MEETINGS MANAGEMENT TOOLS DEPLOYMENT GUIDE

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Introduction

The Meetings Management Tool Suite is divided into to two different types of tools: Spring Cleaning Tools and Effective Meetings Tools. The Spring Cleaning Tools can be used to *LEAN* an organization's recurring meetings (Phase 1) and then the Effective Meetings Tools can be used to *LEARN* good meeting habits (Phase 2).

To get the best results, the deployment of the meetings management tools should be cascaded throughout the organization, starting with the organization's leadership team all the way down to the first level managers via multiple evaluation tiers. In the first phase of deployment, using multiple tiers enables you to involve a manageable number of key stakeholders in dialogue about the intended and perceived value of the recurring meetings.

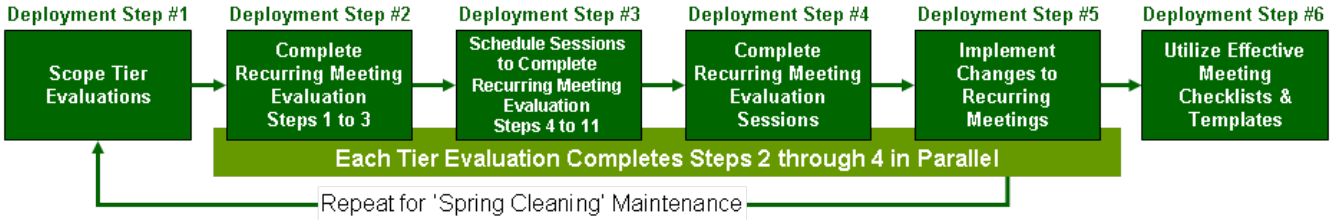

Figure 1: Deployment Step Process Flow

The steps described in Figure 1, above, provide guidance for cascading the Meetings Management tools throughout an organization. The first five steps lead the organization through the Spring Cleaning Process. The Spring Cleaning Process can be used regularly (e.g. semi-annually or annually) to maintain an effective, value-added meeting rhythm. The final step introduces the Effective Meetings Tools, which focus on establishing 'good meeting' habits that will increase the effectiveness and efficiency of individual meeting occurrences.

Deployment Roles

There are four primary roles involved in the deployment of this tool suite. Expectations for each role are summarized below and discussed in greater details in the appropriate deployment steps.

Deployment Roles	Description	Tasks
Organization Executive Leader	Most senior manager within the organizational chain	• Assigning a Deployment Coordinator (see deployment step #1) • Establishing the high-level deployment milestones and monitoring deployment status • Supporting the deployment (e.g., fostering open dialogue during evaluation sessions, modeling effective meeting behavior)
Deployment Coordinator	Assigned by the Organization Executive Leader	• Identifying and communicating required tier evaluations to complete the Spring Cleaning Process (see deployment step #1) • Tracking status of tier evaluations • Aggregating tier evaluation results
Tier Evaluation Owner	Most senior manager in the scope of the tier evaluation as defined by the Deployment Coordinator	• Assigning an Evaluation Coordinator (see deployment step #2) • Leading evaluation sessions (see deployment step #4) • Modeling openness, to encourage leaning their team's meeting rhythm through the Spring Cleaning Process • Supporting implementation of changes to recurring meetings (see deployment step #5) • Supporting development of good meeting habits via use of effective meeting tools (see deployment step #6)
Evaluation Coordinator	Assigned by the Tier Evaluation Owner	• Completing documentation of recurring meeting details in the Spring Cleaning Excel Tool (see deployment step #2) • Scheduling, arranging and facilitating spring cleaning evaluation sessions (see deployments steps #3 and #4) • Reporting overall results of the tier evaluation to the Deployment Coordinator (see deployment step #5) • Implementing changes to recurring meetings (see deployment step #5) • Completing pre/post Effective Meetings Surveys and aggregating responses (see deployment step #6)

Deployment Step #1: Scope Tier Evaluations

Roles Affected: Organization Executive Leader and Deployment Coordinator

To begin, the Executive Leader of the organization should identify a Deployment Coordinator, who will manage the deployment throughout the organization.

