MINDFIRE PRESS REPORT

Leading Breakthrough Meetings

by

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Leadership Series

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There are many ways to design and run an effective meeting. However, most people don't know what they are or how to apply them properly. In this report, I will share some of the ideas from my book, ***Breakthrough Business Meetings: Shared Leadership in Action***, which I know from personal experience as a manager, organizational consultant, and meeting facilitator work.

The basis of these ideas is a simple proposition—that most people do better work in groups when they engage in a cooperative process. Much scientific research bears this out (Johnson & Johnson, 1989).

A central question of meeting design and management is whether competition (which induces emotional conflict intentionally) or cooperation (which seeks to manage conflict in a supportive way) improves the process and outcomes of group activity. Johnson and Johnson (1989) found strong scientific evidence in their quantitative analysis of over 500 research studies that "achievement and productivity were higher in cooperative situations than in competitive or individualistic ones" (p. 171). Hence, active participation of all participants is the key to my meetings and is the basis of the ideas presented in this report and in *Breakthrough Business Meetings*.

Another important aspect of designing and leading effective meetings is the recognition that meetings are generally part of an ongoing process of getting work done in an organization. They are not isolated events, but part of a larger system of activities. In short, meetings have a before, during, and after that you must consider when designing and leading them.

Given these provisos, here are a dozen proven ideas for designing and facilitating truly great meetings.

1. Involve Participants in the Meeting Design Process

There are several good reasons for involving meeting participants in the design process. First, it gives them a stake in the meeting. Second, you can solicit, and reflect in the design as appropriate, their good ideas for making the meeting more

productive. Third, it signals your intention to involve them actively in a participative process of identifying and resolving key shared issues.

You can do this in several ways, ranging from asking the participants for suggestions for meeting topics to engaging a subset of them actively in the meeting design process. The choice is yours, and it depends on the purpose of the meeting. For example, the former would work fine for most ongoing team meetings; whereas the latter might be essential for a series of meetings intended to develop and implement a process for redesigning an organization.

2. Design a Participative Meeting

A meeting designed to engage, energize, and motivate participants is like a good sandwich. The slices of bread on the top and bottom are process, while the stuff in the middle is content.

Specifically, in the first (typically brief) opening part of a participative meeting you set the tone and provide direction for the meeting in the manner described in numbers 3 through 6 below. This opening process segment involves:

- Agreeing on the meeting's purpose
- Deciding on desired meeting outcomes
- Fitting the agenda to the purpose and outcomes
- Setting ground rules for participant interaction

In the main part of the meeting, you focus simultaneously on managing tasks (i.e., managing the discussion and resolution of the meeting topics) and managing teamwork (i.e., managing interpersonal interactions and any conflicts that may result). Number 7 below describes a four–step method for managing the tasks, number 8 discusses the importance of arriving at a group consensus on key actions, and number 9 presents suggestions for managing teamwork. This middle or content segment is the longest part of most meetings.

In the concluding process segment of the meeting, participants agree on the time, place, and purpose of the next meeting (number 10), and take the time to evaluate the meeting's effectiveness in terms of task work and teamwork (number 11).

3. Agree on the Purpose of the Meeting

At the start of every meeting, the leader should state its purpose (e.g., to review quarterly performance against budget and make necessary adjustments, if any). However, in a participative meeting, the leader takes this one essential step further

by asking the participants what they would like to see the group focus on during the meeting.

This simple act of inviting attendees to participate in the direction setting for the meeting can have a truly profound effect on the ultimate outcome of the meeting if you as leader follow it up with some of other methods for engaging meeting attendees in a participative process described below.

4. Decide on the Desired Outcomes for the Meeting

Having established a joint purpose for the meeting, the next step is to agree on desired meeting outcomes. For the hypothetical budget review meeting, depending on the time available, this might consist of one of several possible outcomes, such as (a) identifying any major problems (if time is limited), (b) then discussing them in depth (if time permits), or (c) developing action plans to resolve them (if time permits and the problems are urgent enough to demand immediate action). The choice of desired outcomes, which the entire group makes together, provides the additional, more specific direction needed to focus participant's effort during the meeting.

