MS Class – Week 1 Term 3 – January 2016 "Effective Meetings 2016 Overview"

This lesson gives some guidelines to facilitators about how to have more effective meetings. But first what are the expectations of people who attend my workshops on "Effective Meetings".

Question: What are some points that make meeting bad? In other words, what sort of things go wrong at meetings? Below are some points that can make a meeting not so productive. In other words, here are some points that can potentially ruin a meeting.

1. Lateness
2. Absent
3. No agenda
4. Straying from the point
5. Everyone talks
6. No one talks
7. No roles assigned
8. Incorrect/no time keeping
9. Minute taker assigned ½ way through
10. Chair not taking control
11. No actions
12. Outstanding actions from the previous meeting
13. To much time on other issues
14. No communication after meeting
15. Not enthusiastic, bored
16. No sick notes / no reason
17. Criticism
18. No objectives (defined)
19. Not prepared haven't read the agenda
20. Rotation of members
21. Lack of planning
22. Misunderstandings / wrong expectations
23. No progress
24. Undefined roles
25. People interrupting / mobile phones
26. People getting cross
27. No one in charge

Yes, a long list!

So what to do?

As always it is where one starts from that counts! This is where the team facilitator needs to make an intervention into the situation. The basis of the intervention is to offer to facilitate the team to improve its meeting process.

Every meeting is a process with 3 phases each can be improved.

Phase 1: Before the meeting

Do not have a meeting unless it is necessary. be clear about the purpose of the meeting and what the expected outcomes, no matter how vague in the first place. Make sure the right people are invited to participate. Decide what methods will be used to accomplish the meeting's purpose, what techniques will be used for example will a rigorous methodology such as the Lean Six Sigma DMAIC methodology be used or will other simpler or subsets of the DMAIC toolbox be used, or perhaps none of the above applies and a simple discussion applies. Whatever happens be prepared. The last thing you need to do is waste people's time with a poorly planned meeting.

Create a Proposed Agenda which is a plan or map for the meeting. The purpose of the agenda is improve meeting efficiency and to improve the likelihood of achieving outcomes.

A good Agenda will have the following information:

- The purpose of the meeting,
- The topics to be discussed,
- Who will lead the discussion on each topic,
- The methods by which the topic will be addressed and what the outcome will be in relation to the topic,
- The time allocated to each topic should be clear.

How many times have you been invited to a meeting where you have little or no idea of what the expected outcome/s of the meeting is. Agendas written with single words are not very helpful and serve only to illustrate how poorly the meeting has been planned.

Effective meetings do not happen by accident, they are planned!

The Agenda should be sent to the participants early and in good time and it should be possible for the meeting participants to change the agenda

Phase 2: Conduct the Meeting

Start with a "warm-up" which is a quick, round the group sharing of ideas, issues or information at the beginning of a meeting. There are many different formats of these to be found in books. Don't use the same one all the time. The purpose of these is; To break the ice, Get everyone talking, Focus attention on the meeting, To give people to share their person agendas and needs etc… Do not let the "warm up" be too long.

The leader of the meeting should quickly review the agenda, Remind people of the ground rules for the meeting if already agreed, if not then agree a set of ground rules.

Ground Rules are agreements about group and team behaviors, not regulations that hamper creativity and spontaneity.

The purpose of ground rules is to improve the group/team's effectiveness and efficiency and avoid common problems.

Agree the "ground rules" during the first few meetings of the group/team. Review the ground rules from time to time and change them is necessary by consensus and not dictate!

Some **ground rule** examples are:

Attendance, Promptness, Equal opportunity to participate, Interruptions, Assignments, Role assignments, Decision-making methods, Confidentiality, Meeting evaluation method, Chronic violations of ground rules

The roles and responsibilities of various participants should be agreed, if necessary the facilitator may need to assist with this task. Try to share this task by rotating the role among the participants. Resist the temptation to "punish the good"

So far I have dealt with Getting Started in the meeting so now we Conducting the meeting. Conducting a meeting steps are shown in the process flow diagram and are fairly self-explanatory. However what is the facilitator's role and contribution?

The facilitator can

- Establish the pace of the meeting
- Work with the scribe to maintain focus of the discussion
- Ensure that participation and access to the discussion is managed
- Checks decisions; Group/Team decisions are often implicit and so to prevent mistakes he/she states the decisions in full sentences and checks that all participants interpret the sentence in the same way.
- Ensures clear closure to discussions to help keep track of where the group/team is on the agenda
- Make suggestions about the agenda order, for example changing the order of the agenda topics so that shorter topics are dealt with early so that the reinforcement of accomplishment is felt by the team/group

Closing the Meeting

The steps in this part of the meeting process are shown in the Meeting Process Flow Diagram above.

However this is the point at which some meetings break up in with the potential to do a great deal of damage and lose the benefit of what has already been accomplished in earlier parts of the meeting. So it is vital that the facilitator takes all possible steps to ensure this part of the meeting process takes place properly and is not rushed! If necessary start to finsih the meeting so that this part "Closing the Meeting" can take place with all due care and attention.

The person writing the notes/minutes of the meeting should be asked to read back to the group/team the Agreed Action items: What needs to be done, by whom, By when. These notes need to be corrected on the spot by the group/team before everyone leaves. It is not fair or indeed good practices to leave it to the note taker to invent the minutes after the meeting.

Agree the agenda for the next meeting in the same format as for the current meeting so that it can be published with the minutes of the current meeting.

