*Meetings That Work!*

# Beginning

Middle

##  The envelope

##  Before, During, Near the End

## Roles

 Facilitator, Timekeeper, Recorder, Gatekeeper

* Points-of-view

 Devil’s Advocate, Cheerleader

 Big Picture, Details Moving Ahead, Staying Put

## Practical strategies

 Stay on task

 Shift focus

 Deal with the unexpected

# Dealing with Difficulties

### Dominator, Silent One, Fault Finder, Stonewaller, Tangent Taker, and others

# End

## Close-down

## Evaluation

## Next steps

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*Bibliography*

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 *The Meeting Envelope*

# In Advance

## Produce and circulate a draft of processes, topics, and times

Different processes call on different modes of attention. Be clear which process you need.

--Information sharing: These topics have standard forms (financial reports, minutes, updates of ongoing projects). Call out deviations from the expected. Make sure those reporting know how much time they have.

--Decisions, clarifications for decisions: These topics are generally the meatiest agenda topics and processes. Prepare any necessary advance research.

--Brainstorms, explorations: These processes provide opportunities to stimulate the collective creative energy of the group.

--Interpersonal processes: introducing a new group member, reestablishing a relationship after a breach, building coalitions, forming committees.

## Participants

Provide a means for absentees to get the information (have them contact you, not the other way around). If a key player cannot be present, arrange an alternative way to participate and inform the others (conference call, advance meeting, holding decisions, etc.). You may want to give non-participating attendees an opportunity to contribute.

## Setting

Check the physical set-up for ventilation, temperature, seating, refreshments, name-tags, etc. Sit near participants likely to be confrontational rather than across from them.

# During the Meeting

## Start-up

Identify the most compelling topic -- begin with that. Post the agenda with times; allow time for ending and check-ins. Distribute roles.

## Check-ins

One-minute check-ins throughout the meeting allow you “park” issues not on the agenda, see where you are, acknowledge progress, and adjust the time frame and/or agenda.

# Near the End

Allow about 10 minutes of an hour meeting for close-down. See the Close-down and Evaluation handout for details. Review decisions, assignments, what to do with “parked” items.

*Meeting Roles and Points-of-View*

# Roles

The “process jobs” of your meeting can rotate once all participants know the expectations.

## Facilitator/convenor

These two roles can be separate or combined. The convenor calls the meeting and does the advance preparation. At the meeting, the facilitator ensures that people participate and that the agenda moves along. They listen carefully to the discussion and identify points of convergence and/or divergence. Often facilitators do not participate in the discussion. Should you the facilitator need to participate, be sure to say that you’re stepping out of role.

## Timekeeper

The Timekeeper gives a 2-minute warning (or other appropriate warning). If the time expires, the timekeeper calls for a decision – to continue with the item for a specified amount of time and adjust the agenda accordingly, adjust the meeting end-time, or “park” the item to be dealt with at a subsequent meeting or in committee.

## Recorder

The Recorder takes notes during the meeting. Best is to post them on a flip chart for all to see. At the close-down they check all the decisions and next steps, circulate notes to participants and absentees, and invite clarification.

## Gatekeeper

The Gatekeeper’s primary responsibility is to welcome late arrivals and get them up to speed (quietly, or outside the meeting room) so the late arrival can slip in without disrupting the flow.

# Points-of-view

Every meeting, large or small, can benefit from different points of view such as:

## Devil’s Advocate, Cheerleader

It’s helpful to consider the “worst case scenario” to ground the proposal in reality. It’s also helpful to have enthusiastic support to spur us on to greater achievement.

## Big Picture, Details

Every agenda item needs to fit into the big picture; the more it fits in, the stronger it is. The details of the item need to be carefully worked out as well; then there will be fewer surprises.

## Moving Ahead, Staying Put

We need to feel like we’re making progress. On the other hand, sometimes no action is the best action. Striking a balance here is delicate, and necessary.

*Practical How-To Strategies for Facilitators and Others*

As in all human relations, communication is the key. These strategies are designed to make your actions as facilitator clear and up front. Even though people say, “It goes without saying that we need to stick to the agenda,” it goes even better if it’s said!

# Staying on task

The agenda is your best friend in helping a discussion stay on task.

Be flexible up to a point. Let the discussion roam a bit – helpful ideas may come to light as the meeting strays from the task at hand. Use your good judgment, however, to draw the discussion back to the topic.

