Conducting Powerful Meetings

eREPORT

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SCENE 1

Are you going to the staff meeting?

Do I have a choice?

Not much. Two long, boring hours.

Every Friday afternoon. Just like clockwork.

One of these days we'll figure out why.

It's his way of making sure we don't leave early.

SCENE 2

Time for the new product development meeting.

Ok. I'm anxious to see what information was collected this past week.

The agenda says Smith from New Materials is giving a report. Maybe there's a new development.

I've got some data to share that might give us a lead.

Good, let's go.

Which meeting scene is most familiar to you? Do you approach a corporate meeting expecting just another annoying waste of time? Do you walk away from it wondering why you wasted your time? If so, you know first-hand how frustrating inefficient meetings are. Most managers spend 25-30 percent of their time in meetings and studies show that the average cost of a meeting runs over $1,000. Since it's rare to have a meeting-free day, for most organizations, the total cost of meetings quickly adds up to a major expense.

Meetings are currently the most expensive communication activity in the corporate world – more costly than word processing, computers, paperwork, or multitudes of phone calls. Consider the salaries of those in attendance, preparation costs, travel expenses, and the price of materials, facilities, and equipment used during the meeting. Even if an organization conducted only two meetings a week, the total annual cost for those gatherings would run well over $104,000.

Perhaps even more costly than the loss of time and money is the reduced morale that happens when people are forced to sit through boring, poorly planned and conducted meetings. When unproductive meetings occur regularly, people with demanding schedules begin to avoid attending. Yet, these are the very individuals whose participation may be most important.

The primary reason meetings don't accomplish their objectives is lack of advance planning and preparation. Even though executives spend a significant portion of their time in meetings, studies show that 78 percent have never received training on how to plan, organize, and conduct a meeting.

When meetings are well-managed, they are effective and essential tools for communication within the organization. Important decisions are made, ideas are generated, and information is shared. Meetings are a critical part of team building, and as team spirit grows, the group's ability to work together and make decisions grows, which greatly benefits the company.

Functions of Meetings

There are six basic functions that meetings perform better than any other communciation technique:

- **Share knowledge**: Meetings provide a forum where individual information and experience can be pooled. The group revises, updates, and adds to it's collective knowledge.

- **Establish common goals:** Meetings help every member of the team understand the goals and objectives of the group and how his individual efforts will affect those objectives.

- **Gain commitment:** Meetings help team members gain consensus on decisions and foster commitment. An agreement and sense of responsibility to implement and support the decisions is created.

- **Provide group identity:** Meetings define the team. Those present belong to the team; those absent do not. Attendees develop a sense of collective identity.

- **Team interaction:** Meetings are often the only occasion where the group works as a team.

- **Status arena:** Meetings give group members a chance to determine their relative status.

You may not achieve any of these functions at any one specific meeting but if none of these functions are important to you, you may want to choose a different, less expensive, communication method.

This eReport will show you how to plan, conduct, and follow up on meetings. Meetings do not have to be a waste of time. When well-planned and implemented, they offer enormous benefits.

To explore this topic further, see Speaking with Authority - 17-page PDF e-Report.

Guidelines for Effective Meetings

The fundamentals of successful meetings are not complicated or difficult to follow. Even so, meetings that are tedious and unproductive are evidence that these guidelines are often overlooked.

Here are the basics for a productive meeting:

1. Need. Hold only those meetings for which there is a demonstrated need. Weekly status updates require a meeting only when five or more people need the information. You can speak to three or four people individually and save a lot of time. Regularly scheduled staff meetings may not be necessary if you have a small staff and have opportunity for frequent interaction. Meetings are ideal when you need to solve problems that are complex and/or affect many people, exchange technical information, or explain a complex policy, procedure or situation.

2. Purpose. Every meeting must have specific, stated objectives and a broad purpose. Attendees need to know the meeting topics beforehand, in writing, so that they can come prepared.

3. Attendees. Invite only attendees who can contribute or who have a serious need to know. The more people who attend a meeting, the longer it will take to accomplish your objectives. The ideal size for a working meeting is five to seven people.

4. Agenda. Agendas are an absolute must for every meeting. Yet, while having an agenda is the most critical element of effective meeting management, 75 percent of all meetings have no pre-planned agenda. If possible, distribute the agenda 48 to 72 hours prior to the session. Use an agenda even for last-minute meetings. The meeting leader can write an agenda on a flipchart or whiteboard or the agenda can be developed with the attendees as the first action of the group.

Agendas not only help the attendees come prepared, they force the meeting leader to organize his thoughts and priorities. A good agenda addresses issues in order of importance and allocates time to each issue.

5. Choose a good meeting place. The room should offer proper ventilation, comfort, accessibility, and the necessary equipment. It should also be free from distractions and interruptions.

6. Start and end on time. Meetings should begin and end punctually. This sends a message to participants that their time is respected and that they are expected to respect the meeting time. You might consider beginning the meeting with an uncomplicated activity, so that those who still arrive late can catch up. Avoid "recapping" for late-comers.

7. Stick to the agenda. Although you want to encourage participation, new issues should be noted and held over for a later meeting. If you let the meeting get sidetracked, you will have difficulty meeting the goals and objectives established. If critical issues arise that prevent resolution on an agenda item, they can be noted and that item can be rescheduled for a later meeting. If a new item is so critical that it needs immediate attention, poll the attendees for an agreement to address it at the current meeting. The agenda is a contract with the attendees; it should not be changed without their concurrence.

