A meeting, it has been said, is an excellent way to waste a lot of people’s time all at once. The larger and longer the meeting, the higher the stakes and the more important it becomes to make certain that the meeting efficiently and effectively accomplishes its objectives and that those objectives help to achieve the organization’s goals.

And yet, many do not. In many organizations, meetings are viewed not as “work” but as obstructing “work.” As someone once observed, “A meeting is an event at which the minutes are kept and the hours are lost.” Dave Barry said, “If you had to identify in one word the reason why the human race has not achieved and never will achieve its full potential, that word would be ‘meetings.’”

Meetings are often dreaded as a big, tedious time-sink to be evaded if possible and endured only if necessary. One bumper sticker proclaims, “When I die, I hope it’s at a meeting.”

But it doesn’t have to be that way!

The latest Partners in Improvement discussion focused on meetings and how to design and use them effectively to help move the organization forward toward its goals.

### Types of Meetings

We identified many different types of meetings that serve different functions in an organization — all of which have the potential to add great value or waste a lot of time:

- **Daily huddle:** A work team gets together for 10 minutes every morning to share information about the day’s plan, status of action items, and any issues or barriers that must be addressed. Generally, this is a stand-up meeting with the objective of keeping everyone aligned, focused on the work, and aware of any issues that need to be escalated. Participants are the members of the work team.

- **Monthly (or bi-weekly, or quarterly, etc.) Meeting:** These meetings happen on a set schedule, usually with a standing agenda. Commonly, the main purpose is to keep participants informed. Participants are usually selected because of their membership in a particular group, such as a department or a management team.

- **Ad hoc Meetings:** These are called to address a specific topic. Participants are chosen specifically because of their relevance to the topic. The agenda is tailored to the issue.

- **Project Team Meetings:** These are regularly scheduled meetings which may continue for many months until completion and “post mortem” of the project. Examples include: development of new products, implementation of new technology, or completion of a merger or acquisition. Participants are selected based on roles and responsibilities for the project. The agenda is
generally set and the objective is generally to ensure everyone is informed and the project stays on track.

□ **Problem-solving or Improvement Team Meetings:** These are short-duration, fast moving teams, aimed at studying a situation or opportunity, analyzing root causes, and identifying and testing ways to improve the situation. Participants are selected based on their relevance to the improvement.

Some of these meetings are conducted remotely, with meeting software and conference calling. Many others are in person.

However, all of these are INTENDED to accomplish an objective that cannot be accomplished without bringing people together, either virtually or in person. But do they fulfill that function? And if so, at what cost? That depends.

How much more can be accomplished by organizations that become truly skilled at making meetings matter?

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**Productivity Busters & How to Prevent Them**

The Partners were familiar with many productivity-busting aspects of meetings. These five factors are major contributors to the well-deserved reputation that meetings have developed in many organizations:

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**Latecomers**

A common time-waster occurs when a key person is late. Because the group knows they will have to revisit the topics once everyone is there, they often simply wait, leaving the more punctual participants plenty of time to ponder how they could be better using this time. The late-arrival phenomenon can become quite endemic, because people rightly determine that since the meeting will not start on time, they might as well finish what they are doing and arrive a few minutes late. Soon late starts become the norm.

The group identified some ways to address this at the root cause:

□ Several Partners recommended that organizations establish meeting norms to start at 10 minutes past the hour rather than on the hour to permit time between meetings for people to be ready to participate in the meeting. If all meeting lengths are multiples of 30 minutes, anyone whose responsibilities include consecutive meetings will likely be late simply due to transition time from one meeting location to another.

□ Once an organization adopts an unspoken norm that it is OK to be late, a new norm must be explicitly adopted and agreed to by the group, including how they will hold one another accountable for punctuality. Organizations have a variety of ways of holding themselves accountable for timeliness. Some examples include:
• Requiring a latecomer to do something harmless but embarrassing such as tell a joke or sing a song. This makes the point that the person did not meet the expectation, however one Partner pointed out that some people enjoy the spotlight, and the performance does take time away from the meeting and disrupts the discussion underway when the latecomer arrives.

• Some organizations require the late-comer to pay a fine to the team or to a charity, bring everyone coffee, or to buy cocktails for everyone after work.

• Another approach is to lock the door, effectively “shunning” the undesirable behavior. Unfortunately, this last method simply converts the participant from a “Latecomer” into a “No Show” which produces yet another type of waste.

