

Managing Great Staff & Team Meetings

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Agenda

- Why do we have meetings?
- Reasons meetings “go bad”
- General strategies for effective meetings
 - Planning an effective meeting
 - Running an effective meeting
 - Planning for follow up and follow through
- A Recommended Exercise

Why Meetings?

- When managed properly, a critical mechanism for long-term business success
 - The best tool for making informed decisions within and across teams & department areas
 - Allows multi-person teams to plan and manage important projects more effectively
 - Good for efficient distribution of work assignments among team members
- . . . But very often become expensive productivity killers

Why do meetings “go bad”?

Signs you may be in an “Off the Rails” Meeting

- There's no agenda and/or no clear meeting leader
- If there is an agenda, it isn't followed
- Attendees cannot state clearly why the meeting is taking place (lack of clear goals/vision/purpose)
- There are unnecessary people attending the meeting
- People arrive late and leave early
- The meeting is interrupted by visitors/phone calls/people checking email/reading/other distractions
- The meeting degrades into a non-constructive “complaint” session

A Tale of Two Meeting Leaders

Why do bad meetings happen?

- More often than not, lack of upfront planning and preparation can doom a meeting before it even starts
- Personalities can contribute, but planning can help manage that too

“When the eagles are silent,
the parrots begin to jabber.”

– Sir Winston Churchill

Two Common Meeting Myths

- Meetings are FREE!
- Meetings are always a waste of time. Why bother?

A Sample Meeting Cost/ Value Calculation

Start with the amount of time spent in meeting
in hours. Multiply by:

Senior Staff @ \$75/hr = _____

Mid-Managers/Professionals @ \$45/hr = _____

Jr. Mgrs./Admin. Staff @ \$30/hr = _____

+ cost of materials, snacks, beverages,
room rental, electronic/telecomm, etc. = _____

= TOTAL COST OF MEETING: _____

Remember – it is MORE than just the cost of time!

Back to Our Two Leaders

As a meeting leader, you are “on stage”

- Perhaps no better place to show your competence and capability
- Also, no better place to show your weaknesses
- Can build (or damage) team loyalty/unity
- Can enhance (or destroy) top management support, as well as belief in you personally

A Best Practice

- Put lots of care into his meetings
- Never entered without a plan
- Always gave advance notice – often personal
- Had snacks and coffee; room had supplies
- Kept time and agenda under control
- Was VERY smart – knew how much it benefited him

“Lots of folks confuse bad management with destiny.”

– Kin Hubbard

General Strategies for Effective Meetings

First Question: What kind of meeting is it?

- A meeting where the existing problem, issue, or opportunity is clearly understood and solutions should be relatively self-evident?
- A meeting where the problem, issue, or opportunity is not well understood?
- A meeting where you need to generate ideas to take advantage of emerging issues or opportunities (a brainstorm session)?

Let's focus on the 2nd type of meeting first – “Situation Unclear”

- A meeting where the problem, issue, or opportunity is not well understood
- Primary goal of this meeting is to get to a deeper understanding of the situation, so that appropriate solutions can be developed

Get the Right People in the Room

- This is a good tip for any meeting type!
- In this case, you want those most likely to help get an understanding of the problem/issue/situation
- Diversity many help – age, experience, education, gender, ethnicity – etc.
 - Brings lots of different viewpoints to table
 - ... but may meeting take longer!

Advance Research Might Help

- Before holding meeting, assign advance homework/research/intelligence gathering to attendees
- Goal is to get smart about what is happening!
- And then bring that info into the meeting
- Of course, the meeting may bring up the need to gather more info, and vice versa – may require iterations to reach consensus
- Once team has confidence, the meeting changes ...

... Into a “Solutions” Meeting

- Now, that the problem/situation is clear, it is time to respond ...

Option 1:

Do You Even Need a Meeting (or Need to Attend the Meeting?)

- Remember, most people would rather not attend a meeting -- they have work to do!
- Need a tangible business reason for holding any and every meeting
- Purpose needs to be clear
- Expected outcomes should be anticipated
- If they are clear and obvious – just assign the work!

Sort of funny ...

*“I just attended another meeting
that could have been handled
by an e-mail.”*

When Asked to Attend

- Ask to see agenda first
- Ask “why” if attendance reason not clear
- Meeting attendees should be:
 - Meeting leader
 - Referent expert
 - Task managers
 - Possibly a record keeper/timekeeper
- Final fun tip on meeting start times

Step 1: Plan the Meeting

- What is the purpose of the meeting?
- Who will lead the meeting?
- Is there a defined, well-planned agenda?
- Is there a set start and **end** time?
- Have the right people been invited and confirmed?
- Do they all know why they are attending and what information or expertise they are expected to bring?
- Have they been given adequate time to prepare?
- Have you as meeting leader given yourself time to prepare your thoughts/plans for the meeting?

The Three “D’s” of an Effective Meeting

- “Solutions” Meetings simply are a place where work should be:
 - Discussed
 - Decided
 - Distributed

Step 2: Distribute the Agenda EARLY

- Forces the planning to be completed early
- Shows participants meeting is serious, professional
- Participants know what to expect
- Also have time to prepare
- Best if you can identify & notify expected topic speakers in advance
- Can distribute “ground rules” in cover note (on time start, smart phones silenced, etc.)

