Running effective meetings, running effective groups

Meetings are effective if they meet the objectives of each person involved in the least amount of time possible. Different strategies are needed for different types of meetings. Different leadership styles are necessary depending on the members' personality preferences and the stages of the group's development. Good leaders know how to adapt to these preferences and stages. Key words: *meetings, group process, leading*

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"I KNOW we're all empowered now. I know we need to reach consensus decisions in our teams. But if I have to go to one more meeting with this group, I'll scream! Don't they know I have real work to do?"

Sound like anyone you know? Today's health care managers and supervisors spend as much as 75 percent to 80 percent of their lives in meetings and often 100 percent of their decision making is done in a group setting. That is too much time and too much energy to spend without a productive outcome.

The best meetings are effective because they meet the objectives of each person involved and they do so in the least amount of time possible. The purpose of this article is to increase the number of committees, task forces, and teams that are able to do just that: meet everyone's objectives in the least possible time.

PREFERENCES

Each person joining a group for the first time comes with certain questions: Why are

we doing this? What are we supposed to accomplish and by when? How fast can we get finished with this? Who else will be here and why am I being included? Whichever questions are foremost in one's mind will often define the success or failure of the group encounter.

Carl Jung, a Swiss psychoanalyst, taught that each of us is born with a preference for how we gather data and a preference for how we make decisions. He believed some people had a preference for taking in information from the external environment through their five senses. Others preferred to sort through information available to them internally and come forth into the environment with information intact. The first preference type he called "sensing" and the second, "intuiting."

Once information was available to the conscious mind, Jung said we also had preferences for the manner in which we made decisions. Some used a logic-based, rational approach illustrated by phrases like "first, note . . ." or "summarizing the data leads to the conclusion. . . ." This preference he called a preference for "thinking." Other people made decisions based on valuing, using language such as "good," "right," and "important" when explaining the decision. This preference he called "feeling."

Each person, Jung believed, had a preference for sensing or intuiting and also a preference for thinking or feeling. These preferences remained with the person throughout life and affected interactions of all sorts.

Isabel Myers popularized Jung's theory with the development of the Myers-Briggs Type Indicator, an inventory widely used in supervisory development programs.[1] The terms "sensor," "intuitor," "thinker," and "feeler" are now part of health care management's shared vocabulary. When each of these "types" approaches a task team or social group, he or she comes into the experience with a different set of preferences for how interactions should occur and how work could best be accomplished. Meeting the needs of all four of these types is what enables a group leader to run an effective meeting and develop a high performance team.

Think about taking a vacation with your family or a group of friends. Intuitors will want to understand what the purpose of the trip is before they begin to plan. Is it for fun, relaxation, exploration, or continuing education? Thinkers will buy maps, evaluate currency exchanges, and start comparing calendars. Feelers will want to be sure everyone is involved in the planning discussions and will look for destinations that are sure to have something to please everyone. Sensors will probably be on their way before the rest finish their first planning meeting, happily oblivious to cost, the need for reservations, or other mundane details.

Each of us has parts of all these types in us but Jung says one decision-making style and one information-gathering style predominate in each of us. In groups, those different styles can complement each other to the benefit of the whole. Or they can distract and irritate each other to the detriment of both task and relationship issues.

MEETING THE NEEDS OF EACH STYLE

Since the definition of a successful meeting is one that meets the needs of each member in the least amount of time possible, we must not only understand the differences in preference, but we must also know how to adapt our meeting management skills to these differences. The effective team leader

operates with all four preferences in mind as the leader plans and coordinates the team's encounters.

The intuitor

People who Myers and Briggs call "intuitors" have a need to know the "why" of any activity. Being asked "to what end" or "what is the meaning" are other clues that one is dealing with an intuitor. For these people the group leader must do one simple but critical thing: before creating the group or team, the leader should convey the purpose of the gathering clearly and concisely to those invited. This should be done orally first and then in writing and should be repeated aloud at the first group meeting. Some teams post the group charge in the meeting room each time they gather to help ensure that the essential focus is maintained.

If this basic need for clarity of purpose is not met early in the group's life, intuitors will be heard to say things like "Just a minute, I'm not sure what we're doing here. Let's back track . . . ." This is not usually a problem for the team at the beginning but when it continues to occur in the seventh or eighth team meeting, it becomes a source of tension and irritation, particularly for those action-oriented people who are well on the way, at least in their view, to completing the task.

