OPTIMIZE MEETING EFFECTIVENESS: HOW TO GET RESULTS
Presented By

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YOUR GOOD MEETING
GOODIE BAG

Do You Actually Need a Meeting?

Effective Meetings Checklist

Meeting Etiquette

When Meetings are Remote

Know Your Meeting Types

Leading and Participating in Meetings

A meeting is an event where minutes are taken, and hours are wasted.

We will continue having meetings until we find out why no work is getting done.

I’m pretty sure the dinosaurs died out when they stopped gathering food and started having meetings to discuss gathering food.

If I die, I hope it’s in a staff meeting because the transition to death would be so subtle.

YOU ARE NOT ALONE.
THE AGENDA FOR THIS MEETING IS TO TRY TO FIGURE OUT WHY WE’RE HAVING THIS MEETING.

ELEMENTS OF A BAD MEETING

ELEMENTS OF A BAD MEETING

- Starting late or people joining late
- Purpose unclear: could this be an email?
- No agenda or not sticking to it
- Unrealistic or overcrowded agenda
- Key decision-maker missing
- Unsure who is in charge or bad facilitation
- Waste of time; not sure why you are there
- Rudeness or tangents tolerated
- People talking over each other and not listening to each other
- No end goals or next steps stated
- Hidden agenda
- Quiet types left out
- One person with a bad attitude drains all the energy out of the room
- Technology not working
- Meetings that run over time

FEELINGS
AFTER
BAD
MEETINGS

Savage Chickens
by Doug Savage

YOU NEED TO CHANNEL YOUR ANGER INTO SOMETHING MORE CONSTRUCTIVE, LIKE...

RAGE?
FEELINGS AFTER BAD MEETINGS

- Annoyed about wasted time
- Frustrated
- Confused: what am I doing here?
- Uncertain about next steps
- Demoralized
- Feeling like no listening to you
- Feeling sabotaged by others
- Disappointed things weren’t accomplished
- Resentful – you’ve prepared, and others didn’t
- Out of sync from co-workers
- Tired and worn down
- Feelings of failure if things go wrong when you’re in charge

Economic impact of bad meetings, TED
Economic impact of bad meetings, TED

HOW MUCH **MONEY** DO MEETINGS COST?

**ESTIMATED TO WASTE**

$37 BILLION A YEAR in the U.S.

A recent 360 company estimates losses in excess of **$75 MILLION** per year due to poor meetings.

A meeting between several managers or execs may cost upwards of **$1,000 PER HOUR** in salary costs alone.
Economic impact of bad meetings, TED
Meetings are an essential part of your day-to-day operations as well as an expression of your organization’s culture.

Meetings are essential for enabling collaboration, creativity, and innovation. They often foster relationships and ensure proper information exchange.

When done well they provide real benefits: saving time and money as well as improving organizational effectiveness.
THE SCIENCE OF SUCCESSFUL MEETINGS

A Deep Dive into the Science of EFFECTIVE Meetings

We Need Meetings
But we need them to be better

Set Limits on Updates
Be intentional with your time

Train your leaders to facilitate

Meetings/day directly impact burnout

We Need Owners
You don't have to do it all
Diversity means nothing without engagement

Have Agenda
Agenda owners

? Agenda as Questions
ID your meetings officer

Start & End on time
Build in buffer time

Be a steward of time
Never default to one hour

Manage Meeting Size
Start Strong & Act as host

Ask for Meeting Feedback
Post Meeting Surveys

Collect Insights Ahead of Time

Dyadic Pairs Enable New Voices

Mayfield

STEVEN ROGELBERG, AUTHOR, THE SURPRISING SCIENCE OF MEETINGS

https://www.stevenrogelberg.com/
The cascading positive effects of improving just one meeting each day, across people and time, yields not only tremendous organizational benefits – from cost savings to better organizational strategy – but also individual feelings of satisfaction, engagement, and accomplishment.

The Surprising Science of Meetings, Steve Rogelberg
DO YOU NEED A MEETING?

Ask yourself why you're having the meeting.