First, the Deployment Coordinator should define the scope of each tier evaluation required to complete the Spring Cleaning Process throughout the organization (see Figure 2: Tier Evaluation Example). Within each tier evaluation applicable stakeholders will utilize the Spring Cleaning Excel Tool to evaluate their recurring meetings. The Deployment Coordinator can use the Deployment Tracking Excel Tool to document the tier evaluations by recording the names of the appropriate managers identified as Tier Evaluation Owners.

Next, the Deployment Coordinator should notify the appropriate managers, informing them they have been identified as a Tier Evaluation Owner. The Deployment Coordinator can use the Deployment Tracking Excel Tool to record the completion progress and final results of each tier evaluation (see deployment step #5 for more information). Finally, the Deployment Coordinator can also use the Creating Capacity Progress 4-Square template to present deployment status to the organizations leadership team.

Relevant Meetings Management Tools:

Meetings Management Deployment Guide Bundle

Bundle includes:

- Deployment Guide
- Managing Deployment Checklist
- Spring Cleaning Process Checklist
- Deployment Tracking Excel Tool
- Creating Capacity Progress 4-Square Template

TIP: Scope the tier evaluations to include:

- Two sequential management levels (e.g., executive and senior management or mid management and first line management)
- At most 12 to 15 key stakeholders (e.g., meeting owners, direct reports of the meeting owner, or key representatives from supporting organizations).

TIP: Recommended quantity of tier evaluations for the organization is equal to the number of managers with direct reports at each management level (see example below).

Example:
In the sample organization depicted in Figure 2 (below) we recommend a total of seven (7) tier evaluations to complete the Spring Cleaning Process throughout the organization. The tiers are as follows:

Number of E Tier Evaluations = 1
Tier Evaluation Owner(s): John Doe
Number of M Tier Evaluations = 1
Tier Evaluation Owner(s): Juan Reiz
Number of L Tier Evaluations = 2
Tier Evaluation Owner(s): Jane Smith
Karl Leland
Number of K Tier Evaluations = 3
Tier Evaluation Owner(s): Eric Gauge
Chad Allen
Cilla May

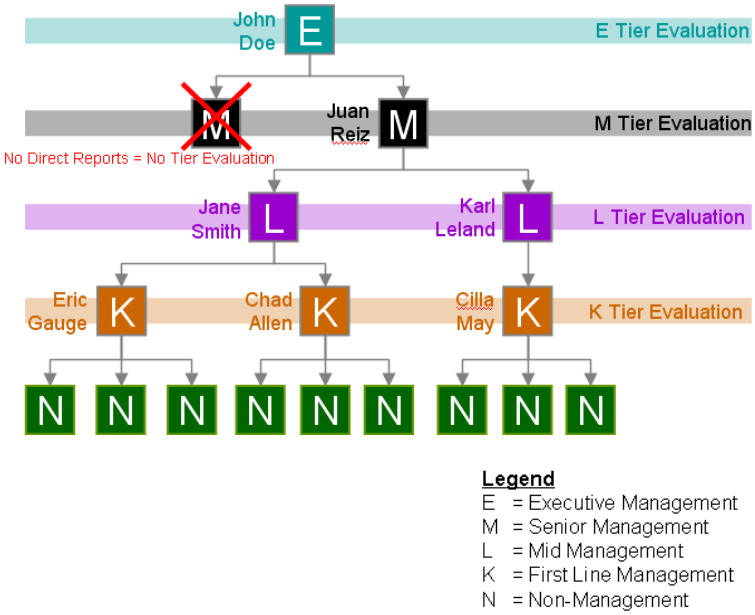

Figure 2: Tier Evaluation Example

Note: Some organization may choose to consolidate tier evaluations. Vertical consolidation may be considered when the group size is small or when there is a smaller quantity of recurring meetings. Horizontal consolidation may be considered when groups at the same management level have identical sets of recurring meetings. In all cases, the Tier Evaluation Owner should always be the most senior manager. Finally, if tier evaluations are consolidated, the Deployment Coordinator should inform the Tier Evaluation Owner which additional managers are included in the tier scope to ensure all relevant recurring meetings are included in the evaluation process and documented in the Spring Cleaning Excel Tool.

