Death by Meeting

By Patrick Lencioni

# Overview

This book provides a fictionalized account of a company struggling with horrible meetings and working to turn this around. The story is about 200 pages long and actually is somewhat enjoyable to read. It is followed by a 30 page summary of the important take-away points that focus on the two biggest problems of bad meetings:

1. They lack drama
2. They lack structural context

**Plot Summary**

Yip Software is struggling with a horrible weekly staff meeting. None of the executives want to attend, and everyone who does show up just gets bored to death for 2 hours. The CEO and his executives jump from topic to topic without reaching any conclusions on anything.

This is the state of affairs when the CEO decides to take the company public, and the stock is acquired by a larger company. The larger company sends one of their executives to inspect the company, and he makes it clear to the CEO of Yip Software that his meetings are horrible and if he doesn’t improve them he will be let go.

The CEO had just taken on a new assistance – a young kid who attended business and film school and is trying to figure out where he wants to start his career. The assistant sits in on these meetings and begins to step in and offer criticism and help as they work to improve their meetings. Using a comparison to films, the assistance makes two interesting observations:

1. Meetings are the same length as films, yet everyone would rather see a movie than attend a meeting.
2. There are different types of television and film (the news, sitcoms, miniseries, and feature movies) each with a defined purpose and format, and it doesn’t make sense to mix these in one sitting.

For the first point it is presumed that movies are more interesting because they have conflict and drama that pulls us in. If a movie does not capture us in the first 10 minutes we tune out, and if there isn’t any conflict, there is nothing to keep us engaged for the rest of the movie. Meetings should be more interesting to us than movies. Unlike movies, we get to be active participants in the meetings (we don’t get to tell actors on screen what to do), and also the results of the meeting become actionable and affect our careers and even our very livelihood. We have much more personally invested in the result of a meeting than we do in the outcome of a movie, and there is no reason that they should be less interesting to us. They key is to express the importance of the meeting early on, to propose a conflict that needs to be resolved, and to continually “mine for conflict” among the group – making sure everyone gets to express their opinion, especially if it contradicts the current consensus.

To the second point, he points out that each of the television/movie formats can be related to a different type of meeting:

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| --- | --- |
| Drama | Format |
| Daily Check-In | Daily headline news (5 minutes) | |
| Weekly Tactical | Weekly sitcom or crime drama (1 hour) | |
| Monthly Strategic | Movie (2 hours) | |
| Quarterly Off-Site Review | Mini-series (6 hours or more) | |

Mixing these together could confuse participants. It’s difficult to switch between tactical and strategic mindsets, and it’s also difficult to have some of these meetings without adequate preparation. The intern ends up suggesting that each meeting be held on a different schedule and limited to topics and time limits suggested above (more detail on this in the review section).

Ultimately, the CEO at Yip is able to show that he has improved his meeting management skills, and the meetings at Yip become more relevant, engaging, and productive. He also learns that the threat to oust him wasn’t entirely serious. Instead, the acquiring company makes a habit of sending their consultant out and finding the weak areas in which a company needs to improve and effecting change in those areas. The executive who had threatened to let him go becomes CEO of the parent company, and the two become friends.

**Review: The Model**

Meetings are ineffective for two primary reasons:

1. They lack drama
2. They lack structural context

Detail on each of these is provided.

## Problem #1: Lack of Drama

Meeting should be more interesting then movies for 2 reasons:

1. Meetings are interactive (you can participate and change the course of the meeting when you can’t talk to the characters in a movie and tell them what to do)
2. Meetings are directly relevant to our lives – they have an impact on our future work, the success of our businesses, and even our very livelihood.