8. Encourage participation. Attendees should feel comfortable enough to offer opinions or suggestions openly.

9. Maintain a balanced, controlled discussion. Support members in expressing their opinions, even on volatile, highly charged issues, but discourage arguments. Do not let any one person dominate the meeting.

10. Summarize and distribute minutes. Recap the decisions and any actions planned as a result of the meeting to make sure that everyone is in accord on the proposed action details: who is to do what and when. Make sure that each attendee receives written minutes no later than two days following the meeting.

You can help ensure consistently productive meetings by following a meeting policy based on the above. A succinct one-page set of guidelines should be printed, distributed, and most importantly, followed. The easiest way to encourage the adoption of these guidelines is to demonstrate them. As people see the effectiveness of meetings increase as a result of following the guidelines, they will begin to implement them also.

To learn how to better prioritize meeting time—and other important time in the day—see Using Space and Time - 15-page PDF e-Report.

Managers at the Western Center of General Dynamics follow a meeting policy, knowing that this saves the company money, helps personnel learn to lead and participate in effective meetings, and improves morale and team spirit because objectives are met through good meeting dynamics.

These are the meeting guidelines used at the Western Center:

- All meetings start and end on time, with a maximum length of 90 minutes.
- Each participant has a commitment to making the meeting successful.
- Establish a clear objective for the meeting and follow the agenda.
- Emphasize common courtesy and caring. Criticize issues, not people.
- Establish a positive orientation of, "We are here to help."

Preparing for an Effective Meeting

The success of a meeting is directly related to the amount of time invested in preparation beforehand. Before planning the meeting, you should understand what type of meeting it will be. The type of meeting affects how many people attend, the structure of the meeting, and the meeting objectives. Here are the basic types of meetings:

- **Information exchange:** Information exchange meetings provide a forum for disseminating the same message to a large group of people. This is important when the information is controversial or complex, it has strong implications for attendees, or if it needs to be conveyed in person. A meeting to explain a new profit sharing policy would be an example of this type of meeting. It is also used for status meetings, which generally feature progress reports on all projects under the scope of the attendees. These reports keep the group posted on the current status of projects it is responsible for. Information exchange meetings can be relatively large in attendance. The format typically includes formal presentations with questions and answers from other attendees. Audiovisual equipment may be required.

- **Brainstorming:** These sessions generally precede problem-solving meetings when it is important to generate alternative solutions. Participation of all attendees is critical and it is important to have a broad mix of attendees, although they generally should not have more than seven attendees.

- **Problem-solving:** The objective here is to pool the knowledge, wisdom, and experience of the attendees and to identify the best possible solution to the problem. In order to meet that objective each attendee needs to understand the problem and each participant should have a part to play in solving the problem. Brainstorming should be used to identify possibilities. Every participant should be encouraged to contribute. After a solution is agreed upon, it should be analyzed for weaknesses. Consider both the positive and negative aspects before taking action. These sessions should have no more than five to seven participants and should be very informal and participative.

- **Project planning:** Planning and implementation meetings are primarily held to determine logistics and responsibility allocations. They can be somewhat larger than a problem-solving session. It is important to document decisions, action items, and responsibilities.

- **Training:** Training sessions are ideal when they are limited to 15-20 attendees, require participation, and give people a chance to learn from their peers.

Determine the Purpose

The meeting leader needs to recognize and fine-tune the specific purpose for the meeting. For instance, if the general topic is training needs, the manager might break it into more specific subtopics, such as: identifying primary training needs for each department; determining which needs could be done in-house; establishing priorities; and developing a strategy for training. The process of fine-tuning the purpose might determine a need for more than one meeting.

For more in this topic, see Goal Setting - 38-page PDF eWorkbook.

Too often the purpose of a specific meeting is vague, or even worse, bogus. Here are a few examples:

- **Weekly staff meeting:** Ostensibly to bring everyone up to speed, too often it's a ritual done because the manager thinks she should. Because the meeting doesn't have a compelling purpose, it's usually accompanied by groans, no-shows, and stragglers.

- **Rah-rah:** Many managers think meetings are cheerleading sessions, a time to motivate the troops. It doesn't take long for the "troops" to see through this.

- **Political hay:** Some managers try to use meetings as a time to show how smart they are or how important their department is.

The first question a meeting leader should be able to answer is, "Why are we having this meeting?" Until the meeting leader is completely clear about the purpose of the meeting, there is no way the meeting will be efficient and effective.

Set Meeting Objectives

The meeting leader should have a written set of objectives for the meeting. These should be objectives that can be accomplished only by bringing together a group of people. If one person can accomplish the objectives, there's no point in having a meeting. Here are some common objectives:

- **More accurate information.** Since messages become standardized in a meeting, management can ensure that everyone receives the same information in the same way. As companies grow, communication tends to get more complicated, so this function of meetings becomes even more important. However, for simple messages, which do not require interaction, memos are a much more cost-effective method of distributing a standardized message.

- **More effective coordination of activities.** Meetings bring people together and help them understand how they fit within the company. Presenting the "big picture" helps each individual understand the importance of and how to implement change.

- **Improving the flow of communication both upward and downward.** Meetings connect top management with employees, allowing management to report on what the company has accomplished and to explain future changes. Employees have a chance to ask questions, seek clarification and understand the decision processes involved with changes. They may also offer suggestions and ideas for consideration by management.

- **Facilitating the decision-making process.** Attendees bring with them the pieces of information necessary to solve a problem. Once a solution is identified, those who will implement it should be present to add their ideas and suggestions.

