

Effective Meetings

Today's agenda

- Intro 5 min
- Meeting fundamentals 15 min
- Meeting roles & responsibilities 10 min
- Effective participation & moderation 10 min
- Effective note-taking 10 min
- **BONUS** tip for capstone success 3 min (time-permitting)

Attribution



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CarpentryCon @ Home: Week 4

How to Run a Meeting

Led by Greg Wilson

6 August, 16:00 UTC



What is the main purpose of meetings?

Also discuss: For which purposes are meetings often unnecessary?

Meeting fundamentals

Does there even need to be a meeting?



Does there even need to be a meeting?

- **To inform?** Send an email instead
 - Gives people more time to digest and formulate questions
 - Only have “info meetings” if you are expecting a discussion or live Q&A
- **To consult?** Only if people get a vote
 - Not if you are going to execute your plan regardless of the feedback
 - Then it’s just informing with pretense
- **To discuss?** Yes
 - The most efficient way to reach a decision is often real time conversation
 - But only in small groups (<7, or with well-defined procedural rules)
- **To collaborate?** Yes, but not necessarily a meeting...
 - Sprint, hackathon, peer programming

Create an agenda

- **Circulate the agenda before the meeting**
 - No agenda = No need for a meeting
 - Live document that team members can add to up until the meeting
 - Include questions you want participants to answer
- **Include timings**
 - Forces you to be realistic with what you can cover
 - Account for discussions
- **Humanize**
 - Social check-in
- **Prioritize**
 - Address any elephants
 - Eat your frogs
- **Plan for short meetings**
 - ~45 - 60 min, start & end on time



Be on time



Be specific



Example agenda outline

1. Social check-in

- Go around the room: How is everyone doing today?

2. Elephants

- Items that might distract from the other discussions
- “I know this is on everyone’s mind so let’s talk about it first”

3. Frogs

- The most important items to get through today
- Can include progress updates where needed

4. Progress updates

- Review action items from last meeting

5. Discuss remaining **specific** items

6. Action items

- Repeat any assignments made during the meeting discussions
- Assign someone to all remaining tasks

How should you reach
decisions in a meeting?

Have clear rules for making decisions

- The tyranny of structurelessness
 - <https://www.jofreeman.com/joreen/tyranny.htm>
- Power structures
 - Every group has them
 - No rules = implicit and unaccountable power structures
 - Clear rules = explicit and accountable power structures
 - Make it clear who made which decision and why
- Robert's Rules
 - Good for large groups such as parliaments, senates, etc.
 - Training required
 - Time-consuming

Martha's Rules

- **Proposal with sponsor (similar to a PR)**
 - Short writeup of the proposal at least a day before the meeting
 - Gives participants time to think before the meeting
 - A record of why and how you reached a decision
- **Sense vote (+1, 0, -1)**
 - If no one objects, proposal passes with brief or no discussion
- **Discussion as needed**
- **Binding vote (+1 or -1 only)**
- **But don't overdo it!**
 - Not every agenda item needs a proposal
 - Don't spend hours writing proposals for small items
- **Resources**
 - Two proposals I made in the past: [#202](#) & [#345](#)
 - [Issue templates](#)
 - [More info on Martha's and Robert's rules](#)

Meeting roles & responsibilities

Meeting roles

The Moderator

- Moves the group through the agenda in a timely manner
- Hands out the word and ensures people are not interrupted
- Interrupts when needed to keep the meeting on time
- Encourages contributions from all meeting participants
- Follow the Code of Conduct and teamwork contract

Eimear Noone



Meeting roles

The Notetaker

- Records key decisions, conclusions, and action items
- Distributes notes after the meeting
 - So people who weren't there know what happened
 - So people who were there agree what happened
 - So people can be held accountable at later meetings



Meeting roles

The Timekeeper

- Keep track of when to move on
- Helps the moderator with logistics, such as whiteboards, AV setup, etc
- Can be combined with the moderator as a single role for small meetings
 - Start this way for Capstone