The thinker

People who bring preferences for structure or logic into the group believe psychological safety, productivity, and efficiency occur through clear rules and guidelines. Thinkers benefit from answers to questions such as: How often are we going to meet? How long will each meeting last? How many meetings do we anticipate needing? Thinkers also value meetings that start and end on time;

meetings where necessary materials are sent out in advance for perusal; and meetings where assignments are made to be completed between meetings and accounted for during subsequent sessions.

The arrangement of the meeting space is important to thinkers. For an informational meeting, one in which information is to be provided to the group with little feedback desired, theater style chairs with writing surfaces all facing frontward is recommended. When problem solving or discussion is desirable, a circle or horseshoe shape with individual writing surfaces and flip-chart or white-board accessibility are recommended. The leader must also ensure the room is large enough for all to see and hear the proceedings and, in the case of discussion groups, be seen and be heard during the proceedings.

Those with a preference for logic are encouraged by team leaders who publish goals and objectives with clear results and measurable time lines. A quick review at the beginning or end of each meeting greatly assists members in staying focused on the task and motivates them to continue even when progress seems minimal.

Thinkers work best with agendas and minutes. A suggested form for an agenda is included in Table 1. Regardless of format chosen the following should be included in each agenda: the name of the group; the date and time of the next meeting; the topics to be discussed or presented and who is responsible; whether the item is for information only or for decision making; and approximately how long each segment is expected to last. Many quality improvement teams include two additional pieces that might benefit other committees as well: meeting evaluation and tentative agenda setting for the next session.

Table 1. Suggested agenda format

CUREALL HOSPITAL, INC. QUALITY IMPROVEMENT COMMITTEE MARCH 23, 1995 0800–0930 ROOM 3045A			
Topics	**Person responsible**	**Information or action**	**Time allotted**
Minutes	Leader or scribe	Action (approval needed)	5 minutes
Report on assignments	List each person reporting	Information	10 minutes
Review of audit	Guest speaker	Information	25 minutes
Next steps	List names for each assignment	Action	10 minutes
Meeting evaluation	Leader	Action	5 minutes
Future agenda items	All members	Action	5 minutes

Minutes flow easily from well-designed agendas. A proposed format is included in Figure 1. Regardless of format chosen, remember that minutes are the official record of what occurred and are often subject to scrutiny from others outside the team. Maintaining the balance between saying too little and saying too much is often difficult and is one reason for adopting a consistent form of recording independent of whomever happens to be the scribe. All minutes must include those present, both members and guests. Whether to list those who were absent is an issue that differs among groups. Doing so sends a message; the question is, is that a message the group wants to send? Whatever the decision, it should be consistent throughout the life of the group. Minutes must also include what happened, what decisions were made, what assignments were made, and what due dates were agreed upon. The most effective teams also list the time and date of the group's next meeting and a tentative agenda as part of their minutes.

Finally many thinkers like to use a set of rules such as "Robert's Rules of Order." A short summary of "Robert's Rules" is included in the box titled "Basic Parliamentary Information." Regardless of the guidelines adopted, the group needs to be apprised of those guidelines at the beginning of the group's life together and the leader needs to ensure the rules are followed consistently.

Sensors: The action seekers

While the intuitors are getting clear on purpose and the thinkers are developing operating guidelines, the sensors on the team will be doing something, sometimes anything, just to be moving. The easiest way to ensure the needs of these team members are met is to expeditiously finish the charter and goal setting, make assignments at each meeting, and follow up on those assignments at the beginning of the next meeting.

Action-oriented people keep groups from getting paralyzed by their own process. They provide energy and enthusiasm. They may

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│                        Cureall Hospital, Inc.                         │
│                   Quality Improvement Committee                       │
│                      Minutes of March 23, 1995                        │
│                                                                       │
│  Members present:                                                     │
│  Guests present:                                                      │
│                                                                       │
│                                                                       │
│  Agenda item    Discussion    Action/recommendations    Follow-up date│
│                                                                       │
│                                                                       │
│                                                                       │
│  Next meeting: April 25, 1995 in room 3045A at 0800                   │
│  Submitted by: Name of scribe or recorder                            │
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Figure 1. Proposed agenda format.

also pull the group off track, distracting others from the real task in their need to do *something* and to get finished.

