How To Run Effective Meetings

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An organization's culture comes to life in its meetings. At earlier stages of cultural development, meetings can be lifeless and ineffective. They can also suck the time and life out of your day, as this brief video shows. In more evolved cultures, however, meetings become collaborative events where important issues are debated, trust is built, decisions are made, alignment is created, and commitments are solidified. We outline here our best practices for holding effective and productive meetings. Engaging these practices is a proven way to grow an organization's culture.

Key Principles for Effective Meetings:

- The main purpose of meetings is to produce results that move the organization closer to its stated objectives. Results include making key decisions, getting everyone on the same page, and coordinating key activities (who does what by when). Meetings designed to inform (e.g. Town Hall meetings) should be few in number relative to meetings where decisions are made, since there are other effective ways to inform: memos, newsletters, etc. Therefore, determine if a meeting is truly necessary.
- Most meetings are framed around agenda topics to be discussed. However, a better way to organize a meeting is to frame the agenda around key questions to be answered. The meeting then concludes when the key questions are answered or when the time allotted for the meeting expires.
- All meetings start on time and either end on time or end early. The meeting's end time may be renegotiated during the meeting, when all participants agree.

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- All meetings have an agenda, which is circulated in draft form prior to the meeting, and is finalized and prioritized at the start of the meeting. Each agenda item is identified as an update, an item for discussion, or an item for decision. Assigning time slots for each item creates responsibility for managing time. Adding more time for an item not yet complete is negotiated.
- Only key decision-makers for the meeting's topics are invited and attend the meeting. Others who can support decision-making may also attend for specific meeting topics. In most cases, participants have the option to counteroffer the request to attend, especially when there's a time conflict, or the meeting's purpose is unclear, or the participant's role/contribution in the meeting is vague.
- Prior to meeting, participants prepare with relevant facts and information that support the meeting agenda and questions to be answered.
- Each meeting has several key roles. For small meetings or 1:1's, one person can fulfill multiple roles. For recurring meetings, the roles can be rotated.
  - Facilitator – starts the meeting on time, keeps conversations and discussions on topic, ensures that relevant voices are heard, requests bottom lining if the speaker is taking too long to get to the point.
  - Agenda Builder – prepares the agenda, identifies which participants need to attend, and circulates it with sufficient advance time so that participants can prepare.
  - Time Keeper – keeps time for each topic and the meeting in general. Signals 5 minutes prior to the meeting end time to begin the summary of key decisions and action items.
  - Note Taker – takes notes including people attending, unexcused late arrivals, decisions made, promises committed to and the conditions of satisfaction for each promise (who, by when, etc.). Shares summary of key decisions and action items 5 minutes before meeting end. Distributes notes at the end of the meeting.
  - Challenger – calls out violations of agreements, points out elephants in the room (like "unhealthy peace" where no one says what they really think), invites learning opportunities, etc.
- Meetings are a safe place for people to bring up issues, concerns, grievances and facts that impact decision-making. All participants have a duty to maintain that safety.
- A 10-minute break is provided, at a minimum, every 90 minutes, or more frequently, if agreed to.
- Effective meetings attend to ***both*** *interiors and exteriors*. Interiors refer to what you can't see but often have major impacts, like one's beliefs, attitudes, emotions and values. Look for and account for these. Exteriors are observable: what we say or do, and how. This includes behaviors and the structure of meetings, processes and systems. Both are always at play.

The Meeting Process:

- The Facilitator starts the meeting on time and, if not decided ahead of time, invites participants to take on the roles identified above.
- The Facilitator builds agreement around ways of working together, including the use of devices (cell phones, tablets, laptops, etc.), how interruptions (e.g., phone calls) are handled, listening with intentionality, etc.
- The Facilitator reads the meeting topics and key questions to be answered and creates alignment around agenda, prioritization of topics and timing for each item.
- The Facilitator manages the meeting based on the agenda items, agreed upon priorities, timing and decisions.

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- The Timekeeper uses a prominent timer, with an audible alarm, to time discussion topics.
- Completion of agenda items must include agreements on if and how information will be cascaded to other stakeholders.
- When the Facilitator declares the discussion is complete, the Notetaker reads a summary of key decisions and agreements.
- At the conclusion of the meeting, the meeting notes are distributed in whatever format works for the business.

Suggestions for Customizing Meetings:

- Reinforce "Early is on time and On-Time is late." Incentivize people to arrive early. The meeting minutes also identifies unexcused late arrivals, providing a built-in incentive.
- The Facilitator may *optionally* lead a brief, under 1-minute check-in. For example: asking participants on a scale from 1-10 to rate their energy level, presence, and focus.
- Meetings end with sufficient time to allow participants to freshen up and get to their next meeting. For example, the Facilitator ends a meeting by 8:50 AM to allow travel and preparation for a 9 AM meeting.

Additional Resources:

- Patrick Lencioni, in "Death by Meeting" suggests 4 types of meetings. Consider which of the following types of meeting you want to have:
  - Daily Check-in: Meet briefly to share daily schedules and activities. Do it standing up and keep it to 5-10 minutes and administrative in nature. Hold the meeting even if some people can't be there.
  - Weekly Tactical: Meet weekly to review activities and metrics and resolve tactical obstacles and issues. Meetings are typically 45-90 minutes in length and the agenda is set after the initial reporting. Do not discuss strategic issues in this meeting.
  - Monthly Strategic: Meet monthly (or ad hoc as required), to discuss, analyze, brainstorm and decide upon critical issues affecting long term success. Meetings are generally 2 to 4 hours in length and are limited to one or two topics. Advance preparation and research is required.
  - Quarterly Offsite Review: Meet every quarter offsite to review strategy, competitive landscape, industry trends, key personnel and team development. The meeting should be out of the office and focused on work, with limited social activities. It is important not to over-structure or over-burden the schedule.
- It's useful to follow a proven strategy for analyzing problems, either before or during meetings. One approach is:
  - Clearly and succinctly state the problem – agree on a clear and concise problem definition.
  - Identify the causes of the problem – list them out.
  - Identify the possible solutions
  - Identify the best possible solution – can be one or more of the above
  - Make requests/promises to implement the solution, with clear conditions of satisfaction.

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Quick Reference Cheat Sheet:

- What are the key questions that the meeting will answer? This frames the agenda.
- What is the length of the meeting? Allow for ending early if key questions are answered.
- Who needs to attend and for how long?
- Invite healthy conflict vs. unhealthy peace!
- Circulate an agenda in advance.
- Assign roles in the meeting (facilitator, agenda builder, time-keeper, note taker, challenger).
- Encourage/reward "early is on time and on time is late". Hold unexcused latecomers/absentees accountable.

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