Meeting for Results

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Icebreaker

- Name
- Division
- Department
- Position
- What is the most challenging aspect of meetings for you? (Planning, Conducting, Follow-Up)
- What would you like to learn today?
Sample Materials in Handbook

- Meeting Planning Worksheet
- Meeting Preparation Checklist
- Ground rules
  - Parliamentary Procedure Overview
  - Department Covenant
- Minutes
- Action Plan
- Evaluation
- Articles
- Bibliography
Types of Meetings

• **Face to Face**
  – One on one
  – Group*

• **Virtual**
  – Video conferences
  – Chat groups
  – Conference Phone Calls
The Six P’s of Effective Meetings

• Purpose
• Participants
• Place
• Plan the Process
• People Dynamics
The Six P’s of Effective Meetings

- **Purpose**
  - Decide the objective or outcomes
  - Determine if a meeting must be held
- **Participants**
  - Identify individuals who will best contribute to the objective or outcome
- **Place**
  - Identify room and seat configuration most conducive to achieving your goal
The Six P’s of Effective Meetings

• **Plan the Process**
  – Identify elements and components that will support success
  – Prepare the agenda and other planning tools
  – Summarize accomplishments

• **People Dynamics**
  – Involve staff
  – Encourage involvement
  – Handle people dynamics
Meeting Process Flowchart

Purpose

Participants, Place

Plan the Process

People Dynamics
Purpose

What are some of the purposes of meetings?
Purpose

• Generate ideas
• Discuss pros and cons of proposals
• Discussion necessary at multiple levels of organization
• Share information, ideas, perspectives, experience
• Identify and resolve problems
• Do planning
• Coordinate efforts
• Discuss issues and make decisions
• Build community
• Clean the air
Benefits of Meetings

- Set objectives
- Allocate resources
- Make decisions
- Schedule components of complex projects
- Discuss project progress
Categories of Group Meetings

• Information Sharing
  – Members share gathered information or report status on group of individual progress.

• Information Dissemination
  – Critical information shared with members.
    • Time allotted for questions

• Problem Solving/Decision Making
  – Requires full participation and more time
  – May include subject matter experts

• Symbolic/Social
  – Celebrate a special event or share recognition
Big Questions to Ask

• Should we meet? “Is a meeting necessary to achieve the results I want?”
  – Is information straightforward enough to be disseminated by memo?

• Do all the participants need to be present or would a smaller group be sufficient?

• Will the meeting produce worthwhile results.

• What do you want attendees to think, do, or feel as a result of this meeting?
Meeting Process Flowchart

1. Purpose
2. Participants, Place
3. Plan the Process
4. People Dynamics
Participants

• Invite those who can best contribute to the objective.
  – those who have a stake in the outcome or who own the problem
  – problem solvers and idea people

• Consider skills, knowledge base, and background of participants
  – subject matter experts
  – balance of task- and process-oriented members
Participants

• Considerations
  – Organizational politics
  – Roles needed
    • Facilitator
    • Recorder
    • Timekeeper
  – Need for objectivity
  – Potential for problems
Number of Participants

• Determine appropriate size and composition
  – Number is based on objective
  – Information sharing with video/brochure - 40 is ok
  – Generate ideas: optimal size 5-7 with no more than 10
    • Break large group into several small groups of 5-7
Place

• Choose location and room based on the purpose of the meeting and number of participants.

• Organize the Meeting Room
  – Consider Seating Arrangements
    • Enable eye contact with each person in the group
  – Check availability of equipment and resources (whiteboard, space for flip charts)
Seating for Topical Meetings, Conferences vs. Presentation
Seating Arrangements

Sample Seating Arrangements

1. Round table with facilitator and easel in the center.
2. Rectangular table with facilitator and easel on opposite sides.
3. U-shaped table with facilitator in the middle.
4. Circle table with facilitator and easel in the center.

