LEADING MEETINGS

MAKING MEETINGS EFFECTIVE

Most problem solving team effort will take place in meetings. This section of the booklet provides information about planning and leading effective meetings. Included are a checklist for effective meetings, examples of a meeting notice, meeting agenda and meeting minutes formats.

Effective teams evaluate their meeting effectiveness, both task and personal relations, on a regular basis. To help promote discussion, a meeting evaluation scale and a meeting effectiveness survey are included.

A CHECKLIST FOR EFFECTIVE MEETINGS

Before the Meeting

☐ Determine the purpose and objectives for the meeting
☐ Select participants who need to be there
☐ Send out meeting agenda, prework, and meeting notice

During the Meeting

☐ Present the agenda, objectives, and participation ground rules
☐ Stay on time and stay on the subject
☐ Summarize progress, identify action ownership, and set agenda for next meeting

After the Meeting

☐ Distribute meeting minutes or summary
☐ Follow up on action plans

EFFECTIVE MEETINGS

The following is an expansion of the "Checklist for Effective Meetings". It is intended to explain some of the details and offers some recommended steps that can help the meeting leader or meeting participants.

BEFORE THE MEETING

Determine the purpose and desired outcomes or objectives for the meeting.

Purpose:

The purpose can be one or more of the following:

- Informative*
- Routine reports*
- Educational*
- Discussion leading to negotiation or decision
- Personal introductions or team building
- Data gathering or problem solving
- Important personal or emotional message
- Recognition or entertainment

If your meeting purpose matches one of those items indicated by a star (*) in the above list, you should review the meeting purpose to consider using some other communication method.

Objectives or Outcome:

The objectives or outcomes would be described as a completed task, such as:

- Prioritize planned tasks (specify which ones)
- Gather data on (a particular problem or issue)
- Recognize recent special award recipients

Successful outcomes have three specific criteria. They are results oriented, measurable, and appropriate:

RESULTS ORIENTED

- The outcome describes the product of the meeting. Words like "discuss", "review", or "explore" describe activities that may happen at the meeting. The outcome should describe the products of the discussion, review, or exploration.

MEASURABLE

- Outcomes that can be measured lead to more successful meetings. A simple test is to plan how you will measure their accomplishment.

APPROPRIATE

- The appropriateness of an outcome is related to the ownership of the issue being considered. If those in the meeting are not really in control of resources, involved in implementation, or impacted by a decision, the outcome may not be appropriate for that group.

Select participants who need to be there.

- Identify who should attend, when, where, and for how long. Keep meetings as small as possible. Possible activities and outcomes will be limited by group size. Groups larger than seven may have trouble making decisions, larger than fifteen may have trouble discussing subjects, and larger than twenty-five may even have trouble asking questions. Select the location and time to maximize effectiveness.

Send out meeting agenda, prework and meeting notice.

- Plan the meeting. Meetings have two components, content and process. The subject matter and the outcomes are usually related to the content. How the meeting is managed and the specific activities of the participants constitute the process.
- Depending on the meeting purpose, select activities such as brainstorming, subgrouping, lecture, discussion, etc., and estimate the amount of time needed to attain the outcomes. Meetings longer than two hours are less effective. Optimum meetings are "modularized" to change pace frequently.
- Communicate the purpose and desired outcomes to all participants before the meeting. Specify what preparation is required and include written information as appropriate, include a meeting plan or agenda to facilitate clear expectations.

See sample meeting notice and agenda on page 10.

DURING THE MEETING

Present the agenda, objectives and participation ground rules.

- Review the meeting agenda.
- Restate the purpose and desired objectives. Start on time, post the agenda, introduce participants, and specify the type of participation desired.
- Review the meeting ground rules.

Stay on time and stay on the subject.

- Focus the discussion on the purpose and desired outcomes. Ask questions and listen to the participants. Get relevant information before attempting to solicit solutions. Solicit diversity. Focus on agreement. Maintain a balanced meeting pace and an open climate. Stay on schedule.

Summarize progress and identify action ownership.

- Reach conclusions, summarize and record agreements as the meeting progresses. Stop to review process and integrate ideas.
- Specify what action is to be taken.
- Make specific assignments and set target dates. Restate conclusions.
- Agree on how to monitor task progress and evaluate results.
- Set the agenda for the next meeting.
- Conclude and evaluate meeting. End on time.