- **Training.** Training meetings ensure more uniform training of employees and provide an interactive forum where participants can learn from each other.

- **Building morale.** The sense of teamwork is revitalized at meetings in an environment of purpose and commitment. Meetings provide an excellent forum for recognizing achievements of the group and individuals.

When deciding whom to invite to a meeting, choose only those persons who have a reason to participate. Under no circumstances should someone be included simply because it's political or his "feelings might be hurt if not asked." Those attending should:

- Have thorough knowledge of the meetings subject matter and be ready and able to make a valuable contribution;
- Have the power to make a decision;
- Be responsible for implementing decisions or bringing a project to the next stage;
- Represent a group that will be affected by decisions made at the meeting.

The size of the group should also be a factor when selecting participants. Although informational meetings do not require limits on attendees, consider the following size guidelines for other types of meetings:

- A meeting to identify a problem should be limited to ten people.
- Problem-solving meetings are best accomplished with no more than five to seven people.
- Training sessions should involve 15 - 20 people, less if hands-on instruction is part of the curricula.

Between four and seven people is generally ideal for any meeting, ten is tolerable, and 12 is stretching the limit. Meetings tend to be more productive when the number of participants is low. In large group meetings, there is less opportunity for individuals to participate and consensus decision-making becomes extremely time consuming and frustrating.

If certain people on your team never seem to agree on an issue, you may want to read Personality Chemistry: Preventing Conflict at Work – eReport.

Here are two ways a leader can pare an attendee list down to size:

- Analyze the agenda to see if everyone needs to be present for each item. It might be possible to divide the agenda into two parts, so that some people need only stay for the first section and others can arrive for the second.

- Consider whether two separate smaller meetings might be more appropriate. If a large group must be included to reach a decision making goal, try to hold meetings of smaller subgroups, beforehand. After the subgroup has reached an agreement regarding the issue, a representative can attend the final decision making meeting. Later, the representative can relay the final decision back to the first group.

In general, meetings with large numbers of attendees should be kept as short as possible to meet the objectives. Large meeting groups may need to implement formal procedures such as *Robert's Rules of Order*, by Henry Robert, to ensure that each attendee has the chance to participate.

Plan the Agenda

As mentioned previously, the agenda is the single most important component of meeting planning. A well thought-out agenda distributed prior to the meeting will provide participants with purpose and direction. It prepares participants in advance and helps to create a solid structure for the meeting.

The meeting leader can ask participants to submit agenda items if she wants to promote group involvement and avoid surprises at the meeting. A written agenda is useful, because it:

- Enables participants to come supplied with the right materials.
- Provides a framework that supports the flow of the meeting and keeps a time frame for the discussion of each topic.
- Keeps the group on track with a written reminder and focuses the group's attention.
- Lets all participants know who has been invited.

Make sure the agenda is succinct and direct, but avoid making it too brief or vague. In general, keep the agenda and meeting short. It is better to schedule two or three shorter meetings and keep the number of items per meeting to five or six, rather than try to cover everything in one monster meeting.

Need help with agenda writing or business writing? Check out Writing Skills - 24-page PDF eReport.

The agenda should cover the following points:

- The date, start time, and finish time (generally not more than two hours).
- Where the meeting will be held, and, if necessary, how to get there.
- The topic and sub-areas to be covered, including a brief description of each .
- A brief indication of the reason for the inclusion of each topic.
- How much time will be allotted to each topic.
- A list of participants.

Each item on the agenda should be relevant to the purpose of the meeting. Ask yourself the following questions when considering whether or not to include an item:

- Does the item support one of the meeting objectives?
- Is the item of concern to all group members?
- Does the group have the authority to handle the issue?
- Is the subject appropriate to the level of the group?
- Does the group have all the data it needs to discuss the topic?

Unless you can answer "yes" to the first four of these questions, drop the topic. If you answered "no" to the fifth question, refer it to a subcommittee or staff member for research. The topic can be added to the agenda once the necessary information has been gathered.

Additionally, the agenda should explain the meeting objectives and what questions and issues are likely to arise. If one item is of special interest to the group, it is often best to single it out for special mention in a covering note. Meeting leaders should consider identifying each item with: "For information," "For discussion," or "For decision" so that attendees are aware of the purpose of each.

Managing the Energy Cycle

Meeting leaders who expect to have effective meetings must be aware of energy cycles. Meeting energy is affected by:

- Attention cycles,
- Interest in topics,
- Complexity of topics,
- The number of topics to be addressed,
- The scheduling of those topics and the level of participation of attendees.

Every meeting has an energy cycle that can be managed and enhanced by a perceptive leader. The key is getting the timing right.

The early part of the meeting tends to be more lively and creative than the end of it, so items requiring more imaginative ideas, mental energy, and clear heads should be addressed early in the meeting.

- Any items of absolute priority should be first on the agenda, avoiding the possibility of getting stuck on low payoff topics.

- In the absence of critical, high-priority items, one scheduling option is to first address those items that can be brought to closure quickly and easily, leaving the rest of the meeting for lengthier items.

- Consider reserving a controversial, high interest item until the end of the session. This way, useful work can be accomplished before the topic comes up. The high interest level in that item will keep attention from lagging.

- Items can be grouped in a way that allows people to cycle in and out of the meeting, as they are needed. Changing the make-up of attendees automatically raises the energy level as fresh faces and new voices appear.

- If the meeting will be long with many agenda items, consider alternating working items with reporting items in order to avoid boredom.

