



# **OPTIMIZE MEETING EFFECTIVENESS: HOW TO GET RESULTS**

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# Presented By

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**YOU WIN, YOU WIN**



# **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

# WHAT WE WILL COVER TODAY



**"A motion has been made and seconded that this be one of those meetings where nothing actually gets done."**

# HAVE YOU EVER FELT LIKE THIS?

- 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.**





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# ELEMENTS OF A BAD MEETING

6

# 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



## *Savage Chickens*

by Doug Savage



# FEELINGS AFTER BAD MEETINGS

8



# 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

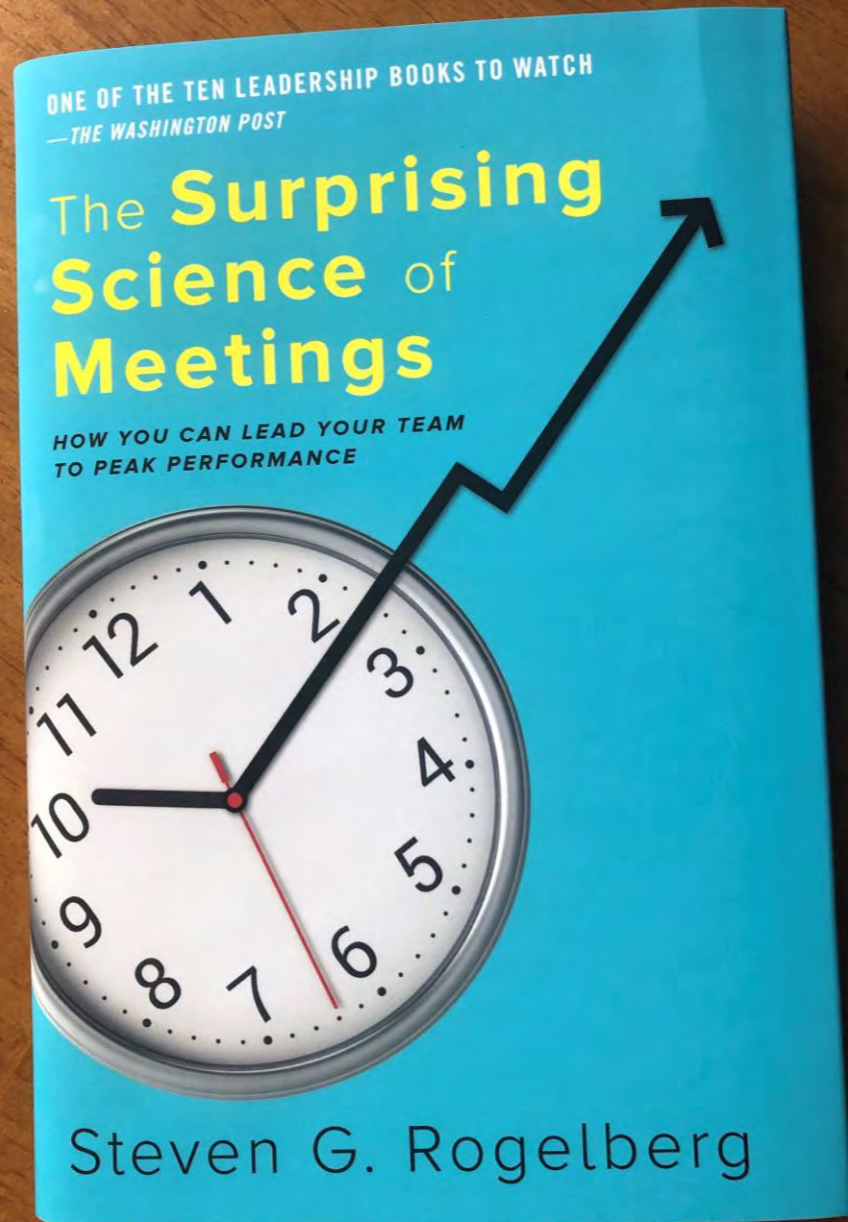




Economic  
impact of  
bad  
meetings,  
**TED**







# BUT A WORLD WITHOUT MEETINGS IS ALSO PROBLEMATIC

- 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



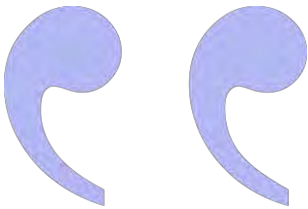
A Deep Dive into the Science of Effective Meetings




Mayfield  STEVEN ROGELBERG, AUTHOR, THE SURPRISING SCIENCE OF MEETINGS

ImageThink






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



Meetings  
that could  
have been  
emails

# DO YOU NEED A MEETING?

Ask yourself why you're having the meeting.