AFTER THE MEETING

Distribute meeting minutes or summary.

- Prepare and distribute meeting minutes promptly.

Follow Up

- Encourage completion of assigned tasks. Follow up to assess progress.
- Identify unfinished business for next meeting.

See sample meeting minutes on page 11.

MEETING NOTICE

Those expected to attend:

Name	Mail stop

For information only:

Name	Mail stop

From: ______________________ Ext. __________

Group: ______________________

Date: ________ Day of the week: ________ Time start: ________ End: ________

Location: ______________________

Purpose of meeting: ______________________

____

Objective: ______________________

____

____

Agenda:

Subject	Presenter	Time

Preparation material attached: ______________________

MEETING MINUTES

Meeting objective: ______________________________

Date: ____________ Time: ____________

Attendees: ____________

Subject: ______________________________

Highlights/status: ______________________________

Subject: ______________________________

Highlights/status: ______________________________

Action item: ______________________________

Due date: ____________ Name: ____________

Action item: ______________________________

Due date: ____________ Name: ____________

Prepared by: ____________ Date: ____________

MEETING EFFECTIVENESS SURVEY

Meeting Effectiveness Survey

- This survey provides ten questions that parallel the "Checklist for Effective Meetings" presented in this section. The scoring is on a five point scale, from "to a very little extent" to "to a very great extent". Collate the data by adding total scores. The lower scores indicate possible opportunities for improvement.

Meeting: ______________________________

Score each of the questions:

1 = To a very little extent
2 = To a little extent
3 = To some extent
4 = To a great extent
5 = To a very great extent

1. Was the meeting purpose/objective made clear in advance to allow you to prepare for the meeting?
   ____
2. Was the agenda used to guide the meeting's progress?
   ____
3. Were you able to participate in discussion and decisions during the meeting?
   ____
4. Did the meeting proceed without interruptions (side conversations, off the track, etc.)?
   ____
5. Were decisions clarified or summarized?
   ____
6. Were action assignments made?
   ____
7. Were the appropriate people in attendance to meet the meeting's objective?
   ____
8. Do you believe this meeting can be improved?
   ____
   ____
9. Will meeting minutes or a meeting summary be prepared? Yes ____ No ____
10. If you could choose one aspect of this meeting to improve, what would it be?
    ____
    ____

MEETING EVALUATION SCALE

Meeting Evaluation Scale

- This offers eleven questions that examine the basics of a meeting. It is focused on participation, how conflict is handled and the clarity and openness of communication. It can be scored like the one described on page 12.

Meeting: ______________________________

Score each of the questions:
1 = Strongly disagree
2 = Disagree
3 = Undecided
4 = Agree
5 = Strongly agree

1. I was notified of this meeting in sufficient time to prepare for it.
   ____
2. I understood why the meeting was being held and what specific outcomes were expected.
   ____
3. I understood what was expected of me as a participant and what was expected of other participants.
   ____
4. I understood how the meeting was intended to flow and when it would end.
   ____
5. Most participants listened to each other.
   ____
6. Most participants expressed themselves openly, honestly and directly.
   ____
7. Agreements were explicit and clear, and conflicts were openly explored and constructively managed.
   ____
8. The meeting generally proceeded as intended and achieved its intended purpose.
   ____
9. My participation contributed to the outcomes achieved by the meeting.
   ____
10. Overall, I am satisified with this meeting and I feel my time here has been well spent.
    ____
11. At the start of this meeting, I understood its purpose and agenda.
    ____

LEADING MEETINGS

TEAM NEEDS

Team Needs

The leader responds to the needs of the team and is responsible for leading the development of a group into a team. The needs or characteristics that distinguish a team from a group are as follows:

- **Interdependence** — Each member plays a necessary role.
- **Common Goal** — Each member knows the team direction.
- **Choice of Direction** — The team has some control over its action.
- **Commitment** — The team members are committed to the task and to each other.
- **Action** — The team carries out its plans.