- Try to find a unifying item to end the meeting. If any of the items on the agenda have been divisive, it's particularly important to bring the group back into harmony.

For more on finding harmony with coworkers, check out Alessandra on Platinum Rule - MP3.

Set the Time and Place

It is important to choose a time and place that enhances the meeting and its objectives. Poorly timed meetings can create resentment even before they begin and meetings held in hot, stuffy rooms sap energy from the participants. The three most common times for meetings are as follows:

- **Noon—**This popular meeting time is disliked by some people because it interferes with their lunch. This can be partially compensated for by providing lunch.

- **Mid-morning—**This is probably the most popular time for meetings as it gives participants time to gather their thoughts, take care of leftover work, and get departments started on the current day's assignments.

- **Late afternoon—**Some people like to hold late afternoon meetings because they feel that the nearness of quitting time will pressure people to come to closure.

Most meeting leaders find that the mid-morning meetings are best for working meetings where it is important for participants to be at their best. Lunch and afternoons meetings are more appropriate for status and information exchange. Experience shows that Mondays and Fridays are the worst days to hold a meeting. The proximity to the weekend catches people at a time when they may not be fully engaged in work priorities.

The length of the meeting is also important. Most meetings should not last more than two hours. If they do, schedule a coffee break every 90 minutes so that people can stretch, call their offices, get refreshments, etc. This is the best way to ensure that longer meetings retain their effectiveness.

The primary consideration when choosing a room for a meeting will, of course, be the size of the group. The room should be quiet, well ventilated, and the appropriate temperature. As much as possible, it should be distraction free and comfortable. Also consider the ease of accessibility for the greatest number of people. The meeting location should offer conveniently located rest rooms, a water fountain, and telephones.

To help your staff tune out distractions and tune into meetings, get the Dynamics of Effective Listening - MP3s.

Room Arrangement

There are basically seven different styles for arranging participant seating. Each arrangement affects the pattern of communication.

- **Theater style—**Rows of chairs are arranged in a semi-circle facing the stage or podium. It is appropriate for large informational meetings. The leader takes the role of the lecturer, and the semi-circle design allows for some group interaction and question-and-answer sessions.

- **Classroom—**This arrangement has rows of tables and chairs facing the front of the room. It is used with a lecture format and it allows limited opportunities for group interaction. This style works well for informational, limited interaction meetings with medium to large groups. The tables facilitate the handling of materials and taking notes.

- **U-shaped style—**The leader or leaders sit at a separate table at the front of the U-shaped participants' seating area. This style is appropriate when participants need to spread out materials such as worksheets. The setting focuses all the attention on the leaders, since the large space in the middle isolates members from one another.

These three arrangements are used primarily with large group meetings while the following four are used for smaller group meetings.

- **T-formation—**The head table is attached to the end of the main participants' table. This gives participants closer face-to-face contact. The attention is focused on the leaders who are clearly set off from the rest of the group. This formation only works for a small number of participants and is often used when there is a panel of leaders or experts who sit at the head table.

- **Power chair—**This arrangement has the chairperson presiding at the end of the table. This popular arrangement focuses the attention on the leader and gives her the ability to retain tight control over the agenda and meeting.

When the leader wants participation, she can utilize one of the two equalizing patterns -- democratic or round table. Here, the leader sits among the participants. This is most effective when the leader knows what she thinks about a problem and wants to foster an environment in which others can be creative while she maintains a low profile, not wanting to lead others with her opinions. The manager should choose the seating style which best serves the purpose and type of meeting she is planning.

- **Democratic—**In this arrangement the chairperson sits on one side of the table and the ends are left open. While the leader can still maintain control, there is an appearance of openness. It is easier for participants to communicate with each other rather than directing all comments toward the leader.

- **Round table—**The most participative pattern. In this arrangement everyone is equal and encouraged to participate as a full partner, minimizing status and power.

Facilities Checklist

The best planned meeting can be destroyed by logistics gone askew – the over-heated room, the burnt out light bulb in the overhead projector, insufficient chairs, and so on. There are hundreds of details that go into an effective meeting and the failure of any one of them can derail the session. Here is a checklist to help you remember these details:

- **Room set up—**Reservations for room made? Enough chairs? Podium needed? Thermostat located and working?

- **Audiovisual equipment and materials—**Projectors? Flip charts? Microphones? Display materials? Tape recorders? Pens? Extra bulbs? Light switches located?

- **Handout materials—**Adequate number of copies for distribution? Staff support for handing them out?

- **Refreshments—**Coffee, tea, and soda? Cookies and fruit? Sandwiches?

- **Miscellaneous—**Pads? Pencils? Ashtrays? Marking pens? Name cards?

While it's true that many meetings waste a great deal of everyone's time and seem to be held for historical rather than practical reasons, it doesn't have to be true. There is great benefit to be gained from bringing people together in an environment that encourages them to share their ideas, feelings, opinions and suggestions. This eReport has concentrated on how to plan an effective meeting. The next section will discuss how to conduct an effective meeting.

Dynamic Meeting Leadership

The first step of dynamic meeting leadership is to know what you want to accomplish during the meeting. Once you know what you want to accomplish, you need to bring those objectives into alignment with the objectives of the attendees. The most productive way to begin the meeting is with a review of the agenda and the meeting goals. The leader makes copies of the agenda available in case anyone forgot to bring his. This initial discussion gives everyone an opportunity to ask questions, offer suggestions, and express opinions about why they are there.