- Vertical Consolidation Example*:* Assume that the organization portrayed in Figure 2 is small. In this case, it may be more efficient to group more than two levels of management into a single tier evaluation. For example, consolidate the E and M tier evaluations into a single E tier evaluation owned by the executive.
- Horizontal Consolidation Example: Assume that the two first line managers reporting to Jane Smith in the organization portrayed in Figure 2 have similar recurring meetings. In this case, it may be more efficient for Chad and Eric to evaluate their recurring meetings together in a single consolidated K tier evaluation.

Deployment Step #2: Complete Recurring Meeting Evaluation Steps 1 to 3

Roles Affected: Tier Evaluation Owner and Evaluation Coordinator

The next step in deployment of the Meetings Management tools is for each Tier Evaluation Owner to begin the Spring Cleaning Process for the meetings within the defined scope of their defined tier. To do this, the Tier Evaluation Owner should assign an Evaluation Coordinator, whom will be responsible for initiating and managing the process for the tier.

The first responsibility of the Evaluation Coordinator is to download a copy of the Spring Cleaning Excel Tool. Their second responsibility is to completely document the meeting details (evaluation steps 1 to 3 in the Spring Cleaning Excel tool) for all the recurring meetings owned by the Tier Evaluation Owner. This documentation enables:

- The Evaluation Coordinator to schedule the evaluation sessions (deployment step #3)
- The relevant stakeholders to complete the evaluations of the recurring meeting during the evaluation sessions (deployment step #4)

Relevant Meetings Management Tools:

Spring Cleaning Excel Tool

Specifically the:

- Reference information documented in the 'Before You Get Started' worksheet
- Meetings Details (Steps 1 to 3) worksheet

TIP: Use separate Spring Cleaning Excel Tool files for each tier evaluation. Having separate files enables multiple tiers to work the Spring Cleaning Process in parallel.

TIP: Plan for 2 to 3 min per recurring meeting to complete the documentation of meeting details (evaluation steps 1 to 3).

Example:
In our sample organization (see Figure 2: Tier Evaluation Example in deployment step #1), you would have seven MS Excel files: one file for the E Tier Evaluation, one file for the M Tier Evaluation, two files for each of the L Tier Evaluations and three files for each of the K Tier Evaluations.

Note: In the event that tier evaluations are consolidated (see deployment step #1) be sure meeting details (evaluation steps 1 to 3) have been documented for all relevant recurring meetings.

Deployment Step #3: Schedule Sessions to Complete Meeting Evaluation Steps 4-11

Roles Affected: Evaluation Coordinator

The next step is for the Evaluation Coordinator to schedule and arrange the evaluation sessions. During the evaluation sessions key stakeholders will complete the evaluations for each of their recurring meeting. The dialogue required to complete the evaluations is the key enabler to determining if any gaps exist between the intended and perceived value of each meeting.

Relevant Meetings Management Tools:

Spring Cleaning Excel Tool

Specifically, the number of recurring meetings documented in the Meetings Details (Steps 1 to 3) worksheet.

TIP: Plan for 2 to 3 minutes per recurring meeting to complete evaluation steps 4 through 11.

TIP: Schedule 1-hour evaluation session(s). Typically, no more than 3 sessions are required to completely evaluate all of your recurring meetings.

TIP: Key stakeholders should be invited as 'required participants' to the evaluation session. Key stakeholders are typically the Tier Evaluation Owner's direct reports as well as those individuals that have matrix relationships supporting the Tier Evaluation Owner.

TIP: If the Tier Evaluation Owner has a large number of direct reports, consider including a representative portion of the team members as required participants.

TIP: Recommend keeping the required participants at a maximum of 12 to 15.