If you can’t say what your meeting will accomplish, you shouldn’t have it.

Is it because you always have it? Is it necessary, or has it outlived its usefulness or purpose?

A canceled meeting is much better than one that wastes everyone’s time.

Could it be an email or a memo?
NO
MAS

How to Save the World (or at least yourself) from Bad Meetings, David Grady, TED Talks
There is a reason and a purpose for the meeting

Agenda created and shared in advance

There is a leader for the meeting or facilitation plan in place

Right people in the room or zoom

Type of meeting is clear to everyone

Good meeting etiquette required; meeting will start and end on time

Time is reserved for next steps and follow up is clear
“A written agenda, distributed in advance, is the single best predictor of a successful meeting.”

3M Marketing Team, authors of the book, Mastering Meetings
MEETING AGENDA...
A MINI STRATEGIC PLAN

- Be a steward of your meeting.
- Don’t skip the agenda or make it a laundry list.
- Avoid recycled agendas with new dates.
- Use key questions rather than one-word topics.
- Leave time to wrap up effectively and end with an action plan and next steps.
- WWW: “Who does What by When?”


- How will we reduce our spending by 100K by the end of the fiscal year?

- What are the key ways of improving overall response time to customers by 25%?

- Where are we vulnerable from a leadership turnover and how might we address these vulnerabilities?

- What is the key market threat we need to be aware of, how could it affect us, and what can we do about it?”

- What key pieces of information do each of you have to share or need from one another?

**KEY QUESTIONS BRING FOCUS TO AGENDAS**

How to Create the Perfect Meeting Agenda, Harvard Business Review
• List all potential topics.
• Eliminate items that can be handled outside the meeting.
• Re-list remaining items by importance.
• Determine process to cover each topic and then estimate time to run process.
• Only include topics that fit allotted time.
## Objective

The objective of the meeting is to discuss and make key decisions that need to be made.

### Time Box

<table>
<thead>
<tr>
<th>Time</th>
<th>Topic</th>
<th>Presenter</th>
<th>What’s Needed?</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00</td>
<td>Item 1: Key word or strategic question to be answered</td>
<td>Designate</td>
<td>I, D, A</td>
</tr>
<tr>
<td>9:10</td>
<td>*note any related materials for this topic (hyperlink or attach)</td>
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<td></td>
</tr>
<tr>
<td>9:20</td>
<td>Item 2: Key word or strategic question to be answered</td>
<td>Designate</td>
<td>I, D, A</td>
</tr>
<tr>
<td>9:30</td>
<td>*note any related materials for this topic (hyperlink or attach)</td>
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</tbody>
</table>

### Context + IDA

- **WWW: Who does What by When?**
  - Key Takeaways
  - Actions and responsible individuals
  - Notes or preview of next meeting (including topics to cover)

### Preparation

- Adjust

### Wrap Up: WWW
ESTABLISH BEHAVIORS TO OPTIMIZE INPUTS
OUTPUTS (RESULTS) WILL FOLLOW

Information
Generate accurate and relevant data that is understood by all stakeholders

Decision
Establish standardized processes aligned across the business for making high-quality, timely, and effective decisions

Action
Apply decisions quickly and consistently to create tangible progress

MEETING ETIQUETTE BASICS

- Start and end on time
- Start the meeting well
- Establish norms
- Actively facilitate
- Use tools, such as timers or breakout rooms
- Kill all distractions

9 THINGS NOT TO DO IN A MEETING

- Show up late
- Be unprepared
- Monopolize the conversation
- Make your statements sound like questions
- Misread signals
- Be off topic
- Get intimidated
- Keep your cell phone on and look at it
- Blow off the meeting

“Listen, I’m no expert, but I still want you to listen to me ramble on about this for a while.”
10 Ground Rules for Meetings

1. **Show up on time and come prepared**
   - Be prompt in arriving to the meeting and avoid unnecessary breaks.
   - Be prepared to contribute to achieving the meeting's goals.
   - Come to the meeting with a positive attitude.