Agreeing upon a decision-making process for the committee is an important step in helping sensors become full contributors to the team. The first possibility is "decision-by-plop." "Plops" are decisions that are thrown onto the table as if they were obvious and agreed upon but receive no response from other participants. The person tossing the plop may think the decision has been accepted; others may ignore it completely. Time, energy, and initiative are wasted in second-guessing and rework.

Plops are often initiated by group members who have more formal power than other group members. Cutting off discussion, saying "don't you think...," and sending withering nonverbal commentaries may also be efforts at decision-by-authority. There are times when authoritarian decision making is appropriate. For example, in managing a patient in cardiac arrest, there is not time for negotiation; clearly someone needs to take charge and the orders need to be carried out without question. But problem-solving teams rarely exist in this state of emergency and the tendency to fall back on authoritarian edict is usually not helpful to effective group functioning.

Decisions made by majority rule are common in many groups. Majority rule simply means that more than half of the people present vote for (or against) an idea. This form of decision making is easy, familiar, and efficient. However, danger awaits if the wishes and preferences of the minority are ignored. Then the process can result in withdrawal, mutiny, or sabotage by the disgruntled parties.

Consensus decision making is recommended by quality improvement experts. Consensus requires each member of the group to agree to agree. The solution may not

Consensus decision making is recommended by quality improvement experts.

Basic Parliamentary Information

Procedures for handling main motions

1. Obtaining the floor
   A. Member rises when no one else has the floor and addresses the chair by correct title, e.g., "Madame President."
   B. Member remains standing and waits recognition by the chair.
2. Bringing a motion before the group
   A. Member makes the motion: "I move that . . . ."
   B. Another member, without rising, seconds the motion: "I second it."
   C. The chair restates the motion: "It is moved and seconded that . . . . Is there any discussion?" (Or "Are you ready for the question?")

Rules governing debate

The term "debate" applies to the discussion in an assembly on the merits of a pending question or motion. Every member has the right to speak to every debatable motion before it is finally acted upon. The right cannot be interfered with except by a two-thirds vote. Until a matter has been brought before the assembly in the form of a motion proposing a specific action, it cannot be debated.

1. Each member may speak twice on the same question on the same day.
2. No member may speak a second time on the same question if another member wishes to speak on it for the first time.
3. A member who has spoken twice on the same question on the same day has exhausted his right to further debate unless permission is given by the assembly.

4. No speaker may speak longer than 10 minutes at a time. In answer to a question during debate, the time is taken from the speaker's time.
5. Debate must be confined to the merits of the pending question.
6. Speakers must address their remarks to the chair, avoiding personal remarks.
7. Speakers should refer to officers by title and avoid, if possible, the mention of members by name.
8. The chair should not enter into debate except in small boards and committees.
9. The chair may not interrupt a speaker if rules are being followed and no disorder arises.
10. The chair cannot stop debate. Only the assembly can with a two-thirds vote.
11. The maker of a motion cannot speak against it but may vote against it.
12. No member should disturb the assembly by whispering or walking across the floor of debate.

Decorum in debate

1. Confine remarks to merits of the pending question or motion.
2. Refrain from attacking members' motives.
3. Avoid using members' names in commenting on motions.
4. Without consent a speaker cannot read a paper.
5. When the chair finds it necessary to speak, the member interrupted should sit down.
6. Members must refrain from disturbing the assembly or hampering transactions of business.

Source: Robert's Rules of Order, Newly Revised, New York, N.Y.: Harper & Row, 1989.

represent the opinion an individual had going into the discussion, but it does represent something each member can and will live with and support after discussion is closed.

Consensus development is the most time-consuming form of decision making but it provides for the strongest form of support during the implementation phase.

Unanimity is total agreement by all members. Unanimity rarely occurs in problem-solving groups and rather than being indicative of group cohesiveness, may actually signal "group think" or unquestioning abdication to the opinions of others.

Feelers: The caring people

Although fewer people seem to be driven primarily by feeling preferences, attention must be paid to these people as well. Meeting the needs of these team members is no more superfluous or "soft" than dealing with other preferences, but rather a means of creating productive outcomes in later stages.