Sample Meeting Agenda

Sample Meeting Agenda

Dean and Associates, LLC
Finance Team Meeting
5/10/2008 9:33 – 10:15 a.m.
Rouge Room (3rd Floor, East Wing)

Attending: Dean, Smith, Johnson, Baker, Wills, James, Jacobs

Meeting Purpose: To discuss implications of latest financial projections and how this will impact investment in new sales initiatives

Desired Outcome: To revise cost model of sales initiatives in light of current financial status

1. Call to Order – Introduction of New Team Members (Dean) 9:33 – 9:40
2. Discussion of Latest Finance Projections (Dean, Smith) 9:40 – 9:50
3. Implications for Sales Team Efforts (Johnson, Smith, Baker) 9:50 – 10:05
4. (If Time Available) New Financial Analysis Model Expo (Wills, Jacobs) 10:05 – 10:12
5. Meeting Close – Schedule Next Team Meeting (Dean) 10:12 – 10:15

Welcome to the team Steve James and Sarah Jacobs!

Step 3: Manage the Meeting

- Are the right people (and only the right people) in attendance?
- Have ground rules been set for attendees (late arrivers, “rabbit trailers”, phone callers, typists, interrupters, side conversations, etc.)
 - Create a formal “Meeting Etiquette” document?
- Has an agenda manager/timekeeper been assigned?
- *An interesting fact about sticking to agendas*
- Run the meeting

A Funny but True Story

To Run a Good Meeting, Get Down to Bullets

- Agreements/Consensus
- Additional Discovery
- Assigned Deliverables & Due Dates

- REMEMBER the Three D's!

Keeping Attendees “Effectively” Participating

- Conflict, distraction, and personality are leading causes of unproductive meetings
- Ground rules help reduce distraction
- Anticipate emotional response and prepare
 - Advance communications – no surprises!
 - Individual discussion with those invested
- Some conflict is healthy/expected
 - Challenging leader/participants is OK; arguing is not
 - Sarcasm, harsh criticism, aloofness, cynicism not welcome
 - make aware and get back to task
- “Cooling Off” period & reconvene

A Quick Discussion on Adult Learning & Retention

- 45-minute attention rule
- Utilize “discontiguous” activities to maintain attention/retention
 - Multiple Speakers
 - Breaks
 - Demonstrations
 - Group/Partner Activities
 - Open Discussion

Step 4: Ending the Meeting

- Check that all agenda points have been properly covered
- Query for consensus/resolution/ understanding from attendees
 - Possible smaller group breakouts?
 - Avoid e-mail “downloading” – not as efficient as formal or informal “huddles” or even phone conversations
- Have attendees received assignments with deliverables and due dates at the end of each meeting?
- Have specific notes from meeting been shared with attendees post-meeting?
- Ask for meeting feedback

Closing the Loop

- Responsibility of meeting leader to make sure follow-up document provided
- Also responsible for providing any post-meeting information/status changes as appropriate
- Finally, responsible for verifying action items completed by individual task masters
- Individual task masters also share this responsibility – works best as a “team” effort
- Share completions with meeting leader only?

Sample Meeting Follow-Up Document

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Attending: Dean, Smith, Johnson, Baker, Wills, James, Jacobs

Meeting Purpose: To discuss implications of latest financial projections and how this will impact investment in new sales initiatives

Desired Outcome: To revise cost model of sales initiatives in light of current financial status

Discussion:

1. Finance team shared that sales numbers and net profit were down in 1 & 2Q '08.
2. Sales initiatives were coming in more costly than projected.
3. Top management expressed desire for more cost effective sales efforts with greater ROI
4. Sales team members shared 2-3 ideas for correcting current issues

Actions:

1. Sales team to switch secondary documents to 2-color printing from 4 (Wills – 5/31)
2. Sales team to invest more money into web development, which is providing greater ROI.
Team to provide new web site enhancement model by 5/24 (Johnson, Baker)
3. Sales team to cut back on costly conference/sponsorship support, in lieu of web (Jacobs 5/24)
4. Dean & Smith to report to top management on results of meeting discussion by 5/14

The “One Minute Manager” Model

- Short, impromptu meetings often more productive than planned formal meetings
 - Usually happen due to arising opportunity / crisis / change
 - Get 2-4 active people together quickly
 - Huddle on new information
 - Adjust plans according to information
 - Make plan for quick follow up
 - Take ACTION!
- Reference: “The One Minute Manager” by Ken Blanchard & Spencer Johnson

A Recommended Exercise: Meeting Ground Rules

Common Courtesy

- Come prepared
- Remain professional – control emotions
- Contribute
- LISTEN!
- Respect other opinions
- Avoid personal work, interruptions, phone calls, tardiness, side discussions
- Table emerging topics for post-meeting discussions – try to stay on topic/plan
- Help the leader – stay on agenda
- Play Nice!!

Now, let's have some fun ...

The “Mind Map” System for a Brainstorm Meeting

Final Thoughts:

- Meetings can be a great tool for business achievement and success ...
- Or a great waste of time and staff resources
- Proper planning is the key; proper execution is the tool
- Keep learning and improving – seek progress, not perfection!
- Just like anything else in life and business, well planned and well executed meetings deliver the most value for the company and the employee

Other Randy Dean Programs:

- ***Taming the E-mail Beast:*** Key Strategies for Managing E-mail & Info Overload
- Finding an Extra Hour Every Day: Time Management Strategies for Busy Managers, Leaders & Professionals)
- *Optimizing Your MS Outlook*
- *Time Management in “The Cloud” Using Gmail/Google Productivity Tools*
- *Smart Phone Success & Terrific Tablets:* Getting More Productivity (and Fun) From Your Devices
- Go to www.randalldean.com/programs.html

We're Done!!!

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