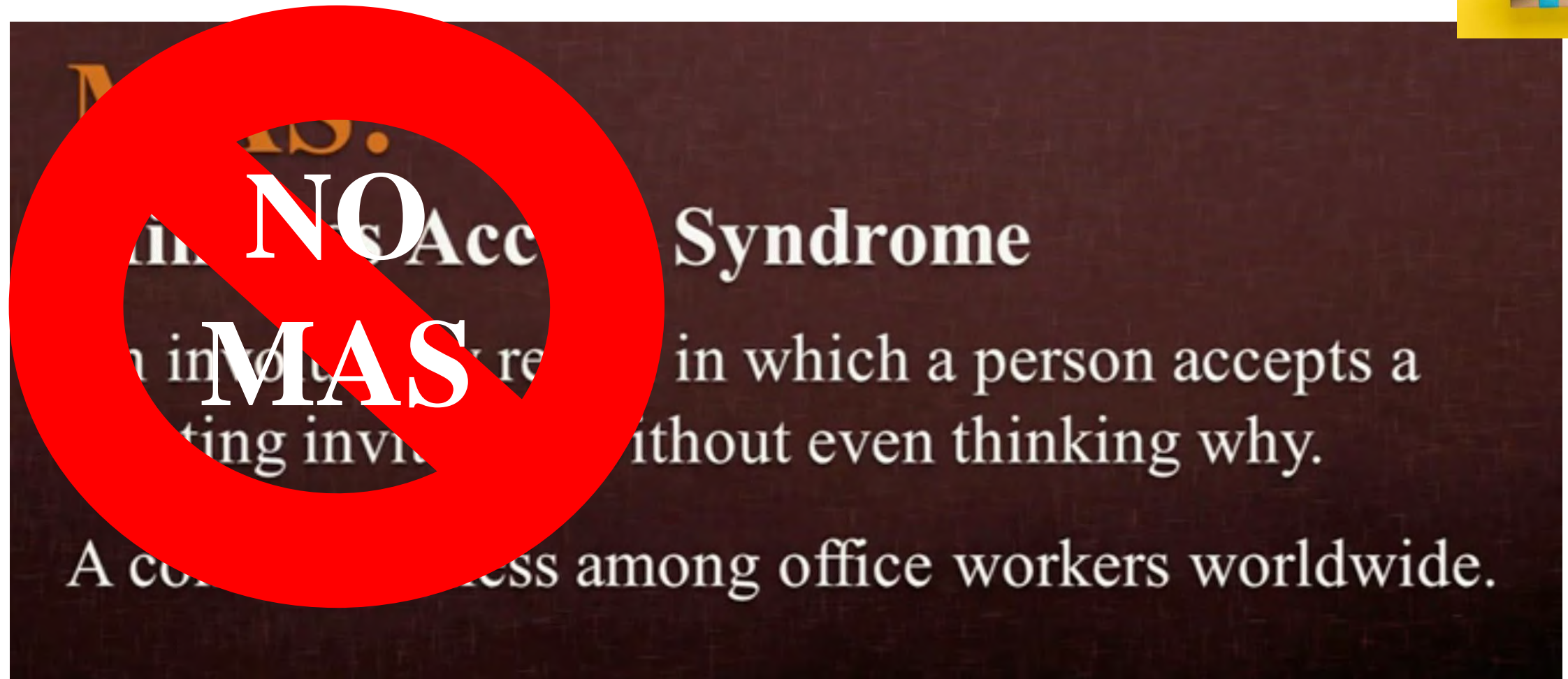
If you can't say what your meeting will accomplish, you shouldn't have it.

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?





How to Save the World (or at least yourself) from Bad Meetings, David Grady, TED Talks

# EFFECTIVE MEETING CHECKLIST

- ✓ 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



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“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: “**W**ho does **W**hat by **W**hen?”