Evaluate the current meeting in such a manner that is private to the group/team. The group/team can decide who to share the feedback with. The meeting evaluation is usually not for for publication and should be conducted by the facilitator in the early stages until the team/group gets the hang of doing this. A flip-chart with three headings is a very useful and practical method which I have used for years. Asking the team to record its members views under the three key headings.
The tree headings are:

1. What will we **Stop** doing in our meeting?
2. What will we **Start** doing in our meeting?
3. What will we **Continue** doing in our meeting?

At the start of the next meeting this list made on the group/team flip-chart can be reviewed to remind members! This serves to improve the meeting process over time as the team becomes more mature and group dynamics works it effect on the team.

In very long meetings a mid-meeting evaluation can identify improvements.

The Roles of the various players

The Facilitator

A facilitator aims to make the group/team's work easier.

He/she is responsible for ensuring that the group/team:

- Cover one agenda item at a time
- Establish an appropriate pace
- Opens discussions
- Maintain the focus of discussions
- Manage participation
- Check decisions
- Close discussions

Some notes on facilitators

- Must be focused on the team goals not his own!
- Pays attention to key meeting characteristics
- How well the meeting is going, cannot pay as much attention to the content. If the facilitator needs to get involved deeply, then they need to ask someone else to facilitate that part of the meeting.
- Because of the power and authority considerations it is not recommended that the team leader also facilitate team meetings
- Not accountable for the group's output
- Is responsible for helping meetings accomplish team/group's role
- The role can rotate
- Decides with team leader how to work together

The Scribe

The scribe post key ideas so that everyone can see them as the discussion unfolds in the meeting. This can be on a flip-chart or on an projector screen or even on a “Go to a Meeting” type device. The key thing is it that the key idea under discussion is posted so that everyone in the meeting can see it. Even when virtual meetings are taking place.

The scribe is responsible for:

- Writing large enough so that all can see
- Abbreviating discussion points when possible
- Checking to see if ideas have been caught accurately
- Summarizing decisions in full sentences
- Getting input on wording from the group/team

The scribe and facilitator should work closely together; The facilitator checks to see that the scribe has captured key ideas for the group/team, the scribe asks the group to pause (e.g. word decision) and helps facilitator clarify

The role of scribe and facilitator can be combined but beware of the power of the PEN

Lots of Power can be concentrated, especially if the Team Leader is the Facilitator and the Scribe!

The Timekeeper

The timekeeper helps the group/team keep track of time during the meeting. The objective is not to police rigidly the time limits rather to allow the team decide how to use the time it has for their meeting.

The time keeper is responsible for:

- Keeping an accurate tack of time during the meeting
- Giving the team/group a warning when the time allocated for an agenda topic is almost up, so that the group/team can decide whether to move toward closure on the topic , or to continue the discussion and change the remainder of the agenda.
- Signaling when time is up.

This role seems easy at first glance but in the heat of the battle of a meeting the timekeeper is as likely to lose track of time too. After all they too are part of the group/team. They need to be able to interrupt the proceedings of the meeting without fear of reprisal or ridicule. Again the facilitator may need to make an intervention here.

The Note-taker – may also be called the Minute-taker

The Note-taker captures and documents the meeting for a permanent record

The Note-taker is responsible for:

- Keeping meeting minutes using an agreed format
- Checking with the group/team for accuracy of the minutes
- Producing the minutes and seeing that the minutes are published in a timely manner.

The output of the Note-taker role provides:

- A permanent important record because it reminds team members of action items they are responsible for.
- It provides the record of decisions made, key points of discussion and prevents rework by the team/group
- The notes/minutes serve as a basis for communicating with others outside the group/team
- A source for the group/team's memory
- A agreed format for a the one complete organized and maintained set of group/team minutes

The role is made easier if there is a scribe who works with a flip-chart

Meeting roles in reality

In **unskilled** groups/teams the meeting process is attended to only by the facilitator. The facilitator, scribe, timekeeper, and note-taker tend to work independently.

In skilled groups/teams all members help the team follow an effective process and off course the facilitator, scribe , timekeeper, and note-take work as a team.

To build meeting skills of the members rotate the roles, practice and give feedback to each other.

Phase 3: After the Meeting

It will have been a waste of everyone's time if after the meeting nothing happens. To prevent this some obvious activities take place.

Follow up the meeting by first writing and publishing the meeting minutes promptly. What does promptly look like – In my book within 24 hours or the finish of the meeting. Any later and people start to forget what they agreed. File the meeting agenda, minutes and other key documents in some location that is accessible to all group/team members, whether electronically or a filing cabinet, but not the note-taker's private filing cabinet that is locked.

Post the minutes on the group/team notice board if it exists. In many companies this is a way in which others outside the group/team can find out what is going on. This is part of the communications process. Teams working on Lean Six Sigma and Continuous improvement are not secret societies!

Off course the assignments need to be carried out by the members otherwise there meeting has been almost a waste. Off course failure to complete assignments will become evident at the next meeting and will come to light either as a specific topic or in the course of the meeting.

Ideally the team leader should be aware of the status of assignments before the next meeting but in some cases this may not be possible for a variety of reasons.

To this end a pre-meeting planning session should be organized between the facilitator and the team leader so that both are aware of what the outcomes of the next meeting should be. In some cases this can be a very short event but in others where there are problems with the team/group then a longer session can be expected. The purpose of this is to assist the team/group achieve its goal.

Good luck!