However, meetings that lack drama and conflict fail to engage their audience and easily get boring and feel irrelevant. Meetings can be just as interesting as movies if people are able to:

1. Hook the audience in the first 10 minutes
2. Mine for conflict to keep everyone engaged

The leader kicking off the meeting is responsible for “the hook.” Instead of beginning with a boring, usual opening, try something different. Instead of beginning “Turn to page 12 where you can see last year’s budget numbers…” try something like:

“I know that the next couple of hours might be tedious, and that there are hundred other things we’d all rather be doing right now. But let’s keep a few things in mind while we’re here today. First, our competitors are hoping we get this wrong. They’re hoping we under-allocate resources for advertising, or hire too many administrative staff. And our employees are desperate for us to get this right, because every decision we make today has a profound impact on someone’s job, not to mention their morale. In their minds, our credibility is on the line. And finally, I don’t want to be sitting at my desk nine months from now thinking ‘Why didn’t I pay closer attention during the budget review?’ So let’s sit forward in our seats and do this right so we can feel good about it for the rest of the year.”

Once they are hooked and begin to engage, you will need to keep them engaged. You can do this by mining for conflict. If there is no conflict, there is no reason to have a meeting. If everyone is in agreement there is nothing to discuss. If an issue is worthy of discussion there must be conflicting views, and it is your job to make sure those get expressed. Make sure everyone says what they are thinking, especially if it goes against the current consensus. A lot of people will need help and encouragement to do this. The leader of the meeting can do a lot to help this by supporting the first person to express a conflicting opinion. Say something like:

“Before you continue, and I definitely want you to continue, I just want to say that this exactly the kind of things I was talking about when I said we need to start engaging in more conflict. And even though it can be frustrating for you, it’s everyone/s job to raise questions and concerns so that we can make the outcome better.”

A little affirmation like this can go a long way.

## Problem #2: Lack of Structural Context

Having one meeting where you discuss everything is a recipe for disaster. Instead, you should have four different types of meetings:

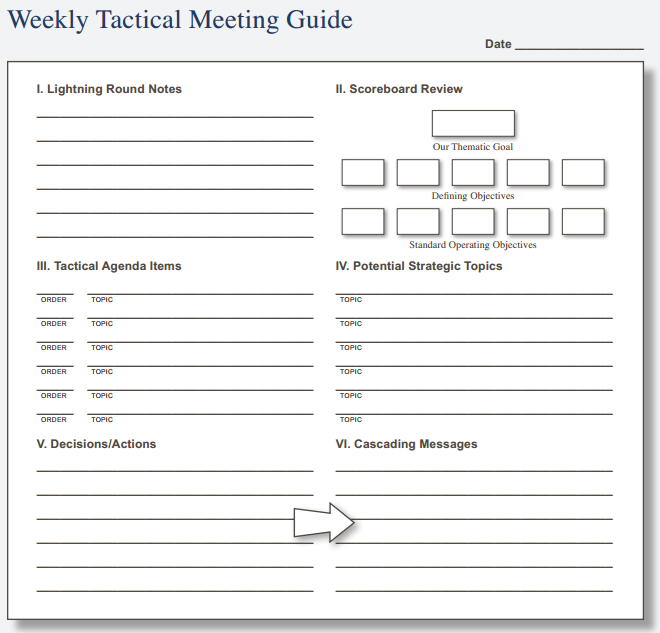
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| --- | --- |
| Daily Check-In | While not always practical for every organization or group, it can be helpful to have a 5-minute “check-in” each day to see what everyone is trying to accomplish that day. These 5 minutes give a chance to clarify any questions people have and can greatly reduce emails and phone calls later. It can also prevent overlap of work and help identify issues that might require greater discussion.  Challenges:   * Sticking with it initially – if you’re going to try this specify that you will try it for 2 months. Give it long enough to work. * Keeping it to five minutes – having these meetings while standing up is a good way to limit time. Any issue that requires greater discussion should be moved to the weekly meeting. |
| Weekly Tactical | This meeting should be held once a week (or every two weeks) to discuss short-term, tactical issues. A suggested format is:   1. Lighting Round – everyone gets 60 seconds to give their top 2 or 3 priorities for the week. 2. Progress Review – a brief (5 minutes?) review of operational status. 4-6 status indicators should be sufficient. More than that will just complicate things. 3. Real-Time Agenda – once everyone is informed of the week’s priorities and the current status, the team should set their agenda for the meeting. It is important to set the agenda with everyone’s input after they are informed rather than bringing in an agenda that might be irrelevant.   Challenges:   * Temptation to set an agenda ahead of time – don’t do it * Too much detail during the lightning round – keep it to 60 seconds * Discussions about long-term, strategic issues – put these in the parking lot and wait for a strategic meeting to discuss these. Don’t try to shift gears from tactical to strategic. Waiting for a dedicated meeting will give everyone time to prepare and focus on a strategic issue – since these are the more important issues a team must make. Give your strategy the attention it deserves. Don’t change it ad-hoc due to short-term, tactical concerns. |
| Monthly Strategic | This meeting is one where executives wrestle with, analyze, debate, and decide on critical issues. Meeting once a month is a good habit, to make sure that you don’t get caught up in operational activities and forget to strategize. You can also call ad-hoc strategic meetings as necessary if an issue arises that requires immediate attention. Good practices include:   * Keep the meeting limited to 1 or 2 strategic issues * Allow enough time (at least an hour per issue) and go longer if needed. * Distribute the agenda as far ahead of time as possible to give team members time to gather data and prepare   Challenges:   * Failure to schedule enough time * Putting too many items on the agenda * Failure to do research and preparation * Fear of conflict |
| Quarterly Off-Site | An off-site meeting (either quarterly or annually) is a chance to get away from the day-to-day activities and focus on the big picture. It is a great time to perform:   * Comprehensive strategy review – strategic direction should be reviewed 3 to 4 times a year. (once is too little, and every day or week is too much). * Team Review – the executives should assess themselves and their behaviors as a team. A change of scenery often helps this so that executives can interact on a more personal level and get out of their daily norms and routines. * Personnel Review – executives should talk about their key personnel so that everyone is aware of top performers and poor performers. Talking about this gives a chance to provide feedback and present alternate views that may refute a biased perception. * Competitive and Industry Review – take a look at what competitors are doing and what is happening in the market. This is a chance to identify trends and frame the information that leaks in over time in a comprehensive way.   Challenges:   * Tendency to overburden and over-structure the meeting – try to stay away from tightly-scheduled slide presentations and lengthy informational sermons. The purpose of the off-site is to reflect and discuss the state of an organization – not to provide white papers. * Too much of a boondoggle – the purpose of an off-site is to step away from the day-to-day distractions. An exotic location may offer even more distractions. Usually, just going an hour or two away is sufficient to get away from work. * Inviting outsiders to attend – be careful inviting outsiders since any outsider will change the team dynamic and could stifle communication. Occasionally, an experienced mediator or facilitator is helpful, but not always. |

Also, it is important to get rid of the belief that having meetings is bad. Having more meetings (especially the short, 5-minute check-ins) can actually prevent a lot of redundant work, phone calls, emails, and questions later on.

# Resources

The Four Types of Meetings

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| --- | --- | --- | --- |
| Meeting Type | Time Required | Purpose and Format | Keys to Success |
| Daily Check-In | 5 minutes | Share daily schedules and activities | * Don’t sit down * Keep it administrative * Don’t cancel even when some people can’t be there. |
| Weekly Tactical | 45-90 minutes | Review weekly activities and metrics, and resolve tactical obstacles and issues. | * Don’t set agenda until after initial reporting. * Postpone strategic discussions. |
| Monthly Strategic | 2-4 hours | Discuss, analyze, brainstorm, and decide upon critical issues affecting long-term success. | * Limit to one or two topics. * Prepare and do research. * Engage in good conflict. |
| Quarterly Off-Site Review | 1-2 days | Review strategy, industry trends, competitive landscape, key personnel, team development. | * Get out of office. * Focus on work; limit social activities. * Don’t overstructure or overburden the schedule. |



SOURCE: <http://www.tablegroup.com/books/dbm/Weekly%20Tactical%20Meeting%20Guide.pdf>

This guide is reproduced in the back of the book, except that in section 2 they list 5 key goals/metrics (one on each line), with checkboxes next to them for:

* Behind
* On Target
* Ahead
* Unknown

I think I actually like the book format better.