Meeting roles

The Participant

- Everyone is a participant in a meeting
- Can't have a good meeting without good participants
- Reviews the agenda before the meeting
- Actively contributes to the discussion
- Let's others contribute to the discussion
- Is respectful to their meeting colleagues
- Respects the agenda and time constraints



Rotate meeting roles



Effective participation & moderation

Inefficient meeting participation



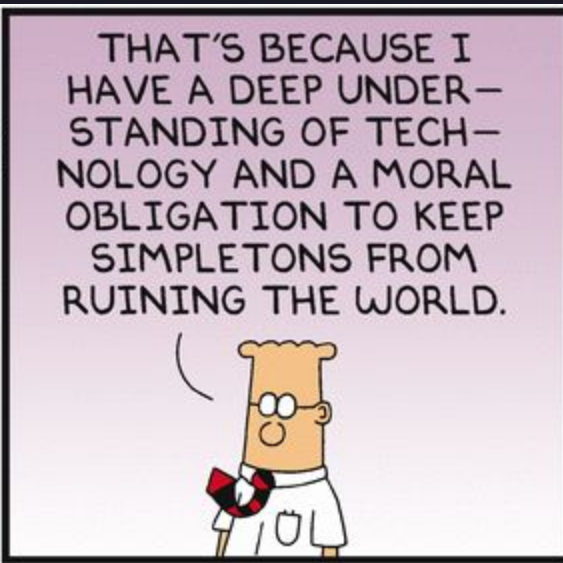
Participate effectively & respectfully

- The goal is to **learn and reach decisions**, not to “win”
- Allow others to **question your line of reasoning**
 - Work towards solutions together
 - Make your colleagues' points as strong as possible
- **Don't interrupt others**
 - “X was speaking, let's let them finish and we will come back to you”
- **Don't ramble**
 - “Take some time to collect your thoughts and we will come back to you”
- **Don't be on your phone, etc.**
- **Read the agenda beforehand**
- **Decline often**
 - Save energy for meetings where you are needed
 - Only if you're OK with what is decided in your absence

Don't be "that person"





Dilbert.com DilbertCartoonist@gmail.com








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Dealing with “that person”



 Dealing with Disruptive Behaviors 


Talkative Arrogant


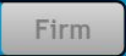

Complaining Eager Argumentative


Shy Diverting


Indecisive Apathetic Dominating



 Dominating Shark 

Description ▼
The shark is aggressive and focused on efficiency and the task. [More](#)



Intervention  

Be firm, but not threatening; be friendly:

“Sharky, I can tell you care deeply about this topic, and I would like to capture what you have said in the marina [parking lot], and then hear what others think. Let’s use a round robin to hear from others, and please save your next idea for the next round.”

 Shy Clam 

Description ▼
The clam is shy and quiet, passive, and task-focused. [More](#)

Intervention  

If intervention is necessary, consider communicating with the clam individually. Using the clam’s name, ask for his or her thoughts:

“Clam, do you have any points to add to the discussion?”

Allow Clam time to answer, even if it takes longer than is comfortable:

“Please let Clam respond”

“Clam has the floor.”

