others. Keeps mental track of who wants to speak and comes back to them.
- ☐ To keep an attendee from dominating the conversation, uses body language (e.g. subtle & small hand movement to stop) and transition statements (e.g. "thank you for that").
- ☐ Keeps side conversations at bay by reigning folks in when they lose focus.

pushing for consensus

- ☐ Tests for agreement & consensus to get a sense of where attendees are at, but does not unduly & unnecessarily pressure others to reach a conclusion when not ready.
- ☐ Knows when to intervene assertively in the meeting process and provide direction and when to let the process run as it is.
- ☐ Is an honest broker of the conversation at hand and does not privilege his or her viewpoint or ideas in the discussion. Works to remain impartial.

Created by Jennifer Phillips, IdeaFuel Consulting

Team Cadence

Weekly Team Meeting
Daily Huddle
Working Session

Progress Check

Project Status Update
Portfolio Review
Stakeholder Update

One-on-One

Manager One-on-One
Coaching Session
Mentoring Session
"Catching Up"

Action Review

Retrospective
Win/Loss Review
Rehearsal

Governance Cadence

Board Meeting
Quarterly Strategy Refresh
Client QBR

Idea Generation

Solution Brainstorm
Ad Campaign Ideas
Requirements Brainstorm

Planning

Project Planning
Product Development Planning
Campaign Planning
Event Planning

Workshops

Design Workshop
Team Building
Value Stream Mapping
Kickoff
Chartering

Problem Solving

Root-Cause Resolution
Incident Response
Plan Reset

Decision Making

Strategic Opportunity Decision
Candidate Selection
Final Approval

The Taxonomy of Business Meetings

- **Congenial Meetings**
- **Formal Meetings**
- **Intense Meetings**

LUCID

Sensemaking

Investigations
Informational Interview
Market Research
User Testing
Discovery

Introductions

Sales Call
First Interview
New Hire Introduction
Investor Pitch

Issue Resolution

Support Escalation
Contract Negotiation
Dispute Resolution

Community of Practice

Meetups
Safety Committee
Lunch-n-Learn

Training

Skills Certification
New Hire Training
Client Training

Broadcasts

All-Hands Meeting
Webinars
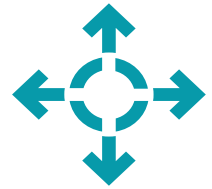Press Briefing

The Cadence Meetings

Meetings with known participants and predictable patterns used to review work, renew connections, and refine plans.

Meeting Type	Intention	Format and Expected Participation Profile
Team Cadence	• Ensure group cohesion • Drive execution *Examples* • the Weekly Team Meeting • the Daily Huddle • the Shift-Change Meeting • a Regular Committee Meeting	• Manager or team member led • Collaborative engagement • Relationship quality important • Regularized, often ritualized • Surprises tolerated but not encouraged
Progress Checks	• Maintain project momentum • Ensure mutual accountability *Examples* • the Project Status Meeting • the Client Check-In • the Portfolio Performance Review	• Led by a project lead • Structured engagement • Relationship quality less important • Structure varies by team and project • Surprises unwelcome
One-on-Ones	• Career and personal development • Individual accountability • Relationship maintenance *Examples* • the Manager-Employee One-on-One • a Coaching Session • a Mentorship Meeting • the "Check In" with a Stakeholder	• Led by either party • Conversational engagement • Relationship quality critical • Very loosely formatted: conversational • Surprises neither welcome nor discouraged
Action Reviews	• Learning: gain insight • Develop confidence • Generate recommendations for change *Examples* • Project and Agile Retrospectives • After Action Reviews and Before Action Reviews (Military) • Pre-Surgery Meetings (Healthcare) • Win/Loss Review (Sales)	• Led by a team lead • Highly structured engagement • Relationship quality important • Structure varies by team and project • Meetings may be very ritualistic • Serendipity expected in the form of lessons learned
Governance Cadence	• Strategic definition and oversight • Regulatory compliance and monitoring • Relationship maintenance *Examples* • Board Meetings • Quarterly Strategic Reviews • QBR (a quarterly review between a vendor and client)	• Chair led • Structured and collaborative engagement • Relationship quality less important • Strong governing rules • Surprises unwelcome

The Catalyst Meetings

Meetings with participants and patterns customized to fit the need, designed to create change.

Meeting Type	Intention	Format and Expected Participation Profile
Idea Generation	• Create a whole bunch of ideas *Examples* • Ad Campaign Brainstorming Session • User Story Brainstorm • Fundraising Brainstorm≠	• Led by a facilitator or group leader • Collaborative engagement • Relationship quality less important • Loosely structured, abides by the governing rules for brainstorming • Serendipity is the point
Planning	• Create plans • Secure commitment to implementing the plans *Examples* • Event Planning • Campaign Planning (Marketing) • Product Roadmap Planning	• Led by a team lead • Collaborative engagement • Relationship quality less important • Structure varies by team and project • Serendipity invited, but not a focus
Workshops	• Group formation • Commitment and clarity on execution • One or more tangible results; real work product comes out of workshops *Examples* • Project, Program and Product Kickoffs • Strategic Planning Workshop • Design Workshop • Value Stream Mapping • Team Building Workshop	• Led by a facilitator • Structured collaborative engagement • Relationship quality less important • Bespoke meeting design • Highly planned and organized • Serendipity a goal
Problem Solving	• Find a solution to a problem • Secure commitment to enact the solution *Examples* • Incident Response • Strategic Issue Resolution • Major Project Change Resolution	• Led by a team leader • Structured collaborative engagement • Relationship quality matters; safety in the conversation more important than long-standing relationships • Structured and formalized • Serendipity the point
Decision Making	• A documented decision • Commitment to act on that decision *Examples* • New Hire Decision • Go/No-Go Decision • Logo Selection • Final Approval of a Standard	• Led by a team leader, chair, or facilitator • Structured collaborative engagement • Relationship quality important; safety in the conversation needs to be established • May be formally structured or not • Surprise unwelcome; everyone is expected to arrive fully prepared