Screen

Facilitator

Easel
Meeting Process Flowchart

1. Purpose
2. Participants, Place,
3. Plan the Process
4. People Dynamics
Process Plan Overview

- Identify the appropriate people and place
- Develop Agenda Topics and Outcomes
  - Decide on a clear achievable task
- Consider Activities
  - Icebreakers
  - Interactive exercises
- Distribute Agenda
- Manage People Dynamics
- Summarize
Dedicating Appropriate Time to Plan

Direct Correlation between Preparation Time and Meeting Productivity

Planning the Agenda

• **List topics in order of importance**
  – Think about your objectives for each topic
  – Include issues to be followed up from previous meetings

• **View agenda items as opportunities to develop staff and improve performance rather than issues to cover**

• **Allocate appropriate time for each topic**
  – Reduce number of topics if necessary
  – Allow time for questions following each topic
Sample Agenda

• Start and End Time
• Location

• **Stage 1 (# of minutes)**
• Clarify Objective
• Agenda overview, vision and goal clarification
• Introduction of members
Sample Agenda

- **Stage 2 (# of minutes)**
- **Review of last meeting’s minutes**
- **Review of roles for today’s meeting**
  - Facilitator
  - Time keeper
  - Scribe
  - Other
- **Set ground rules or operating guidelines**
- **Continuing business**
  - Progress reports from committees, etc.
- **New business**
  - Information to be shared
  - Decisions to be made
Sample Agenda

• Stage 3 (# of minutes)
• Review accomplishments
• Summarize

• Stage 4 (# of minutes)
• Process check
• Preparation for the next meeting
  – Action items
  – Roles, next agenda
  – Time and place verification

• Future meeting
Communicate Goals

– Distribute agenda with clear goals prior to the meeting.
– Assign a pre-meeting task if appropriate.
– Ask for agenda suggestions if appropriate.
– Meet or consult with some participants one-on-one before the meeting, if appropriate.
Why Icebreakers

- Introduce new members to the old guard and vice versa
- Encourage cohesiveness
- Diffuse negative energy or tension
- Energize the group
Pre-Meeting Setup

- Minimize distractions
  - Have all materials and notes laid out
- Arrive early to organize notes and put up visual aids
Process Overview

• Articulate meeting purpose and objectives.
• Communicate a clear achievable task.
• Explain why participants were selected and invited.
• Allow members to introduce themselves and their departments.
• If time permits and appropriate, do an icebreaker.
Process Overview

• Establish ground rules
  – Include decision-making process
• Proceed with general overview of the agenda
• Review past progress
• Use visuals (flipchart or board) and denote progress and ideas
• Summarize accomplishments and review assignments
Example 1 of Ground Rules

• We will use an agenda, time keeper, and meeting leader for each meeting.

• Meetings will start on time (with a review of the agenda) and end on time (with a process check), unless there is team consensus to extend it.

• Team members who have been absent or tardy must take measures to “get up to speed.”

• Team members will practice active listening.

• Team members will value both task- and process-oriented approaches.

continued
Example 2 Ground Rules

- It is OK to talk about/address the inappropriate use of power by team members.
- A time-out can be called if the meeting is off track or otherwise ineffective.
- Items identified as sensitive will be kept confidential.
- Silence by team members indicates a need for further inquiry.
- The meeting’s facilitator should remain neutral but may formally step out of the role to contribute to the discussion.
Parliamentary Procedure

- Robert’s Rules of Order
  - Fixed order of business
  - Members express opinions in the form of moving motions
    - Make a motion “I move that we...”
    - Wait for second
    - Chair: “It has been moved and seconded that we...”
    - Mover speak in favor of motion at this point
    - Comments and debate directed to chair
    - Chair asks: “Are you ready to vote on the question?”
  - Vote by raise of hands, voice, roll call, general consent, ballot
Summary of Accomplishments

• Recording and Reviewing
  – Track key issues covered in the meeting
    • Enables you to check the accuracy of your own perceptions
    • Helps ensure everyone has the same understanding of any actions discussed
    • Helps ensure the group’s commitment to any action agreed upon

• Wrap Up
  – Review Decisions, Action items, Assignments
  – Summarize key points discussed
Sample of Effective Meeting Follow-Up Action Items

Sherman, Marian

Subject: Excel User Group
Location: CP-301
Start: Wed 8/18/2010 9:00 AM
End: Wed 8/18/2010 10:00 AM
Show Time As: Tentative
Recurrence: (none)
Meeting Status: Not yet responded
Required Attendees: CP-301C Conference Room.; Wearda, Jodie; Sherman, Marian; Pape, Dana; Sweet, Greg

Note the change in location to CP-301. Thanks.