The most important role of the meeting leader is to function as the group facilitator. A good facilitator understands how groups interact, knows how to stimulate participation, and maintains control of the meeting process. The most observable aspect of the group process is communication. Observations of communication patterns will reveal important clues about what's going on.

For more on this topic, see Alessandra on Nonverbal Communication - MP3.

Meeting facilitators should ask these questions while observing the group:

- Who's doing the talking? For how long? How often?
- Who's not talking?
- Who are people looking at when they talk?
- Who talks after whom, or who interrupts them?
- What style of communication is used (assertions, questions, tentative statements)
- What tone of voice is used?
- What is being said nonverbally through body language, posture, gestures, or seating arrangements.
- Who are the followers?
- Are people listening carefully to others?
- Are minority opinions being solicited and respected?

These observations can give the facilitator clues about what actions to take:

- When to step in and encourage a response from a non-participator and when to discourage someone who may be monopolizing the discussion;
- When to ask or encourage questions to stimulate a more open discussion;
- When to calm the waters if vocal tones and body language start to become overly hostile;
- When to ask for a summary or further explanation if members seem to be lost or confused;
- When to move on or table a discussion for a future meeting if an issue cannot be resolved.

The group leader should put people at ease with his opening remarks, setting an appropriate climate for the meeting. The meeting should begin on a positive note, communicating both verbally and nonverbally the leader's respect for each member. The leader should make sure that the participants know each other. Take the time for brief individual introductions if people are from different organizations or groups. If there is a visitor or observer, make sure he is introduced and the participants are told his purpose for being there. Group dynamics can be derailed by an unfamiliar presence, especially if there are sensitive or controversial topics being discussed.

For more on leadership, see my Leadership Series

Good meeting facilitators always:

- **Establish a climate for sharing.** Maximize participant comfort by: holding the meeting in a comfortable facility; providing name tags, if necessary; arranging chairs so that each person can see the others; encouraging everyone to speak; protecting the rights of individuals to have dissenting opinions and to change their opinions.

- **Explain the ground rules.** Let attendees know what you expect of them. Check their understanding and acceptance of the rules.

- **Set goals.** Develop meeting goals with the group and refer to them often as the meeting progresses.

- **Explain the agenda.** Announce items to be covered, and the structure and process of the meeting. A written agenda emphasizes the meeting focus and aids the participants in discussing the proper item. Whenever practical, allow group members to participate in agenda setting.

- **Stay task-oriented.** Focus on tasks, not personalities or irrelevant issues.

- **Let everyone be heard.** Acknowledge all ideas. Not all ideas must be used or even judged, but all ideas must be heard.

Meeting leaders should be aware of the five common meeting phases. While all meetings go through these stages, the amount of time spent in each can vary widely. The leader who understands these phases can use the dynamics to make the meeting more productive. Here is a brief description of the five common phases:

- **Social—**The first few minutes are when the group acknowledges each other socially. Typically, this time includes chatting about personal, family and work interests. While this is not a productive part of the meeting it is important time as it sets a friendly, interactive tone.

- **Catharsis—**If an agenda contains controversial, complex, or even interesting topics, chances are that there will be diverse opinions and objectives regarding the outcome. It's very important to let attendees express opinions, reservations and objections early in the meeting to defuse hostility. The dynamic meeting leader might open the meeting by saying, "Let's take ten minutes to get any objections out in the open," or "Does anyone have any concerns about the agenda or our objectives for this meeting?" If this is not done, repressed negative emotions can interfere with the productivity of the meeting.

- **Learning—**In this stage, participants listen and acquire information. It's important to watch for fatigue or boredom in this phase. If the material is dry, technical, or presented in an uninteresting manner, try to have a change of pace break every 10-15 minutes. Simply stopping and asking for questions, requesting an opinion on some aspect of the presentation, or summarizing the key points can do this.

- **Policy making—**Information is summarized and decisions are called for. This consensus-seeking stage is often the most challenging for meeting leaders. Successful implementation of decisions generally requires a genuine commitment by everyone involved. Decisions can be forced on meeting participants but commitment can't be. It's important for leaders to make sure everyone expresses their opinions in this stage and that the group works its way through to a decision they can all agree on.

- **Action—**Implementation procedures are agreed upon and future committee actions are decided. It's important to accurately document all decisions and actions and make sure that responsibility for each action step is determined.

Minutes

If a meeting is important enough to be held, it's important enough to have the decisions and action items recorded. Meeting minutes make sure that important points and decisions are recorded accurately, without misinterpretations. Taking notes should not be the responsibility of the meeting leader. The trend today is to have participant serve as the secretary and record necessary items on a flip chart as the meeting is progressing. When using a flip chart, designate one blank page as "Action Items," and record all such items or assignments on it.

Minutes developed on a flip chart or overhead projector are helpful in that they allow review by participants during the meeting. If it isn't possible to develop the minutes as the meeting is progressing, they should be produced and distributed as soon as possible after the meeting (not later than two days after) so corrections can be provided before memory erases the details of the meeting. Remember to keep minutes short and succinct: one page is ideal. This is a summary, not a word-for-word transcript.

Minutes should contain the following information:

- Time and the date of the meeting, where it was held, and who chaired it

- Names of all present and an indication of members not in attendance

- All agenda items (and other items) discussed and all decisions reached.

- If a task was agreed on and assigned, indicate the person responsible for the task.

- The ending time (important, because it may be significant later to know whether the discussion lasted 15 minutes or 6 hours).