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**No Shows**

A meeting can be crippled if one or more people who are essential to the effective accomplishment of the objective fail to show up. When this happens, the people at the meeting must decide whether to disband and reschedule, perhaps jeopardizing a timetable, or try to proceed as well as they can — impacting the quality of the discussion and decision making and quite often necessitating rework with the missing person at a later date.

No-shows, other than for emergencies, can be minimized with several techniques:

- Send a clear meeting objective and agenda so that all participants know the importance and also know what is expected of them.
- In addition, send a meeting update/reminder 48 hours before the meeting to make sure everyone is aware of the expectation.

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**Circular Meetings**

Some meetings go everywhere and nowhere — round and round but never arriving at a conclusion or a clear set of action items that “move the ball forward.” Sometimes a meeting is scheduled to address a problem or topic, but the leader and participants arrive with no data or no process with which to arrive at a decision. Consequently, they do not move forward.

Sometimes the meeting topic wanders off into “rat holes” or the meeting discussion is hijacked by someone with a different objective. To avoid the circular meeting, the leader needs to:

- Communicate a clear objective,
- Propose and gain agreement on the meeting process — who will bring what information, how they will evaluate it,
- Facilitate effectively to keep the meeting on topic, on process, and gain the appropriate input from all participants.
Undocumented Meetings

Some meetings are almost productive! Sometimes, the objective is clear, participation is prepared and effective, and conclusions and/or next steps seem clear and agreed upon at the meeting. Then the group disperses and a day or two or ten passes, and eventually it is clear that no one has the same recollection of what was agreed to. When the group reconvenes, the discussions and decisions of the previous meeting must be reworked. The Partners were unanimous regarding the importance of documenting decisions and action items in meeting minutes.

Unnecessary Meetings

The biggest waste of all is the unnecessary meeting. Sometimes organizations have meetings out of habit, without a clear purpose that adds value for the organization and participants. These meetings are most likely to leave people zoning out, checking their smart phones, and longing to be elsewhere doing something more meaningful. If a meeting does not have a clear and compelling objective that requires a meeting to accomplish, rethink whether to have the meeting at all. Evaluate other methods to distribute information, and reserve meetings for meaningful work that cannot be accomplished without the group of participants. One Partner said the secret to good participation is scare meetings — everyone knows that if he calls a meeting, it must be important.

Keys to Effective Meetings

If you call a meeting, you own it. You are responsible for ensuring that the meeting is well planned and managed to accomplish an objective that supports the organization’s objectives. The Partners identified key elements of effective meetings, creating a useful checklist for anyone leading or facilitating a meeting.

Meeting Objective has Clarity and Alignment

Before thinking about the management of the meeting, the leaders first must be clear about the meeting objective and how it aligns with the organization’s objective.

- What is the objective of this meeting? Can it be clearly stated? Will you be able to know if the objective has been met? How will you test this? If you cannot determine if the objective is met, how will you know if the meeting was successful?
- Does the meeting objective help the organization toward its key objectives? Does the meeting truly “move the ball forward”? Is it a compelling reason?
- Is a meeting the best approach to the objective? Is there any other effective and efficient method of accomplishing the objective?
Participants

- Have you identified who must participate in order to enable the meeting to accomplish the objectives? Who is required? Who is “optional”?
- Are “stand-ins” likely to be effective if a participant cannot make the meeting?
- How many or how few people can participate effectively to meet the meeting’s objective? If the objective is to deliberate and decide, too many participants can impede that process. If the objective is alignment, too few people may thwart that objective. Expecting participants to spread communication and alignment is often a tall order. The information is transformed as it passes through each node in the communication process.

Timing

Once you have identified who must participate, the options for scheduling become more constrained. You need to schedule the meeting when all required participants can be there and ready to contribute. However, a good meeting plan will consider these other things as well:

- How much time is needed for the meeting? Rather than schedule meetings only in increments of 30 minutes, allocate the amount that you think you really need to fit the objective. If you need 10 minutes, schedule a 10 minute meeting.
- Shorter meetings with a tight scope can be very efficient, but for some purposes longer, meetings can start, process, and complete a deliverable, if they are well thought-out, designed and managed.
- How much time will elapse between meeting decisions and the opportunity to act on them? The more time that elapses between when the action items are agreed to and an opportunity to complete them arises, the more likely they are to be misremembered or forgotten entirely. If possible, avoid meetings late on Friday or before a long weekend or a vacation.
- For many people, meetings first thing Monday morning are difficult to focus on, while for others that’s a perfect time — when they are rested and ready to dive into the work week.