Strategies for distributing the word

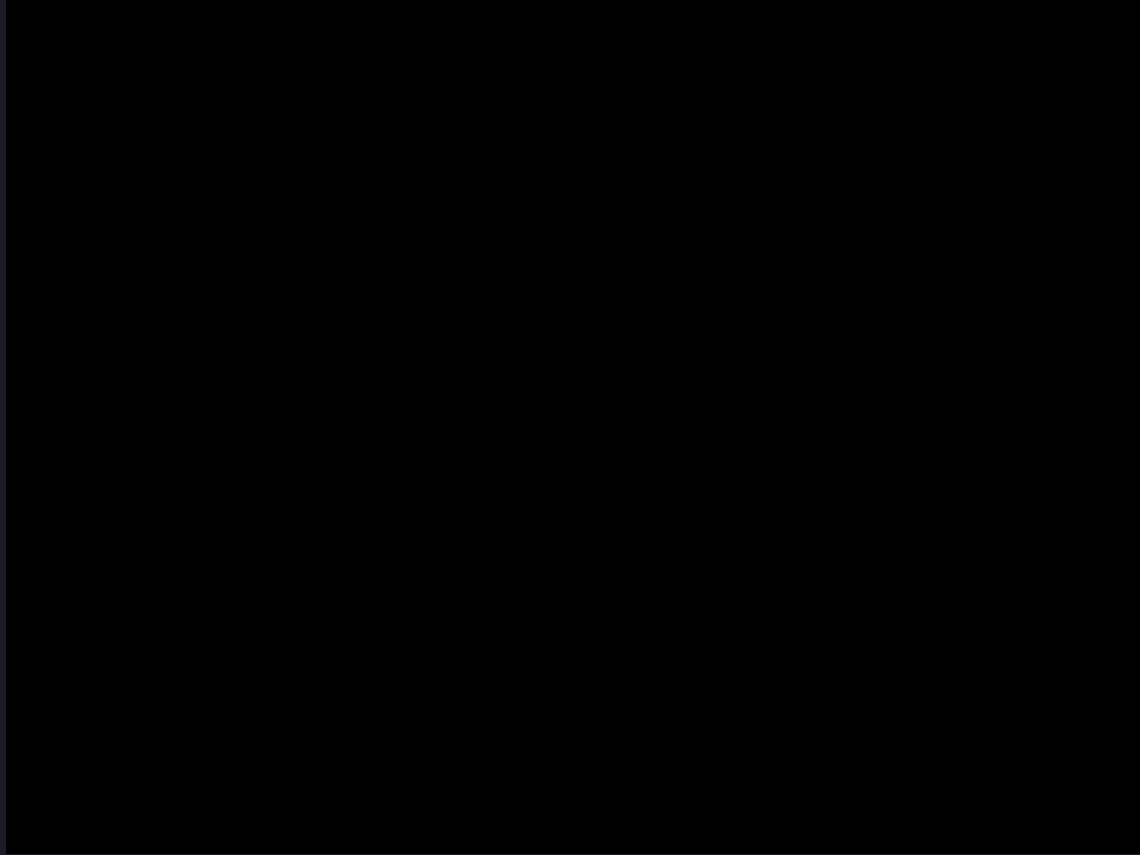
- Speaking often does not correlate with knowledge
- Most will adjust their behavior once they recognize it
- **Stickies/tokens**
 - Everyone gets three, once you have used them you can't speak.
- **Interruption bingo**
- **External moderator**
 - Less confrontational

Effective notetaking

What to write in meeting notes?

- Summary of discussions
- Decisions/Conclusion
- Action items
 - If everyone is responsible, no one takes responsibility
 - Assign clear, actionable tasks to specific persons
 - Even if it is a team task, make one person in charge of it
 - Use GitHub task lists and issues
 - But don't write directly in the issue
- Agenda items for next meeting
 - Separate issue or at the end of the meeting notes
 - Anyone can edit the issue to add items throughout the week
 - Link an issue if more description is required

Meeting notes example on GitHub



Resources



<https://www.askamanager.org/>

Capstone tip

See the forest

- **Remember the business question**
 - Statistical questions are just part of this
 - Understand how your statistical questions fall short of the bigger picture
- **Communicate in the partner's words**
 - Not just data science jargon
- **Start with "Good enough" (MVP)**
 - Perfect later based on partner feedback
- **Have a timeline with milestones**
 - It's OK if it evolves over time
- **Be professional**
 - On time, don't ghost questions, etc









ACCORDING TO
EINSTEIN, TIME FLOWS
MORE SLOWLY IN
MEETINGS THAN IT
DOES IN EMPTY SPACE.



DOGBERT, I NEED YOUR
HELP. I KEEP GETTING
INVITED TO WORTHLESS
MEETINGS AND I CAN'T
SAY NO.