Encourage Participation

Nothing affects the productivity and outcome of a meeting more than the participation of the attendees. The purpose of calling a meeting is to benefit from the combined information, wisdom and experience of the participants. If the attendees are not sharing their ideas and opinions, the purpose of the meeting isn't being met and you run the risk of making inferior decisions. Here are several ideas for encouraging participation:

- The date, time and place of the next meeting.

For more on effective use of time, see Time Management - 37-page PDF e-Report.

- **Ask for participation.** The first step is for the leader to express his commitment to group participation. He should ask for participation and demonstrate rewarding verbal and nonverbal behavior for individual participation. Every person should be treated with courtesy and all ideas and contributions should be acknowledged even if they run counter to the leader's opinions and beliefs. "That's a good question," "Thanks for sharing that," "Interesting point," or "I'm glad you mentioned that," are all comments that will encourage additional contributions of ideas and opinions.

- **Ask specific questions to individuals to encourage them to get involved.** Before opening up the discussion to anyone ask, for example, "Sarah, how do you feel about the budget figures?"

- **Resist dominating.** Resist the temptation to give anyone your informed opinion up front. This will immediately cause reluctance by some who might disagree. Instead, keep a low profile on issues where you want the honest opinion of others. It is easy for a leader to dominate a meeting but if you only wanted your opinion, you wouldn't need a meeting.

- **Demonstrate active listening.** Set an example by listening carefully to each speaker, taking notes, asking for clarification, paraphrasing the remarks and asking for validation that you understood the message.

- **Break the group into subgroups to discuss the agenda item, with a spokesperson for each subgroup reporting back to the overall group.** If there are more than seven participants in a meeting, or if the participants are varied in expertise or rank, there may be a hesitation to participate because of the fear of being wrong or looking foolish. Small groups of three to four are less threatening and give each person more opportunity to participate.

- **Discuss participation.** If nonparticipation is a serious problem, ask the subgroups to discuss ways to get the whole group to participate more. Openly discussing the meeting process helps people understand that you are serious about generating discussion and sharing of ideas.

- **Use the brainstorming format.** Tell the participants it's a brainstorming session where everyone is asked for ideas and no criticism is allowed. Make it fun. Tell them to give you their stupid ideas as well as the ones they think are good. Tell them that, in this very special meeting format, quantity of ideas is more important than quality. Explain that you can always go back and evaluate the ideas later. The brainstorming format often gets people actively involved and interested.

Encourage Problem-Solving

If your meeting has a problem-solving agenda, you need to be able to keep the group focused on the problem-solving process. The first step is to set an example by focusing on the facts and understanding points of disagreement rather than getting bogged down in personalities and politics. Try to keep different points of view in balance as much as possible and avoid having one person or group dominate the discussion. You may have to ask specifically for other points of view if the quieter members are not expressing their opinions. Never assume that silence means agreement; more often it signals some level of disagreement with the dominant theme of the discussion.

Effective problem-solving meetings generally follow a pattern. Early in the discussion, the group will be trying to understand the nature of the problem. In this phase, the meeting leader should encourage factual, non-evaluative discussion of the problem symptoms. All possible solutions should be identified without evaluation. It is important to identify all possible solutions in order to be able to select the solution that best fits the needs of everyone involved. Only then should the discussion become evaluative as the group begins to weigh the possibilities.

The challenge in problem-solving meetings is to keep the group from rushing to adopt a solution. Too often someone

- **Avoid "power" seating arrangements.** Be careful when choosing a room arrangement for the meeting. Certain types of seating styles are more conducive to group interaction. If the leader wants to encourage participation, he should not position himself in a dominant position, such as behind a podium or at the head of the table.

For more on this, see The Edge -- MP3s.

suggests a solution that seems to fix the problem. If no one sees an immediate drawback, the solution is adopted and the group goes on to the next item or to an implementation plan. There are two hazards to this approach:

- **Solving the wrong problem.—**If the problem wasn't completely explored, it may not be defined adequately. The suggested solution might solve only part of the problem or it may fix the wrong problem altogether!

- **Not finding the best solution.—**When the search for possible solutions ends too soon, you may wind up with a mediocre solution when a brilliant one was available and would have been found with a little more discussion.

For more on this topic, see Powerful Presentation Skills downloadable MP3.

Here is a general framework for problem-solving meetings:

- Statement of the problem
- Review of background and objectives
- Idea and solution generation
- Discussion of pros and cons of each selected solution
- Summary of the discussions
- Consensus on a decision
- Agreement on plans to implement the decision

Keep Discussions on Track

Meeting attendees depend on the leader to control the meeting, keep it on track and deal with disruptive elements. Meeting leaders need to be able to recognize and know how to deal with the three general types of meeting participants – what we call the "3 Hs": helpfuls, hostiles and ho-hums.

- **Helpfuls—**Helpful participants are enthusiastic, sometimes to the point of dominating the meeting. Meeting leaders need to acknowledge and show their appreciation for their help while tactfully encouraging them to let others speak. Allow this type to maintain their eagerness but do not let them take over and prevent others from contributing.

- **Hostiles—**Negative participants can damage the productivity of the group, unless appropriately handled. They may work independently on paperwork, talk while others are speaking, or continually interrupt the leader with negative comments. The meeting leader must remain calm when addressing the negative participant. If you have a meeting policy as suggested in the previous section, you might want to review the policy and emphasize any points appropriate to the situation. You can re-emphasize the need for everyone to participate and to respect the opinions of the other participants. You can also address the hostility directly with a comment such as, "John, you seem to be having difficulty with this subject. Would you like to share your thoughts?"