### Budget Problems

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

### Customer Process Improvement

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

### Leader Succession

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

### Continuing Our Strategic Planning

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

### Miscellaneous Updates

- 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.

# **AVOIDING OVERCROWDED AGENDAS**

## ***The Art & Science of Agenda Prep***

From Dramatically Better Meetings, Goodman Center





LOGO HERE

## SAMPLE MEETING AGENDA

- Meeting Date & Time: 8:00-9:30 a.m.
- Location:
- Contact: Name, email, phone
- Participants:

Major goals or key objectives for the meeting Key decisions that must be made			
1.			
2.			
3.			
TIME	TOPIC	PRESENTER	WHAT'S NEEDED? I= Information D=Discussion A=Action
Time	Item 1: Key word or strategic question to be answered <i>*note any related materials for this topic (hyperlink or attach)</i>	Designate	I, D, A
Time	Item 2: Key word or strategic question to be answered <i>*note any related materials for this topic (hyperlink or attach)</i>	Designate	I, D, A
Time	Item 3: Key word or strategic question to be answered <i>*note any related materials for this topic (hyperlink or attach)</i>	Designate	I, D, A
9:20 ALWAYS RESERVE TIME AT END	WWW: Who does What by When? <ul style="list-style-type: none"><li>• Key Takeaways</li><li>• Actions and responsible individuals</li><li>• Notes or preview of next meeting (including topics to cover)</li></ul>	Designate	A
9:30am	Adjourn		

Participants

Objective

Time Box

Context + IDA

Preparation

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

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WWW.ANDERZTOONS.COM



"Listen, I'm no expert, but I still want you to listen to me ramble on about this for a while."

- **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**



# 10 Ground Rules for Meetings



## 1 Show up on time and come prepared

Be prompt in arriving to the meeting and in returning from breaks.  
Be prepared to contribute to achieving the meeting goals.  
Come to the meeting with a positive attitude.



## 2 Stay mentally and physically present

Be present, and don't attend to non-meeting business.  
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 100% by sharing ideas, asking questions, and contributing to discussions.  
Share your unique perspectives and experience, and speak honestly.  
If you state a problem or disagree with a proposal, try to offer a solution.

## 4 Let everyone participate

Share time 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 inputs, 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 idioms, three letter acronyms, and phrases that can be misunderstood.  
It's OK to disagree, respectfully and openly, and without being disagreeable.

## 7 Stay on point and on time

Respect the groups' time and keep comments brief and to the point.  
When a topic has been discussed fully, do not bring it back up.  
Do not waste everyone's time by repeating what others have said.



## 8 Attack the problem, not the person

Respectfully challenge the idea, not the person.  
Blame or judgment will get you further from a solution, not closer.  
Honest and constructive discussions are 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.  
Identify actions based on decisions made, and follow up actions assigned 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



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- **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**