2. **Stay mentally and physically present**
   - Be present and don't allow non-meeting business to interfere.
   - Listen attentively to others and don't interrupt or have side conversations.
   - Treat all meeting participants with the same respect you would want from them.

3. **Contribute to meeting goals**
   - Participate actively by sharing ideas, asking questions, and contributing to discussions.
   - Share your unique perspectives and experiences, and speak honestly.
   - If you notice a problem or disagree with a proposal, try to offer a solution.

4. **Let everyone participate**
   - Share the floor so that all can participate.
   - Be patient when listening to others speak and do not interrupt them.
   - Respect each other's thinking and value everyone’s contributions.

5. **Listen with an open mind**
   - Value the learning from different minds, and listen to get smarter.
   - Stay open to new ways of doing things, and listen for the future to emerge.
   - You can respect another person’s point of view without agreeing with them.

6. **Think before speaking**
   - Seek first to understand, then to be understood.
   - Avoid using jargon, informal acronyms, and phrases that can be misinterpreted.
   - It’s OK to disagree, respectfully and openly, and without being disrespectful.

7. **Stay on point and on time**
   - Respect the group’s time and keep comments brief and to the point.
   - Avoid rambling; do not bring up topics unrelated to the meeting.
   - Do not waste everyone’s time by repeating what others already said.

8. **Attack the problem, not the person**
   - Respectfully challenge the idea, not the person.
   - Share or judge others' work, but focus on the solution, not the person.
   - Constructive feedback is necessary to get the best results.

9. **Close decisions and identify action items**
   - Make sure decisions are supported by the group, otherwise they won’t be acted on.
   - Note pending issues and schedule follow-up meetings as needed.
   - Identifying actions based on decisions made, and follow-up actions designed to you.

10. **Record outcomes and follow up**
    - Record issues discussed, decisions made, and tasks assigned.
    - Share meeting reports with meeting participants.
    - Share meeting outcomes with other stakeholders that should be kept in the loop.
BEST PRACTICES FOR VIRTUAL MEETINGS

- Provide attendees with the tools they’ll need:
  - Purpose Statement, Participant List, Agenda
- Ensure everyone knows how to use the technology; when in doubt call in as back up
- Keep camera on when possible
- Assign clear roles
- Set ground rules
- Try for interactivity:
  - Learn and use technology tools such as polling, chat, can even do breakouts on virtual calls
- Embrace the bumps and weirdness
- Don’t go too long; you may find that meetings can be shorter than in-person ones


What It Takes to Run a Great Virtual Meeting, Harvard Business Review
UPDATE: Information Sharing
The purpose is for the host or attendees to share new or key information with each other, like a project status update, scheduled events for the next week, or what everyone is working on.

DISCUSSION: Brainstorming
A working session to come up with ideas or solutions, like ways to approach a new topic or business area, potential solutions to a tricky problem, or new areas to take the business.

ACTION: Decision Making
By the end of the meeting, you want the group to have made a decision on a certain topic. For example, whether to hire a candidate, accept a proposal, or establish a new process.
## Want a good meeting? Begin by clarifying the goal.

<table>
<thead>
<tr>
<th>Type of Meeting</th>
<th>Typical size</th>
<th>Typical characteristics</th>
<th>Typical outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>Decision meeting</td>
<td>6 to 8 attendees</td>
<td>Structured agenda identifies decision(s) to be made, Decision makers have been identified and are in the room, Active facilitation</td>
<td>Action</td>
</tr>
<tr>
<td>Discussion meeting</td>
<td>8 to 20 attendees</td>
<td>Structured agenda identifies discussion topics, Active dialogue by attendees</td>
<td>Consideration</td>
</tr>
<tr>
<td>Information-sharing</td>
<td>2 to 2,000+ attendees</td>
<td>Agenda clarifies topics for information sharing, although additional items may arise during the meeting, One-way communication from speaker</td>
<td>Awareness</td>
</tr>
</tbody>
</table>