Deployment Step #4: Complete Recurring Meeting Evaluation Sessions

Roles Affected: Evaluation Coordinator and Tier Evaluation Owner

In this step, the Tier Evaluation Owner leads the evaluation session(s), modeling openness to drive the dialogue necessary to complete the evaluations. The Evaluation Coordinator facilitates the session(s), documenting the evaluation responses in the Spring Cleaning Excel Tool. The tool guides the dialogue, enabling the stakeholders to identify and make changes to close any gaps between intended and perceived value.

Relevant Meetings Management Tools:

Spring Cleaning Excel Tool

Specifically the:

- Reference information documented in the 'Before You Get Started' worksheet
- Purpose (Steps 4-7) worksheet
- Participants (Steps 8 & 9) worksheet
- Freq & Dur (Steps 10 & 11) worksheet

TIP: Review the meeting details documented in evaluation steps 1 through 3. Then proceed on to evaluation steps 4 through 11 for one recurring meeting before moving to the next. This will ensure all session participants clearly understand which recurring meeting is being discussed. Refrain from making changes during the review as this data represents the baseline.

Deployment Step #5: Implement Changes to Recurring Meetings

Roles Affected: Evaluation Coordinator and Deployment Coordinator

Once the evaluation of all relevant recurring meetings is complete, the Evaluation Coordinator should ensure all appropriate meeting notices are updated to implement the documented changes. The Evaluation Coordinator should also report the estimated savings to the Deployment Coordinator. The estimates are available on the Summary worksheet in the Spring Cleaning Excel Tool. At a minimum the following estimates should be emailed to the Deployment Coordinator:

- Total estimated labor hours saved for required management participants per week
- Total estimated labor hours saved for required non-management participants per week
- Total estimated labor hours saved for optional participants per week

The Deployment Coordinator should record the reported savings values in the Deployment Tracking Excel Tool, which will aggregate the savings to provide an organizational roll-up for inclusion in the Creating Capacity Progress 4-Square.

Relevant Meetings Management Tools:

Spring Cleaning Excel Tool

Specifically the Summary worksheet.

Meetings Management Deployment Guide Bundle

Specifically the:

- Deployment Tracking Excel Tool
- Creating Capacity Progress 4-Square Template

TIP: The Summary worksheet provides a cumulative estimated labor hours saved per week. This value represents the amount of time that can be booked towards the management time savings target.

Deployment Step #6: Utilize Effective Meeting Checklists & Templates

Roles Affected: All

Once the Spring Cleaning Process (Phase 1) is completed, attention can be refocused on ensuring each meeting occurrence is as efficient and effective as possible. In order to do this, checklists, templates and process flows have been provided via the Effective Meetings Tools.

In order to measure the impact of the Effective Meetings Tools, the Evaluation Coordinator should distribute the Effective Meetings Survey pre and post deployment. The pre-deployment survey captures a baseline of how efficient and effective the team perceives meetings to be. The post-deployment survey enables you to view the delta change, providing a quantitative measure of the implementation success.

An excel version of the survey (Sup_Mtgs_EffectiveMeetingSurvey.xls) is provided in the Deployment Guide Bundle. Before the team begins using the Effective Meeting Tools, the Evaluation Coordinator should administer the pre-deployment survey. The post-deployment survey should be distributed by the Evaluation Coordinator no earlier than one month after the team has started using the Effective Meeting Tools. For both surveys the Evaluation Coordinator can use the Aggregate Survey Excel Tool (Sup_Mtgs_AggregateEffectiveMeetingSurvey.xls), also provided in the Deployment Guide Bundle, to aggregate and chart the responses of the entire team. Samples of the survey and output chart are provided in Figure 3 and Figure 4, respectfully (see below).