# KNOW YOUR MEETING TYPES

## **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.

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

McKinsey  
& Company

Want a better decision? Plan a better meeting, McKinsey

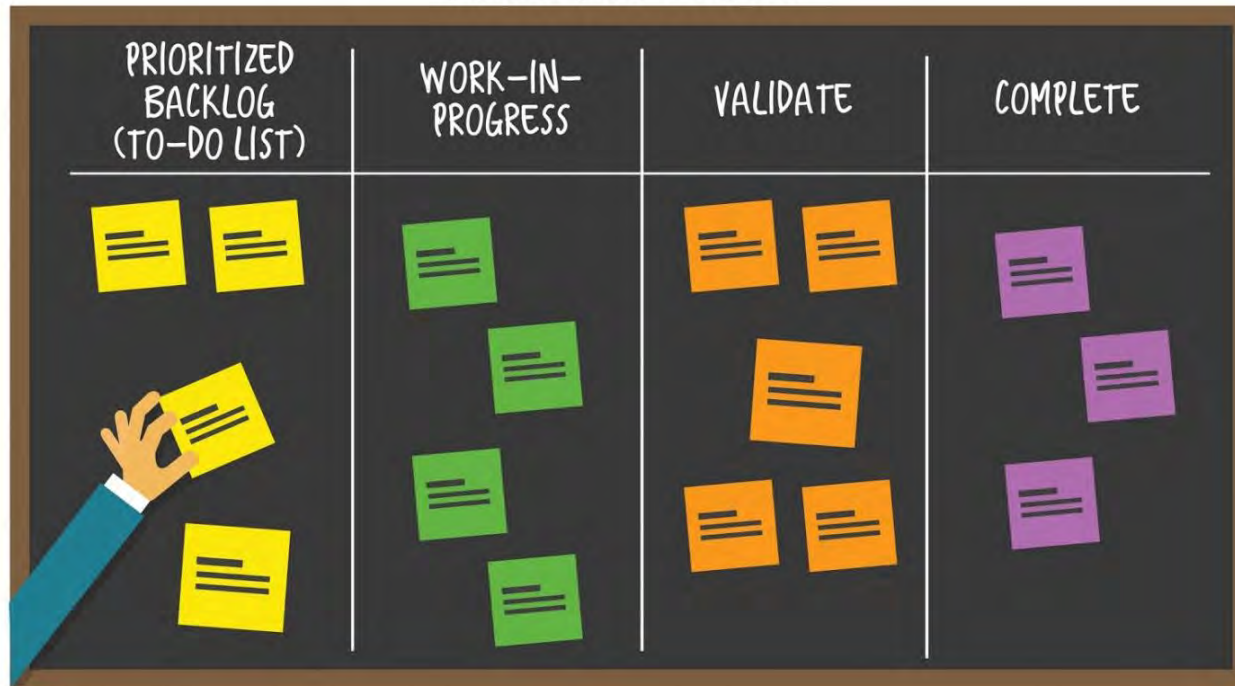


<b>Team Cadence</b> Weekly Team Meeting Daily Huddle Working Session 	<b>Progress Check</b> Project Status Update Portfolio Review Stakeholder Update 	<b>One-on-One</b> Manager One-on-One Coaching Session Mentoring Session “Catching Up” 	<b>Action Review</b> Retrospective Win/Loss Review Rehearsal 	<b>Governance Cadence</b> Board Meeting Quarterly Strategy Refresh Client QBR 
<b>Idea Generation</b> Solution Brainstorm Ad Campaign Ideas Requirements Brainstorm 	<b>Planning</b> Project Planning Product Development Planning Campaign Planning Event Planning 	<b>Workshops</b> Design Workshop Team Building Value Stream Mapping Kickoff Chartering 	<b>Problem Solving</b> Root-Cause Resolution Incident Response Plan Reset 	<b>Decision Making</b> Strategic Opportunity Decision Candidate Selection Final Approval 
<h2>The Taxonomy of Business Meetings</h2> <ul style="list-style-type: none"> <li> Congenial Meetings</li> <li> Formal Meetings</li> <li> Intense Meetings</li> </ul> 		<b>Sensemaking</b> Investigations Informational Interview Market Research User Testing Discovery 	<b>Introductions</b> Sales Call First Interview New Hire Introduction Investor Pitch 	<b>Issue Resolution</b> Support Escalation Contract Negotiation Dispute Resolution 
		<b>Community of Practice</b> Meetups Safety Committee Lunch-n-Learn 	<b>Training</b> Skills Certification New Hire Training Client Training 	<b>Broadcasts</b> All-Hands Meeting Webinars Press Briefing 



# STAFF MEETINGS

## KANBAN BOARD



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



from: THE SURPRISING  
SCIENCE OF MEETINGS  
by STEVEN G. ROGELBERG

# 5 elements of good meeting facilitation



## 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.



## active listening

- ❑ Keeps clarifying & 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 & takeaways are recorded and not lost. Confirms accuracy with attendees.



## conflict management

- ❑ Encourages conflict around ideas & then actively embraces & manages the conflict so that positive benefits for performance & 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.