As a practical matter, groups often discuss and agree on the meeting's purpose and desired outcomes (numbers 3 and 4) simultaneously.

5. Fit the Agenda to the Purpose and Outcomes

You came into the meeting with a tentative agenda, but because you modified your purpose and specified desired outcomes as a group, you may need to adjust the sequence and timing of the original agenda topics, or add or delete topics, to match your agenda to the new purpose and desired outcomes. Otherwise, you will have missed the point of engaging as participants in a collaborative meeting process, which is to make the meeting an experience in shared leadership with a common, overarching goal or vision.

6. Set Ground Rules for Participant Interaction

This final element in the first process segment of a participative meeting is the best kept meeting secret of all. Less than 1% of the meetings I have attended (but not facilitated) included this vital activity.

As described in detail in *Breakthrough Business Meetings*, setting ground rules involves listing on a flip chart, board, or in some other visible place the ways in

which participants will interact with each other during the meeting. Typical ground rules are:

- Start and end on time.
- Take frequent, short breaks.
- Be open and honest.
- Focus on issues. Avoid personal attacks.
- Work as a team.

Of course, the actual ground rules will vary from meeting to meeting depending on the way the participants want to interact. Some groups (e.g., a board of directors) expect a very formal meeting atmosphere, and set correspondingly rigid ground rules. Other groups (e.g., an engineering design team) prefer a more rough and tumble environment.

There is no such thing as a set of perfect meeting ground rules, although some (such as those listed above) are pretty universal. Rather, each group of meeting participants must decide for itself what will work for them, and must accept responsibility for enforcing, and if necessary modifying, those ground rules during the meeting to ensure that they stay focused as a group on the tasks needed to achieve their desired outcomes.

7. Answer Four Key Questions for Each Agenda Item

To manage meeting time most effectively, the group must answer four questions for each item on its agenda:

- What is the specific issue?
- What result do we want from our discussion?
- What process will we follow when discussing it?
- How much time will we allow for our discussion?

For example, if the purpose of a meeting was to discuss training needs for an organization, one agenda item might be project management training. The answers to the four key questions for this agenda item might be something like this:

- The specific issue is the type of training required for all project leaders.
- The desired outcome of the discussion is a preliminary specification of the learning objectives for the training program.
- The process will consist of (a) brainstorming ideas, (b) discussing and refining the list, and (c) identifying a subgroup to develop the idea further and

present their recommendations for a training program to address the needs and meet the learning objectives at a subsequent group meeting.

- Within the time allowed for this agenda item, we will use 5 minutes for brainstorming, 10 minutes for a discussion of the proposed learning objectives, and 5 minutes to decide which participants will serve on the subgroup and what the group's expectations are for their work between meetings.

The agenda management process implicit in this four–step method is one of the secrets to managing tasks in a participative meeting. Another is being able to facilitate a group consensus (number 8). As you will see in number 9, the secret to managing teamwork in a participative meeting is managing conflict effectively.

8. Decide on Key Actions by Consensus

In contrast to traditional meetings, where the person in charge often feels obligated and empowered to steer the meeting and make the important decisions unilaterally, participative meetings are exercises in shared leadership which thrive on group consensus for all major decisions.

To reach consensus, participants must discuss issues until they all either agree with the resolution, or are neutral but can support the group's decision. Negative minority opinions are not acceptable.

This is similar to the process that a jury must use in a criminal trial. Either they all agree on the guilt or innocence of the accused, or they become a hung jury. In those rare instances when the jury cannot reach a unanimous verdict, the judge declares a mistrial. In the case of a meeting, in those rare instances when the group cannot reach consensus, the group leader makes the decision for the good of all.

It is impossible to overestimate the importance of consensus decision making to the effectiveness of a meeting. Consensus is the life blood of a participative meeting.