Of course, it is not always possible to consider all these factors and find a meeting time that works. Consider your audience and your objective to ensure you identify the most productive meeting time possible.

Place

An effective meeting requires an appropriate location. Choice of place helps you set the tone for the meeting. If the room is too big, people may feel isolated and not fully participate. Sometimes you do not even want a room — for a small group a walking meeting, or an outdoor
location can better suit certain topics or objectives. However, outdoor meetings could leave people straining to hear and be less engaged. Conference rooms where everyone can see everyone else tend to foster the best discussions. Long narrow tables tend to reduce participation. Here is a checklist to consider:

- Is the room the right size? Are there enough chairs?
- Is it conveniently located?
- Do you have the technology you need?
- Are the acoustics adequate?
- Will some people need to call in? If so, how can you ensure that they are able to actively participate? For virtual meetings, the following tips were identified:
  - If participants do not know one another, plan time for introductions,
  - People often find it helpful to have a photograph of participants,
  - Facilitation of a virtual meeting requires some specialized techniques. (See Meeting Management — Virtual Meetings)

**Meeting Preparation**

Publish an objective and agenda in advance. The agenda should indicate how much time should be allocated to each agenda item, so that it is clear if the meeting is on track or bogged down.

If you expect someone to read something, don’t hand it out as they come into the meeting. Send it in advance and be explicit about your expectations for pre-work. Is everyone expected to read it in advance, or is it a “nice to have”? Are people expected to bring copies or will you provide copies at the meeting? If any of this is unclear, waste will result.

**Meeting Management**

Effective meetings are managed with the following factors in mind:

- Ground rules: When an entire organization has agreed upon meeting ground rules, meetings can operate much more efficiently. If the organization does not share common ground rules regarding meetings, they can be decided upon by participants. It is a good idea to remind everyone of the ground rules at the start of each meeting.
- Because the required amount of time, and no more, was allocated for the meeting, the meeting must start on time.
- Many meetings have the leader own all the roles: facilitator, scribe, timekeeper. Often that is too much for one person. When possible, divide up these responsibilities and rotate the roles for standing meetings.
- Use appropriate props whenever possible.
  - Give people time to organize their thoughts, ideas, and objections by brainstorming onto Post-It Notes™. Then go Round-Robin to capture all the ideas.
Use nominal group technique to quickly arrive at decisions while taking everyone’s views into account.

Break into small groups when appropriate.

Use affinity diagramming.

Choose open and closed questions, depending on whether you want to expand discussion or bring it to closure.

- Keep the objective and the time constraints involved.
- Manage the discussion to gain the necessary participation and table discussion that is off topic. Two tools are very helpful in keeping meetings focused:
  - Parking lot: Important topics may come up that are off-topic for this meeting. A “parking lot” enables the meeting leader to capture the point without derailing this meeting’s agenda.
  - Visual scribing of decisions and action items: Notes that are visual to the entire group help ensure that everyone is hearing the discussion, decisions, and action item the same way. Ask, “Do I have it captured correctly here?” to verify agreement. If there is disagreement with the way it is captured, it can be resolved right then and there.

A process check is when the leader or facilitator explicitly asks for feedback on the progress of the meeting. Process checks during the meeting can help you find out if the group is with you or if they think the meeting is moving off target. A process check at the end of the meeting helps everyone understand and improve the meeting process.

**Meeting Management — Virtual Meetings**

All of the requirements for in-person apply to virtual meetings, however there are some additional things to keep in mind. When everyone is present in the room, you have the opportunity to take constant “process checks.” You can see from the body language if people are engaged or not. In a virtual meeting, you cannot see whether or not someone has decided to stop attending to the meeting, or is obviously frustrated or annoyed with the meeting. In addition, people often find it hard to determine when it is OK to chime in. To help manage these drawbacks if a virtual meeting, it is very helpful to:

- Keep a record of who has contributed to the discussion, so you will know if someone has been too quiet and draw them in.
- Call on people in the virtual meeting rather than just waiting for people to chime in. However, if you want to avoid embarrassing anyone, say their name first and then ask your question.

**Meeting Followup**

After a meeting, send out a follow-up note of what you think was accomplished and/or agreed to and any open action items — who should do what and by when. Use a Meeting Note format.
for an efficient and effective way to document a meeting. (For a copy of Conway Management’s Meeting Follow-up Form, please contact mj.king@conwaymgmt.com). And send the notes out as soon after the meeting as possible, when people are best able to act on them.