Action Items:

Dana
• Take lead on preparing Power Point Presentation (as discussed in meeting today)

Greg
• Take lead on preparing Tips & Tricks Takeaway

Jodie
• Reserve room for meeting (Stretch Hall)
• Identify time for meeting (Sept 2010)
• Ensure room has a projector and computer available for use.
• Market meeting to Plant employees

Marian
• Take lead on preparing Evaluation

Suchi
• Take lead on preparing Setting up DL (excelusergroup@fullerton.edu)
• Take lead on creating a Sign In Sheet for day of meeting
• Take notes and coordinate meeting notices, etc. 😊
Evaluation and Closing Remarks

• Was the objective accomplished?
  – What went well?
  – What can we do better next time?

• Discuss what’s next
  – Identify some agenda items for next meeting

• Review Action Items
  – Was sufficient time allotted for actions to be accomplished?
  – Are there resources that need to be made available to the actionee?
After and Between Meetings

- Prepare minutes or summary of key points and decisions.
- Ask participants to review for accuracy.
- Offer support resources for actionees such as who they may contact or where they might get information.
- Send out checkpoint emails.
- Use time between meeting to individually meet to ensure clarity and commitment to goals.
- Keep stakeholders informed of team progress and setbacks.
- Prepare next meeting agenda and distribute in advance.
Meeting Process Flowchart

1. Purpose
2. Participants, Place, Planning
3. Process
4. People Dynamics
People Dynamics

- Benefits of providing a venue for interaction
- Activities to encourage involvement
- How to handle challenges
Benefits of Creating an Environment
the Encourages Interaction

• Shows staff you value their ideas and suggestions
• Reinforces their value as part of the team
• Generates ideas from individuals to benefit the team
• Encourages commitment to decisions made
• Develops a better understanding of staff as individuals and the opportunities and challenges they face on the job
Involve Staff

• Four Key Behaviors
  – Whenever possible, ask, don’t tell
  – Don’t accept criticisms or complaints without suggested solutions
  – Focus on the issue – don’t attack the person
  – Always look for opportunities to reinforce
    • Listen carefully
    • Maintain eye contract and nod to show approval or understanding
    • Emphasize what an individual has said by repeating it to the group
    • Acknowledge the individual by giving simple but appropriate verbal praise
Meeting Activities to Encourage Involvement

• **Brainstorming**
  – Solicit and list ideas on a display board
  – Once all ideas are listed, discuss one by one
  – Identify best ones

• **Written Activities**
  – Encourage more thoughtful suggestions
  – Retrieve written ideas for future meeting

• **Other Activities**
  – Invite “experts” to share information
  – Request staff reports on specific areas
  – Arrange for topic demonstrations
  – Think Pair Share
  – Assign Pre-meeting work
  – Include Visual Aids
Meeting Challenges

• Top 3 reasons for failed meetings
  – Participants get off subject
  – Meeting lacks agenda or goal
  – Meetings last too long

• Work becomes more complicated when you interact with others
  – Work styles vary in terms of:
    • Personality, preferences, values, and attitudes
    • Approach to analysis, critiquing style
  – Consensus decision-making is time consuming
Handle People Dynamics

• No volunteers?
  – Ask a specific person for input
  – Prompt the group by offering “thought-starters”

• Dominant Individual
  – Ask a specific person for input
  – Speak to the dominant individual privately

• Quiet or Withdrawn Individual
  – Ask specifically for their input
  – Reinforce them at every opportunity to develop their confidence

• Negative Individual
  – Don’t accept criticisms or complaints without suggested solutions
  – Encourage the group to focus on the benefits first and think in positive terms

• Group “attacking” the individual
  – Step in and mediate so that individuals do get the opportunity to put their views across
Tips

• Keep internal meetings to 30 minutes forcing members to be prepared and focused.
• Announce adjournment time right when the meeting starts. Participants will know they need to focus and adjust their comments to fit the schedule.
• Complete and distribute meeting summary the same day.
• Demonstrate management support and commitment to the team and its tasks.
• Have fun!!!
Conclusion

• Staff meetings are an integral part of most organizations.
  – Can provide a forum for development and productivity improvement for all your staff
    • Forum for recognition
    • Forum to motivate and encourage

• Decisions are made.
• Synergy is realized.
• Networks are established.
Questions???