Feeling-oriented people are the folks who remember to bring rolls and coffee to the meetings, and they notice if you do the same. Feeling people are the ones who understand the importance of celebrating little successes along the way and help bolster the morale of the group. Feeling people are the ones who

notice when not everyone has had a chance to be heard. They remember who was having a difficult week and ask how things are going. They are the ones who know the history of the hospital, the department, the patient, and the family. They are also the ones who are often late to meetings, have to be reminded not to get stuck on old "war" stories, and may have a hard time remembering to keep commitments—not from a lack of caring but from a lack of organization.

Understanding the stages of group development helps a leader meet the needs of the feeling person as well as others in the group. Table 2 outlines the four stages of group process identified by Tuckman in 1965 and adds a fifth stage identified more recently by quality improvement teams.[2] Each stage has necessary task and people issues to be addressed. Each stage represents a different maturity level, and each stage requires different behavior on the part of the leader.[3] Group

Table 2. Stages of group development

Stages	Task behavior	Relationship behavior	Maturity level	Leadership style required
Forming	Orientation to task, people, expectations	Identity of self in relation to team members and leader	Inexperienced	Telling
Storming	Responding to demands of task	Hostility toward leader and team-mates	Inexperienced but energized	Selling
Norming	Opinion gathering	Rules and culture of group developed	More experienced but not yet confident	Participating
Performing	Finding solutions, taking action	Interdependence	Experienced and committed	Delegating
Adjourning	Termination of task	Disengaging as a group	Experienced but unwilling	Selling

effectiveness requires that the leader be able to manage the task and people issues of each stage effectively.

UNEXPECTED AND DIFFICULT SITUATIONS

Even when the committed leader prepares for different members' preferences, there are times when individuals may act out in ways detrimental to the productivity of the group. Experience indicates 90 percent to 95 percent of typical meeting problems can be prevented through careful planning. For the remaining 5 percent to 10 percent, further action is required. The box titled "Unexpected and Difficult Situations" offers sug-

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Unexpected and Difficult Situations

Dominating members
  Ask direct questions to other team members
  Avoid eye contact with the dominating member
  Have a private chat with the dominating member during the break or between meetings
Argumentative members
  Stay cool
  Listen objectively
  Encourage other members to handle the argumentative comments
  Be direct in expressing your opinion
Chatting members
  Determine what might be the cause
  Invite them to share with the entire group
  Pause and hold extended eye contact until they quiet
  Slowly move toward them as you speak to the rest of the group
Silent members
  Target them with specific questions they will answer successfully
  Use small groups to increase discussion
  Evaluate the meetings anonymously
Personal attacks from members
  Handle the attacker outside the group
  Determine the cause
  State the impact the behavior is having on the group
  Ask for a specific change in behavior

Members' and Leaders' Responsibilities

Members' responsibilities
1. Come prepared
2. Keep an open mind
3. Listen
4. Criticize ideas, not people
5. Take notes
6. Don't blindside the leader
7. Understand the value of diverse opinions
8. Seek clarity when you don't understand
9. Honor the commitments you make to the team
Leaders' responsibilities
1. Understand the charge or purpose of the group
2. Ensure goals, objectives, and timelines are developed
3. Choose an appropriate environment for meetings
4. Keep track of time
5. Ensure all members are heard and respected
6. Manage dysfunctional members
7. Summarize the decisions and assignments made at each meeting
8. Understand group process and member preferences in information collecting and decision making
9. Publish the proceedings of the meeting
10. Communicate with the group's sponsors or senior managers

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gestions for dealing with members who try to dominate every discussion, who argue every point proposed, who hold side conversations with others during the meeting, who never speak up until after the session, and who make personal attacks on the leader or other group members.

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In closing, the leader's role in creating and maintaining an effective group is crucial. The leader must understand the task issues, the relationship issues, and the phases inevitable in group development. Members also have responsibilities to do their homework,

support the functioning of the entire team, play by the established rules, and value diversity in style and opinion. (See the box titled "Members' and Leaders' Responsibilities" for a summary of members' and leaders' responsibilities.)

The degree to which the leader and the members understand each others' preferences for collection of information and decision making is the degree to which meetings will be able to meet all the members' needs in the least amount of time. Empowerment and consensus will be something more than jargon terminology, and "real" work will get accomplished more efficiently and more effectively.

REFERENCES

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