9. Manage Conflict Effectively When It Arises

The three most common sources of conflict in any meeting are:

- The stage of the group in its evolution
- Personality differences among participants
- Truly disruptive people

While space does not permit a thorough examination of each source of conflict (and the strategies for dealing with it effectively) when it arises in a meeting, there are a few general strategies that can improve anyone's ability to deal with meeting conflict.

Start by viewing conflict as inevitable and useful, to a point. Conflict is an early warning signal that something is wrong with the meeting process that needs the group's attention. So, if you see signs of conflict, especially when the group is new or when a new member joins the group, do not automatically assume that it is unhealthy and intercede to caution the group to stay on task. That may be the worst thing you can do, as it will prevent the group from dealing with its process issues and inhibit the group's movement to the next stage in its evolution as a team.

For example, everyone knows that even groups that eventually become high–performing teams have rocky starts. Every group does. So, if you are just coming together as a group, cut yourselves some slack and spend time listening to each other's concerns before deciding if the conflict is getting in the way. Later in the group's life, individual's identified as trouble makers based on their actions in the group can be dealt with more directly (by establishing ground rules, imposing sanctions, and other means described in *Breakthrough Business Meetings*) so that their disruptive behavior does not side track the group unnecessarily.

10. Schedule the Next Meeting

Capitalize on the positive energy generated by the participative meeting and take the time to agree on the time, place, and purpose for the next meeting. This will help the group to carry its momentum forward and may save time by uncovering obvious scheduling conflicts early enough to work around them.

Even if you have to modify the parameters of the meeting later, this step will cement the gains from the meeting, and it will send the message that this meeting is part of an ongoing process of continuous improvement that depends for its success on the active, ongoing involvement of the meeting's participants. This is a very important message to send if you want the group to sustain its momentum between meetings.

11. Evaluate the Meeting's Process and Outcomes

How can you have continuous improvement without measurement? It's not possible. Yet, how many meetings of ongoing groups, such as staff and committee meetings, have you attended which concluded with an honest, quantitative and qualitative

assessment of the meeting's effectiveness with the goal of making the next meeting better?

One of the ways I use to determine if a meeting worked involves a simple rating of the overall meeting (i.e., its process and content) to gauge its quality and serve as a benchmark for future meetings. I do this by asking each participant to quickly rate the meeting on a scale from 0 (low) to 10 (high). I capture these ratings on a flip chart, board, or device visible to the entire group. Then I quickly determine the approximate average score for the meeting and engage the group in a short discussion of what worked well and what needs improving to make the next meeting even better. The discussion that results from such an evaluation process is often quite amazing; providing profound insights into the nature of the group, its underlying concerns, and its potential for improvement.

12. Follow Up on Key Actions between Meetings

Subgroups who have volunteered to continue the work of the group between meetings need leadership, support, and development. This is the task of the group leader. Your role is to serve as a supportive coach and provide encouragement, guidance, access to information, the opportunity to attend needed training or development sessions, and whatever else the subgroups need to achieve their meeting–related work goals.

While this step may seem obvious, most group leaders fail to execute it properly. It calls for a delicate balance between being unobtrusive yet available to people. Think of the player's coach in a team sport whom you admire most, and try to emulate his or her behavior. Alternatively, think of someone you know who is truly effective at teaching without lecturing; or think of the best transforming leader you've ever known.

The key is to follow up actively on key action items that subgroups are working on between designated meetings for the benefit of all the meeting participants, and to do so in the most helpful way you can. If you do this, the chances of your group being truly effective and gelling into a high–performance team increase dramatically. If not, you run the risk of dissipating the energy and focus attained during your participative meeting.

Conclusion

I hope that these 12 ideas for designing and leading better meetings, which I learned from experts in group management, help you as much as they have helped me. If you want to improve your meetings even more, I hope you will buy a copy

(Amazon.com and Barnes & Noble carry it in their online bookstores) of ***Breakthrough Business Meetings: Shared Leadership in Action*** and learn more of the secrets of successful meeting management. If you decide to do that, be sure to email me, <u>DrL@MindFirePress.com</u>, and share your experiences.

References

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