Most important: don't try to argue. Instead, ask the other participants to react to the hostile's point of view.

- **Ho-hums—**These are actually non-participants, who probably include the majority of meeting attendees. Draw these people into the discussion by addressing them by name and asking them open-ended questions. Word your question carefully; don't put them on the spot, just ask for their ideas or opinions.

You can also stimulate participation by requesting a show of hands on an issue or by asking people to write down their ideas on the topic being discussed. Try to get people involved in the meeting's preparation -- ask for suggested topics, supporting documentation and names of possible additional participants.

There are several types of behavior that can lessen the effectiveness of meetings. Here are a few examples of behavior types commonly found at meetings:

- **The Blocker—**Blocking can be conscious or unconscious but it effectively stops the progress of the meeting. The blocker generally succeeds in focusing attention on himself rather than the issue by leading the group off on a tangent and/or continuing to make objections at every possible point.

- **The Aggressor—**Deflates others' status; attacks the group or its values; jokes in a barbed or self-concealed way. The aggressor wants his own way on every issue.

- **The Agenda Hider—**This member is also disruptive because he brings a hidden agenda to the meeting. He wants to achieve a specific result that he never brings out into the open so he supports or blocks an issue using superficial reasoning. When hidden agendas are present, there is a lack of openness and honesty and core issues are seldom addressed.

- **The Joker—**This person shows his contempt for the agenda (or his personal lack of interest) through joking, teasing and disruptive humor.

- **The Dominator—**The attention-seeking behavior of this person can cause disinterest in the rest of the group. The dominator always wants to have the last word, keeping many of the more passive members from speaking up. Members get reluctant about speaking up out of annoyance or the fear of being constantly interrupted.

- **The Avoider—**The avoider strays off subject to avoid commitment or conflict. He may pursue special interests not related to meeting or prevent the group from facing up to controversy through his avoidance tactics.

- **The Help Seeker—**This person uses the group to solve his own problems, which are unrelated to the group's goals. This person often starts a comment with, "While I've got you here..." and then proceeds into a description of his problem and away from the issue facing the group.

Guidelines for handling these dysfunctional behaviors include:

- Confronting the participant in a caring way, being careful to concentrate on the behavior, not the person.
- Pointing out the effects that the dysfunctional behavior is having on the meeting.
- Suggesting alternative behaviors that might be more satisfying for all concerned.

There is a natural tendency for meetings to get sidetracked -- discussion on one topic goes too long, someone brings up a new topic that seems to need immediate attention, a participant is called out of the room, or discussion of a topic stalls for lack of important information. All of these are common challenges faced by meeting leaders. The leader must identify and stay committed to the common objectives of the meeting. The best way to prevent being sidetracked is to maintain a sense of urgency and a clear desire to reach the most appropriate conclusions as quickly as possible.

The leader needs to keep the discussion focused on issues, and to minimize interruptions, disruptions and irrelevant comments. When discussion begins to ramble or go off on a tangent, the leader needs to intercede and get the discussion back on track. Effective meeting leaders develop an arsenal of nonverbal gestures such as the not-so-subtle stare, a raised eyebrow, or a gentle frown, that help them silently communicate their desire to get back on track.

For more on working with different personalities, see The Platinum Rule - 50-page PDF eWorkbook.

Leaders may wish to exercise different levels of control for different types of meetings. Normally more control is exercised when:

- The meeting is oriented more toward information exchange.
- The topic generates strong, potentially disruptive feelings.
- The group is moving toward a decision.
- Time pressures are significant.

There is a wide range of techniques to use if you wish to exert more control over the meeting. You may, for example, permit participants to speak only when you call on them. Another control technique is to comment on or summarize each statement. This prevents interaction, and confrontations, between other individuals. You may also use a flip chart or blackboard to summarize ideas, increasing the formality and decreasing the number of direct exchanges. At times you may want to employ formal parliamentary procedures such as Robert's Rules of Order.

Some of these techniques are obviously not necessary for smaller group meetings. Also consider that although these techniques offer a high degree of control, they do not prevent participants from developing strong feelings, sometimes precisely the result of them being stifled in the first place.

Other less rigid methods can prevent the increased tensions which sometimes arise during more controlled meetings. If the meeting starts to fall off track, a simple glance at the clock can be a reminder that it is time to return to the agenda. Another way to mark progress is periodically to summarize the group's progress, then ask the group if they would prefer to continue the present discussion or to move on in the interest of time.

A short break can revitalize people's willingness to concentrate on the problem. It also serves to cut off old conversations, making it easier to start new ones. It is important that the leader neither overdirect nor underdirect the meeting. The highly structured leader (the most common type) often unintentionally curtails participation in an effort to move quickly and stay on schedule.

At the beginning of the discussion of any item, the leader should make it clear what the objective is for that particular topic. All participants need to understand the issue and why they are discussing it. Someone should introduce the topic, give an overview of why the item is on the agenda and its importance, the current situation, what the needs are, and some indication of lines of inquiry or courses of action that have been suggested or explored, as well as arguments on both sides of the issue.

Encourage a Clash of Ideas

Good meeting leaders maintain a climate of constant inquiry in which all assumptions (including theirs) can be questioned and tested. They encourage different points of view, critical thinking and constructive disagreement. They stimulate creativity and counter the group's desire to reach an early consensus. Productive meetings often involve conflict ... but it should be a clash of ideas, not personalities.