Use the “parking” technique to capture side issues that may turn out to be relevant later.

As facilitator, bring the main points of the discussion into focus. Call for a decision or action. Acknowledge the need for intermediate goals if the topic is too large to deal with now.

# Shifting focus

Should an issue arise that may not have been the focus of the agreed-upon agenda, call it out. Use a check-in to make see if participants want to shift; get buy-in from them.

Designate how much time to spend on the new focal area; let the Timekeeper help you keep to the limit. Adjust the agenda accordingly.

Shifts of focus need to be carefully handled.

# Dealing with the unexpected

Despite all our preparation and great facilitation, we can expect the unexpected. A meeting ‘infrastructure’ helps. New agenda items can be added at the beginning, or even mid-way through the meeting. Good ideas or troublesome concerns can be “parked” to deal with at close-down. Periodic check-ins monitor progress or the lack thereof.

Personal issues, like a participant being called away or a health crisis, need to be dealt with on-the-spot. Use your good judgment to decide whether to continue and keep the person called away informed, or break off the meeting.

For interpersonal situations, look to the next section.

*Dealing with “difficult people”*

People do things for their reasons, not yours -- and they feel justified in doing so no matter how irrational their behavior might seem or how good our intentions are. Put yourself in their shoes; realize that you are not being personally attacked; separate the person from the behavior.

# Types of difficult behavior

## Dominator – acknowledge their contribution; invite them to step aside

(*Those are great ideas, and you know, our decisions will be strengthened by everyone’s input. Let’s make sure everyone has a chance to contribute*.)

## Silent One – acknowledge their presence; invite them to join

(*Although I don’t want to put you on the spot, it would be helpful to have your thoughts on this, either now or in a few minutes*.)

## Fault Finder – acknowledge their ideas; invite creative suggestions

(*We appreciate your input; pointing out difficulties strengthens the final solution. So, what do you think we might do to remedy the situation?*)

## Stonewaller – acknowledge their position; invite participation

(*It sounds like you’d rather not have us take action. What are your reasons for that? What do you think would move us towards a decision?*)

## Tangent Taker – acknowledge the tangent; table it

(*I’m not sure how your point relates to our discussion right now. Let’s make that a separate topic and come back to it later*.)

Difficult people are rarely malicious, but should they be, name the reality of the situation and offer a face-saving way out.

For example, if they’re lying, use neutral questions to get to the truth (*so what happened then? Was there anyone else who saw what happened?*); then offer a way to reverse themselves (*we all know that facts seem different from different points of view*).

If they’re sabotaging, confront them in general terms (*I sense your agenda is different from mine*); then state the impact of their proposal (*your idea might undermine what we’ve already decided; let's consider that*).

*Close-down and Evaluation*

How you end a meeting determines in large part how people feel about it afterwards. It’s your job to name and highlight any and all positive progress, no matter how small it may seem.

# The feedback sandwich, Part 1

Have everyone in the meeting take one minute (by the clock) to note any good ideas that came up, the forward progress, or the satisfying interactions. Each person then states one good idea or satisfying product/process.

# The feedback sandwich, Part 2

Then open the floor to areas for improvement. Be sure to limit the time here. If “negative” feedback continues for more than a few minutes, have them write down the areas for review later. Alternatively, you may want to merely list all the areas-for-improvement without getting into detail, and decide which area is most important to improve upon.

# Next steps

## Open and/or ongoing items

Be sure that the next step on each open/ongoing agenda item is clear – what needs to happen, who does it, when does it happen, and how to report back. Next steps can be done by a sub-committee, by individuals, the manager, a vendor, or at the next meeting. Make it clear.

## “Parked” items

Revisit each item to decide when and if to take it up, who to funnel the information to, how to get back to the 'owner' of the parked item.

## Next meeting

Review the date/time/place of the next meeting. Suggest a tentative agenda. Tell participants how/when you will contact them in preparation for the next session.

# The feedback sandwich, Part 3

Finish the close-down with two or three items of specific, positive feedback – no grousing, negativity, or "buts" allowed. If the meeting is small, have everyone contribute.

You’ve just made a feedback sandwich – the good bread of positive reinforcement surrounding the meat of improvement areas. Participants leave with a sense of satisfaction and accomplishment. You can congratulate yourself on a meeting well run.

Satisfaction practice – good ideas

Note, in 25 words or less, the good ideas that occurred to you in each segment. These ideas stand out from the rest and show you the path to follow.