Here are some examples of how characteristics translate team member responsibilities:

Effective leaders and team members:

- Initiate tasks
- Encourage participation
- Provide needed information, opinions
- Give feedback, gatekeep
- Clarify goals, interpret ideas, study alternatives
- Set group standards, observe what's happening in the group
- Reality test options, facilitate decisions
- Combine ideas, contribute to synergy
- Expedite implementation of task or plan
- Learn, develop new capabilities

LEADING MEETINGS

THE LEADER

Values of Effective Leadership
Leaders, those who respond to the needs of their team members, behave in particular ways. Five basic values seem to underlie all of their actions, whether they are facilitating tasks or supporting the interpersonal relations in the group. An effective leader:

- **Leads by example**
- **Focuses on behavior**
- **Values others**
- **Builds constructive relationships**
- **Makes things better**

Effective leaders exemplify all of these interrelated values. Although no single set of "how to's" can fully describe how to act out these values, they offer a basis against which a leader can choose specific actions. As a leader you can ask yourself:

"Am I acting the way that I want others to act?"

"In my behavior, I look at the facts, or do I generalize?"

"Do my actions communicate that I value your contribution?"

"Can I help you without taking over your responsibility?"

"Is there an opportunity for all to benefit from this change?"

Some examples of translating these values into actions are:

- Developing and following meeting agendas
- Completing action items and tasks on schedule
- Following the problem solving process
- Listening to team members and allowing everyone to participate
- Inviting differences of opinion and then encourage joint problem solving to a mutual goal
- Focusing on how behaviors of team members impact the team's goals
- Giving sincere praise to individuals and to the team for the completion of tasks
- Encouraging the taking of risks
- Working to understand the emotions of team members during times of change and/or conflict
- Constantly focusing attention on the team's goal

LEADING MEETINGS

MANAGING DECISIONS

Decision Making Styles

There are alternative styles that a leader can use in guiding decision making in a team setting. Four that are typically used are:

- **Command** — Leader makes the decision alone.
- **Consult** — Leader gathers input from others, then makes the decision.
- **Majority** — Group members are polled for their opinions. The majority opinion becomes the group decision.
- **Consensus** — Everyone in the group discusses the subject, arriving at a decision that all members can support. A consensus decision does not have to be unanimous, but all members must be able to live with and agree to fully support the choice.

When making decisions that are significant and/or that require everyone's support, it is important to consider discussing and working through all the aspects of an issue to arrive at consensus. Since all decisions are not equally important, it can be useful to ask yourself — and your team — some questions before automatically choosing a decision making style:

''How critical is this decision to the success of our project?''

''How important is it that everyone on the team fully support this decision?''

''Do we need to talk about the issues involved to collect more information before deciding?''

''How much time do we have available to make this decision?''

Very early in a team's life it is important to work through decisions together to build trust. Once you've established a good working relationship though, you should begin choosing a style that is appropriate to the decision being made.

LEADING MEETINGS

MANAGING DIFFERENCES

Often when a team is making decisions that involve complex or highly charged issues, differences arise. It is important to remember that differences are not bad — they can lead you to look at an issue more thoroughly, to consider more options and arrive at a more effective decision. While differences aren't inherently bad, problems can arise if they aren't managed appropriately.

The following are some areas to consider in managing differences:

Identify Differences

- Listen carefully to diagnose what's going on.
- Ask questions to clarify areas of agreement or disagreement.
- Check in frequently with the team; (quiet members are often quiet for a reason).

Analyze the Differences

- Once differences arise, list the various options on a flip chart. Listing them on a chart makes them just ideas, not the conflicting opinions of specific individuals.
- Look at and analyze the ideas. Explore where similarities exist, instead of just concentrating on how far apart you are.
- Consider alternatives. Often you can merge some of the options to create a new alternative.

Make the Decision

- Avoid getting stuck in the discussion phase. Move on to a decision point.
- In choosing an alternative it is important to ask: *"Will this choice help us to achieve our team's goal?"* If a decision does not support the team improvement goal, it should probably be questioned and another alternative considered.
- In some cases, you as the leader may have to use the command or consult decision making style to avoid getting completely bogged down. If you must do this, it is important to explain the rationale behind your decision so that all understand why you made the choice.

Implement the Decision

- Once you've decided, move on! Don't allow yourselves to blame and second guess; make an agreement to support the decision and move on to the next activity.