Most meeting leaders will eventually face a situation when voices are raised and tempers flare. While disagreement can be productive, it's important to not let personal hostility escalate out of control. The leader can calm the situation by asking a neutral participant a question requiring a factual answer or by asking someone to recap or summarize both sides of a situation. The leader could recap the points for and against the issue on a flip chart.

The Perils of Groupthink

Meetings are held to focus a variety of ideas and opinions on a topic. One of the critical pitfalls of meetings, even in meetings that appear to be working well, is groupthink. This is especially prominent in groups that meet together over long periods of time. Once groupthink begins to occur, the group no longer explores the depths of an issue. They stay on the surface and opt for easy solutions. They don't challenge ideas and recommendations. Here are some of the causes of groupthink:

- **Illusion of togetherness—**This is the perception that everyone is in agreement. The group begins to take pride in its lack of disagreement and ability to come to rapid decisions.

- **Conformity pressures—**Dissenters are discounted as not being "team players." Dissention is seen as an unhealthy attack on the group.

- **Self-censorship—**Group members keep quiet about negative factors affecting decisions and fail to question the direction of the group.

- **Time pressures—**Time pressures can block deep examination of issues, make people grab at easy solutions and avoid the interpersonal processes that make constructive disagreement possible.

In order to prevent groupthink, the leader should:

- **Legitimatize disagreement—**The leader should promote an atmosphere where members feel free to disagree. Openness has to be encouraged and minority viewpoints need to be given careful consideration. Members should be encouraged to play devil's advocate and silence should not be taken as agreement.

- **Encourage diversity of viewpoint—**Ask for different ideas. Solicit new views. Ask people to point out hidden risks or unrecognized assets.

- **Generate ideas before evaluating them—**Divide discussions into two phases -- generation and evaluation. Prohibit evaluation during the generation stage. Free input of ideas and suggestions should be encouraged and the group should focus on complete understanding of the problem rather than leaping to an easy solution.

- **Discuss the pros and cons of each solution—**In the evaluation phase, weigh the assets and liabilities of each solution.

- **Think through an idea more than once—**Make it a habit to review decisions after enough time has elapsed for them to cool off. Involve as many people as possible in the decision-making process.

- **Examine the group process—**Analyze how the group is dealing with an issue, as well as what the issue is. After each decision is made, examine the process the group used to make it.

Reaching a Decision

There are two major ways for groups to reach a decision at a meeting: voting and reaching a consensus. Voting is the most common choice when a group is large or split over an important decision. The advantage of this option is that it results in a guaranteed decision. It has its drawbacks, however; namely that it creates a win-lose situation for group members, who are required to have a public commitment to the position. Voting can cause certain members to be identified by their minority position on a decision. This often results in them trying to balance their account on the next decision.

On the other hand, consensus is generally a more effective decision-making procedure, but it is more difficult and frequently more time-consuming. The biggest advantage of consensus decision making is that it allows all points of view to be heard, and usually results in a decision that is more whole-heartedly supported by each member. This is especially vital when it comes to implementing the decision later on. Members are less likely to sabotage the decision when they believe their positions have had a complete hearing.

One way of making sure that consensus has been reached is to ask each member if they agree with the decision -- anything less than "Yes" is considered a "No." A person who says, "Well, I basically agree, but..." needs to continue the discussion. He has unresolved reservations or unexpressed disagreements.

A discussion should be closed once it has become clear that:

a. More facts are required before further progress can be made.

b. The issue needs the views of people not present.

c. Members need more time.

d. Events are changing and likely to alter or clarify the basis of the decision quite soon.

e. There is not going to be enough time at this meeting to go over the subject properly.

f. Two or three members can settle the matter without the involvement of the entire group.

At the end of the discussion of each agenda item, the leader should give a brief and clear summary of what has been agreed on. The summary should involve a recap of each action item accepted by a participant. That person should confirm his acceptance of the task.

Ending the Meeting

As the end of the meeting nears, the leader should press for a conclusion. The last few minutes should be used to summarize highlights and decisions, and to restate all agreed upon assignments and deadlines. Always conclude the session on a positive note, for instance, thanking participants for their attendance and contributions. It's important that everyone feel that the meeting accomplished its objectives. If the group needs to meet again, save time by scheduling the meeting while the group is right there.

Post Meeting Follow-up

Take five minutes to evaluate the meeting. Determine what the session accomplished, how the results or findings fit into overall company objectives or plans, and what should be the next logical step. Ask these questions:

- Were the goals of the meeting met?
- Did everyone participate adequately?
- Were the physical arrangements satisfactory?
- What could have been done better?

Remember to distribute the minutes as soon as possible.

Being able to conduct a meeting effectively is a critical communication skill. The benefits of a well-planned and conducted meeting are enormous: identification of solutions to problems, shared ideas and information, development of action plans that have group commitment, and improved team cohesiveness and morale.

Tony Alessandra, PhD, CSP, CPAE

Building Customers, Relationships, and the Bottom Line

Dr. Tony Alessandra helps companies build customers, relationships, and the bottom line. Companies learn how to achieve market dominance through specific strategies designed to out market, outsell, and out service the competition.

Dr. Alessandra has a street-wise, college-smart perspective on business, having fought his way out of NYC to eventually realize success as a graduate professor of marketing, an entrepreneur, a business author, and a keynote speaker. He earned his MBA from the University of Connecticut and his PhD in marketing from Georgia State University.

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