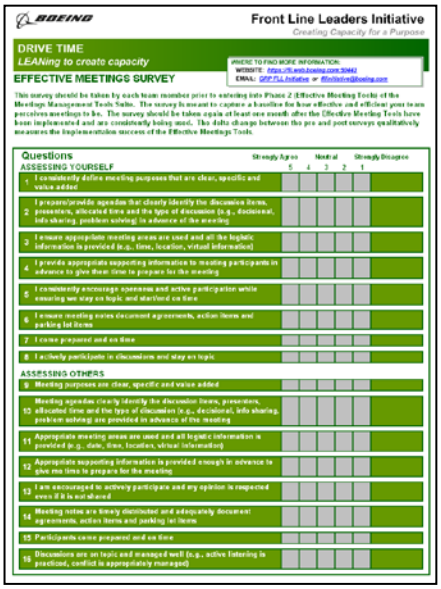

Figure 4: Effective Meetings Survey

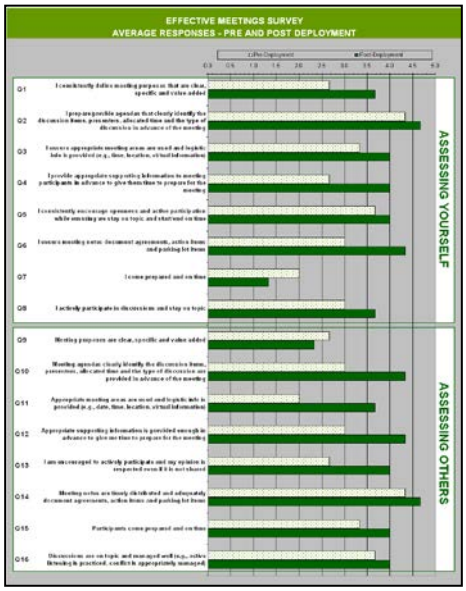

Figure 3: Effective Meetings Survey Output Chart

The Effective Meetings Tools consider four different roles an individual can play in a meeting:

- Meeting Owner – responsible for initiating, defining and managing the meeting
- Meeting Coordinator – takes actions to complete the logistical arrangements for the meeting
- Presenter – takes actions to support specific meeting agenda item(s)
- Participant – take actions to support the purpose and objectives of the meeting

The Effective Meetings Tools consider the 'life-cycle' of the meeting—identifying three phases:

- Before the meeting – includes defining the need for the meeting, planning the meeting and understanding the expectations for other meeting roles (e.g., presenter and participants)

- During the meeting – includes having the actual meeting
- After the meeting – includes all meeting follow-up activities

Figure 5, shown below, lists each of the decision trees, checklists and templates included in the Effective Meetings Tools bundle. Also identified are the targeted meeting role and meeting phase.

Relevant Meetings Management Tools:

Meetings Management Deployment Guide Bundle

Specifically the:

- Effective Meetings Survey (excel file)
- Aggregate Survey Excel Tool

Effective Meetings Tools

The bundle includes:

- New Meeting Decision Tree
- Participant Attendance Decision Tree
- Planning an Effective Meeting Checklist
- Running an Effective Meeting Checklist
- Participating in an Effective Meeting Checklist
- Presenting in an Effective Meeting Checklist
- Meeting Follow-up Checklist
- Meeting Notes Template
- Agenda (summary view) Template
- Agenda (detail view) Template

	Owner	Coordinator	Presenter	Participant
Decision Trees				
New Meeting Decision Tree	*B*		*B*	
Participant Attendance Decision Tree				*B*
Templates				
Agenda (Summary View) Form	*B, D*	*B, D*	*B, D*	*B*
Agenda (Detail View) Form	*B, D*	*B*	*B*	*B*
Meeting Notes Form	*B, D*	*B*	*B, D*	
Checklists				
Planning an Effective Meeting	*B*	*B*		
Presenting in an Effective Meeting			*B, D, A*	
Running an Effective Meeting	*D*	*D*	*D*	
Participating in an Effective Meeting				*B, D, A*
Meeting Follow-Up	*A*	*A*		

B = Before the Meeting; D = During the Meeting; A = After the Meeting

Figure 5: Effective Meetings Tools Matrix

TIP: When copying data out of the 'For Aggregation Purposes' worksheet in an individual Effective Meetings Survey excel file into the 'Input Data Here' worksheet in the Aggregate Survey Excel Tool be sure to use **PASTE SPECIAL / VALUES**.