**Comments**

## Problem-Solving Paradigm

It always seems like great insights in business are really just common sense (although we never seem to be able to figure that out by ourselves). In this case, I think all the author really did in terms of meetings was ask these questions:

1. What are your current practices?
2. What are the goals of these practices?
3. Are these practices meeting these goals?
4. Why not? And what would?

It seems common sense afterwards to realize that we have four different goals/needs and four different types of meetings to address these goals:

|  |  |
| --- | --- |
| Meeting | Goal |
| Daily meetings | What are today’s priorities/goals/activities? |
| Weekly meetings | What are the priorities/goals/activities this week? |
| Monthly meetings | What are the long-term (6 months to a year priorities/goals/activities)? |
| Quarterly/Annual meetings | What is the “big picture?” What is the competitive environment like and where is it going? What goals and direction should we set for the next year or several years? |

Breaking up a problem into smaller parts (daily, weekly, quarterly, annual planning) and then determining the best course of action to address each part seems like a strategy for success given any problem – not just meetings.

## The CAO Team

The CAO team actually has a couple of these meetings in place. We have our daily check-ins, our period review meetings, and the annual events hosted by G.O. for the CAO/Shrink managers.

While the author suggests we should stand-up during the check-in and strictly limit time to 5 minutes, I don’t know if I agree. We enjoy our social time (which the author said was OK), and having it right before lunch keeps us from running too far over. In a building full of IT introverts, having a time to force socialization might actually be a good thing in its own right.

We don’t have weekly tactical meetings, but we could probably manage to have these on Monday’s instead of the stand-up. Maybe schedule half an hour and go over the week’s activities? This would be a good time to do burn-down charts for development and review support metrics.

We do have monthly meetings, but they’re not at all strategic. Lately, I’ve been hijacking the period notes meetings to do informational talks and bring up directions that I think the group should go in. We could try to open these to more strategic discussions, but I don’t know how well that would actually play. I don’t know if long-term strategic considerations are really as much in our hands as they would be for an executive group. There are times where we can direct our own destiny, but these aren’t very often. This is something that I would normally just discuss with Joe – although we should bring in the group if there really is room for discussion.

I really like our annual meetings, but I think they sometimes suffer from over-scheduling and a preset agenda. They do have a good balance of presentations, discussion times, and team activities. The best way to improve them would probably be to start with an informational status report of key metrics and then have the participants set the agenda for the break-out meetings. What issues do we think need to be addressed? This might get better buy-in from the group and a sense of urgency/importance. Jonathan and Ed could still sprinkle in a few of their pre-set discussion items as well and get them on the agenda.

We also don’t have annual team meetings for just IS&S. Annette holds quarterly and annual meetings, but these are really just knowledge-dumps and a selection of presentations from different parts of the business. Nick’s meetings and Chris Hjelm’s meetings (both the annuals and quarterlies) are the same. Really, I suspect that IS&S leaders are having the meetings that are described in the book (at least I hope they are). They probably just restrict them to managers only. The meetings that we know they’re having are:

* Annette’s weekly (or period?) meetings with her managers – this would be a good chance to do the tactical and strategic meetings discussed in the book. It’s a shame the team leads don’t get to go though. You think they would at least need us for the strategic meetings – or that they could perhaps publish notes of what they discussed.
* Annual personnel reviews (ranking everyone and putting together a list of “rising stars.”)
* Several off-sites
  + Annette has some
  + The executives from G.O. and the divisions have their “leadership retreat” which sounds a lot like what they described in the books