**McKinsey & Company**

*Want a better decision? Plan a better meeting, McKinsey*
<table>
<thead>
<tr>
<th>Team Cadence</th>
<th>Progress Check</th>
<th>One-on-One</th>
<th>Action Review</th>
<th>Governance Cadence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weekly Team Meeting</td>
<td>Project Status Update</td>
<td>Manager One-on-One</td>
<td>Retrospective</td>
<td>Board Meeting</td>
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<tr>
<td>Daily Huddle</td>
<td>Portfolio Review</td>
<td>Coaching Session</td>
<td>Win/Loss Review</td>
<td>Quarterly Strategy Refresh</td>
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<tr>
<td>Working Session</td>
<td>Stakeholder Update</td>
<td>Mentoring Session</td>
<td>Rehearsal</td>
<td>Client QBR</td>
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<td>“Catching Up”</td>
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<td>Idea Generation</td>
<td>Planning</td>
<td>Workshops</td>
<td>Problem Solving</td>
<td>Decision Making</td>
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<tr>
<td>Solution Brainstorm</td>
<td>Project Planning</td>
<td>Design Workshop</td>
<td>Root-Cause Resolution</td>
<td>Strategic Opportunity Decision</td>
</tr>
<tr>
<td>Ad Campaign Ideas</td>
<td>Product Development Planning</td>
<td>Team Building</td>
<td>Incident Response</td>
<td>Candidate Selection</td>
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<tr>
<td>Requirements Brainstorm</td>
<td>Campaign Planning</td>
<td>Value Stream Mapping</td>
<td>Plan Reset</td>
<td>Final Approval</td>
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<td>Event Planning</td>
<td>Kickoff</td>
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<td>Chartering</td>
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<td>The Taxonomy of Business Meetings</td>
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<td>Sensemaking</td>
<td>Introductions</td>
<td>Issue Resolution</td>
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<td>Investigations</td>
<td>Sales Call</td>
<td>Support Escalation</td>
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<td>Informational Interview</td>
<td>First Interview</td>
<td>Contract Negotiation</td>
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<td>Market Research</td>
<td>New Hire Introduction</td>
<td>Dispute Resolution</td>
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<td>User Testing</td>
<td>Investor Pitch</td>
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<td>Discovery</td>
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<td>Community of Practice</td>
<td>Training</td>
<td>Broadcasts</td>
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<td>Meetups</td>
<td>Skills Certification</td>
<td>All-Hands Meeting</td>
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<td>Safety Committee</td>
<td>New Hire Training</td>
<td>Webinars</td>
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<td>Lunch-n-Learn</td>
<td>Client Training</td>
<td>Press Briefing</td>
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https://blog.lucidmeetings.com/blog/16-types-of-business-meetings
The meeting's purpose will influence its time limit, too. A weekly status report meeting in front of a Kanban board, for example, is easier to run in 15-30 minutes than a monthly meeting including a presentation would be.
EFFECTIVE MEETING LEADERSHIP

- Do the necessary work before & after
- Keep everyone involved
- Suspend judgment when necessary
- Be clear on how decisions will be made
- Make sure next steps are specified
5 elements of good meeting facilitation

1. Time Management
- Keeps track of time and paces the meeting effectively, given the big picture of the agenda.
- Does not rush through an emergent issue that truly needs to be discussed.
- Recognises if an issue raised is best addressed at subsequent meeting.
- Keeps conversation flowing. Recognises a tangent, and pulls back what needs to be discussed.

2. Active Listening
- Keeps clarifying and summarizing where things are and collects people's input so that everyone understands the process and the discussion at hand.
- Listens carefully for underlying concerns and helps bring them out so that they can be dealt with constructively.
- Keeps engaged with the note-taker so that issues, actions, and takeaway are recorded and not lost. Confirms accuracy with attendees.

3. Conflict Management
- Encourages conflict around ideas, then actively embraces and manages the conflict so that positive benefits for performance and decision-making ensue.
- Maintains an environment where people are comfortable disagreeing. Invites debate.
- Deals with disrespectful behaviour quickly through re-direction, comments around staying constructive, and reminds attendees of ground rules.