## ensuring active participation

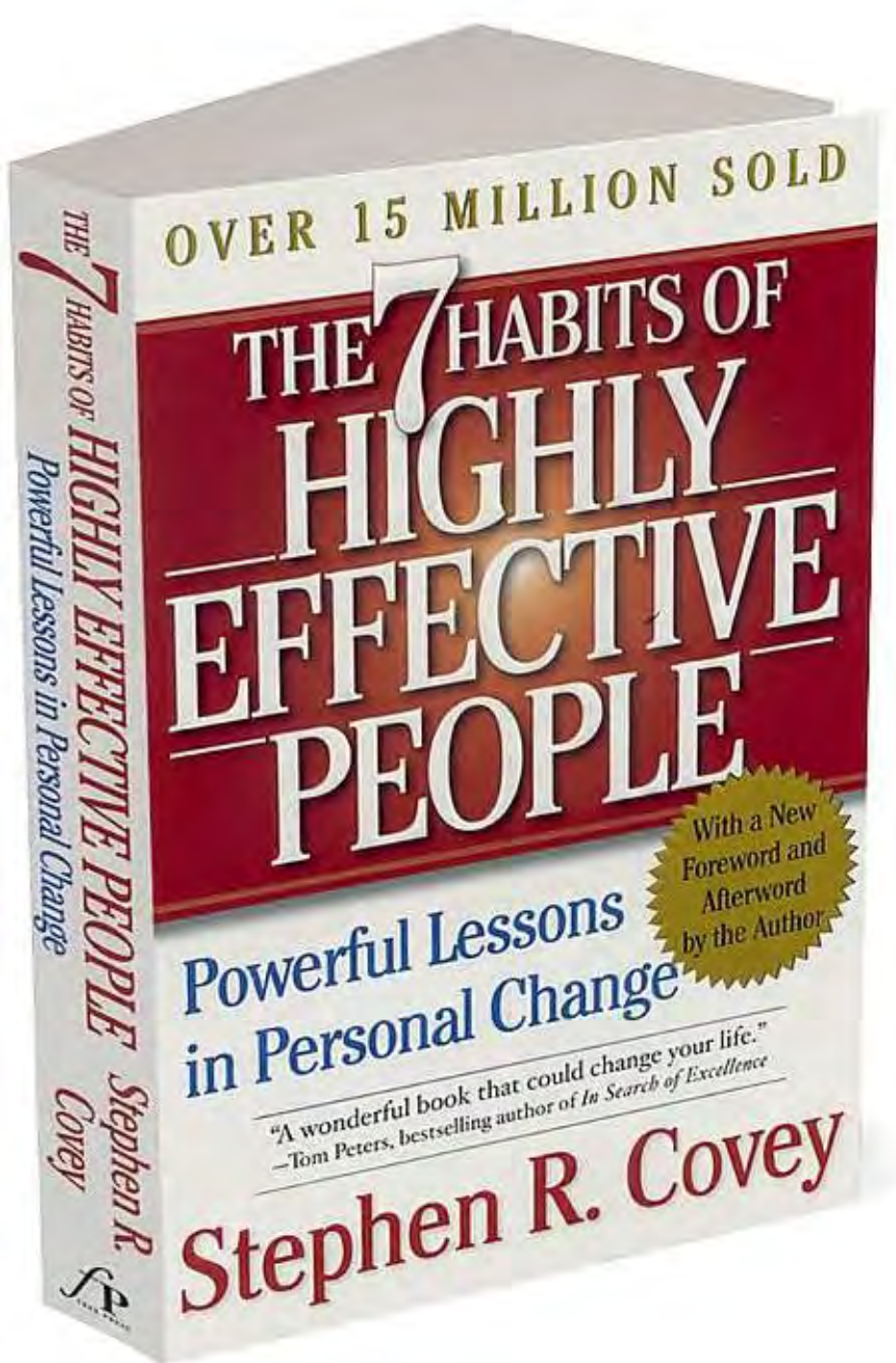
- ❑ Actively draws out input from others. Keeps mental track of who wants to speak and comes back to them.
- ❑ To keep an attendee from dominating the conversation, uses body language (e.g. subtle & small hand movement to stop) and transition statements (e.g. "thank you for that").
- ❑ Keeps side conversations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



## pushing for consensus

- ❑ Tests for agreement & consensus to get a sense of where attendees are at, but does not unduly & unnecessarily pressure others to reach a conclusion when not ready.
- ❑ Knows when to intervene assertively in the meeting process and provide direction and 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.





**“ Most people do not listen with the intent to understand. They listen with the intent to reply. ”**



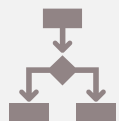
Provide input when appropriate



Actually listen



Come prepared (improved agendas help)



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

# EFFECTIVE PARTICIPATION IN MEETINGS



# 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?





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

# GOOD MEETING GOODIE BAG LINKS



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

How to Create the Perfect Meeting Agenda: A Step-by-Step Guide to Structuring Better Meetings, 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





**FOR  
FUN...**