The Learn and Influence Meetings

Efforts to learn, evaluate and influence, these meetings are between an "Us" and a "Them" with information to share and questions to resolve.

Meeting Type	Intention	Format and Expected Participation Profile
Sensemaking	• To learn information that can inform later action *Examples* • Informational Interviews • Project Discovery Meetings • Incident Investigations • Market Research Panels	• Led by an interviewer or group lead • Conversational engagement • Relationship quality less import to success; rapport matters more • Governing rules for privacy, information use • Question-Answer format • Serendipity welcome
Community of Practice	• Topic-focused exchange of ideas • Relationship development *Examples* • The Monthly Safety Committee Meeting • The Project Manager's Meetup • The Lunch-n-Learn	• Led by an organizer or committee leaders • Conversational and passive engagement • Relationship quality less important • Format varies by topic and group; usually includes time for networking • Serendipity welcome
Introductions	• Learn about each other • Decide whether to continue the relationship *Examples* • the First Meeting Between Professionals • the Sales Pitch • the Sales Demo • the First Meeting with a Potential Vendor • the Investor Pitch	• Led by the meeting organizer • Conversational engagement OR structured engagement • Relationship quality important; established in the meeting • Format varies by topic and group • Serendipity welcome
Issue Resolution	• A new agreement • Commitment to further the relationship *Examples* • Incident Response • Strategic Issue Resolution • Major Project Change Resolution	• Led by a team leader • Structured collaborative engagement • Relationship quality important; safety in the conversation is more important than relationships • Structured and formalized • Serendipity the point
Training	• To transfer knowledge and skills *Examples* • Client Training on a New Product • New Employee On-Boarding • Safety Training • Seminars	• Participants assigned • Led by the trainer • Structured participation required • Relationship quality unimportant • Varies: Presentation followed by Q&A or a series of exercises • Surprises unwelcome
Broadcasts	• To share information that inspires (or prevents) action *Examples* • the All-Hands Meeting • Webinars	• Participants invited based on role or interest • Led by the broadcaster • Little to no participation expected • Relationship quality unimportant • Presentation optionally followed by Q&A • Surprises unwelcome

Additional Resources Available from Lucid Meetings

The Book

- [Where the Action Is: The Meetings that Make or Break Your Organization](#)

About the Taxonomy

- Original Blog Post: [The 16 Types of Businses Meetings](#)
- [A Periodic Table of Meetings](#)
- [The Interactive Chart of Meeting Types,](#) with detailed resources for each type

Meeting School

- [The Meeting Performance Maturity Model](#)
- [How to create meeting agendas](#)
- [How often should you meet](#)
- [How to make decisions in meetings](#)
- [40 Sample Agendas, with Guides](#)
- [Glossary of Meeting Terms](#)

Lucid Meetings provides technology and services that help organizations scale effective meeting habits.
We put your meetings on science.

Learn more on our website at www.lucidmeetings.com

HOW MUCH TIME DO MEETINGS WASTE?

Most employees attend an

There are more than
3 billion meetings
per year.

AVERAGE OF 62 MEETINGS PER MONTH.

There are more than
11 MILLION FORMAL MEETINGS

PER DAY

in the United States.

EXECUTIVES ON AVERAGE

SPEND 40–50%
of their working hours
in meetings.

Executives average 23 hours per week in meetings
WHERE 7.8 OF THOSE HOURS
are unnecessary and poorly run,

WHICH IS EQUAL TO

over 2 months per year wasted.

7.8 HOURS

33.91%
of all meetings
are wasted.

[Economic impact of bad meetings](#), TED

Created by Jennifer Phillips, IdeaFuel Consulting

How much money do meetings cost?

ESTIMATED TO WASTE

$37 BILLION A YEAR in the U.S.

A Fortune 50 company estimates losses in excess of $75 MILLION per year due to poor meetings.

A meeting between several managers or execs may cost upwards of $1,000 PER HOUR IN SALARY COSTS ALONE.

Economic impact of bad meetings, TED

Created by Jennifer Phillips, IdeaFuel Consulting

HOW EFFECTIVE ARE MEETINGS?

50 percent
of people find meetings
TO BE UNPRODUCTIVE.

73 percent
of employees do
OTHER WORK IN MEETINGS.

75 percent
of people have received no
formal training on
HOW TO CONDUCT A MEETING.

9 OUT OF 10
PEOPLE DAYDREAM IN MEETINGS.

25 percent
of meetings are spent discussing
IRRELEVANT ISSUES.

[Economic impact of bad meetings](#), TED