4. Ensuring Active Participation
- Actively draws out input from others. Keeps mental track of who wants to speak and comes back to them.
- To keep an attendee from dominating the conversation, uses body language (e.g. subtle small hand movement to stop) and transition statements (e.g. “thank you for that”).
- Keeps side conversations at bay by reigning folks in when they lose focus.

5. Pushing for Consensus
- Tests for agreement. A consensus to get a sense of where attendees are at, but does not unduly put unnecessary pressure on others to reach a conclusion when not ready.
- Knows when to intervene assertively in the meeting process and provide direction when to let the process run as it is.
- Is an honest broker of the conversation at hand and does not privilege his or her viewpoint or ideas in the discussion. Works to remain impartial.

https://www.stevenrogelberg.com/
Most people do not listen with the intent to understand. They listen with the intent to reply.

“Most people do not listen with the intent to understand. They listen with the intent to reply.”
Provide input when appropriate

Actually listen

Come prepared (improved agendas help)

Reserve judgment: try “What I like about / What concerns me” technique
Meeting Preparation Summary

- Made sure you need a meeting?
- Identified specific purpose of the meeting?
- Developed & sent an agenda?
- Selected the right participants?
- Assigned roles to participants, if needed?
- Identified meeting type and how decisions will be made?
- Prepared yourself and others (with background information)?
- Have a wrap up plan: WWW: WHO does WHAT by WHEN?

PROTECT YOUR TIME!
EFFECTIVE MEETING CHECKLIST

- Are you sure you need a meeting? Know the purpose?
- Is there an agenda and has it been shared in advance?
- Is the agenda realistic and achievable?
- Do you know who is leading the meeting? Are roles assigned?
- Do you know the meeting type and how decisions will be made?
- Is there a commitment to meeting etiquette?
- What preparation is needed in advance?
- Are the right people included?
- Ready to end the meeting? Use WWW: Who does What by When?

Created by Jennifer Phillips, Meduri Consulting
Visualization and Anticipation

Preparation

Mindset

Active facilitation

Reflect, Act, Improve

ROGELBERG’S 5 TAKE-HOME POINTS FOR MEETING LEADERSHIP
FEELINGS AFTER GOOD MEETINGS

- Energized, positive energy is contagious!
- More creative
- Ready to get started
- Feeling work can stay on track
- Sense of purpose and accomplishment
- Learned something new
- Motivated
- Feeling great about your team and co-workers
- ‘Can do’ attitude
- Cooperative
- Strong team spirit
- Belief that collaboration works

1 Use and practice effective meeting strategies until they are habits

2 Be a good meeting steward whether leading or participating

3 Protect your time by sharing good meeting strategies with others

CHANGE YOUR RETURN ON INVESTMENT (ROI) FOR MEETINGS
The Surprising Science of Meetings, Steve Rogelberg’s website
  ▪ Good Meeting Facilitation: Checklist
  ▪ Run Better Meetings article
  ▪ Alternative Agenda Approach
  ▪ The Surprising Science Behind Successful Remote Meetings, MIT

How to Create the Perfect Meeting Agenda, Harvard Business Review


10 tips to run more effective meetings in 2020, The Enterprisers Project

9 ways to fix awful virtual meetings, The Enterpriser Project

How to run meetings that hurt less, The Enterpriser Project

What It Takes to Run a Great Virtual Meeting, Harvard Business Review

How to Run a More Effective Meeting, New York Times

4 Ways to Be More Effective in Meetings, New York Times

When You’ve Had One Meeting Too Many, New York Times

How to Create the Perfect Meeting Agenda, Harvard Business Review

Economic impact of bad meetings, TED

David Grady (6-min TED Talk: How to save the world (or at least yourself) from bad meetings)

Want a better decision? Plan a better meeting + 42 min podcast , McKinsey & Company

The Single Best Predictor of a Successful Meeting is….., The Goodman Center

Decision-focused meetings, Bain & Company

A VIDEO CONFERENCE CALL IN REAL LIFE

https://youtu.be/JMOOG7rWTPg