

The Meeting Template

Meetings are a fact of life in every organization. Meetings represent important opportunities to plan strategy, share information, build strong teams and solve problems. Unfortunately meetings are too often an enormous drain of both time and energy. This is especially true for senior managers who commonly attend one meeting after another.

How Meetings Undermine Efficiency

Anyone who attends a lot of meetings knows the common pitfalls that occur in too many of them. These include a lack of adequate preparation, a poorly detailed agenda, the absence of key people, poor time management, the tendency of going off track, lack of true closure and failure to create sufficiently detailed action plans. In too many meetings people are asked for their ideas, only to discover later that the decision was actually being made elsewhere. Added to these problems are common dysfunctions like people who dominate, lack of real listening, people talking over each other and emotional arguing. Recently, technology has been undermining meeting effectiveness as people work on laptops and handheld devices throughout important discussions.

The Traits of All Truly Effective Meetings

Meetings that work all share the following traits:

- There is a detailed agenda, preferably sent out ahead of time so that participants can prepare.
- The people attending have agreed to abide by a core set of group *Norms* or meeting guidelines.
- There's a clear framework for each topic. This includes the name of the agenda item, the expected outcome or purpose of the discussion, a short description of the process to be used and the timeframe for each topic.
- There is a clear indication of who needs to take part in each agenda item. This allows people to leave meetings when they're not needed.
- Whenever possible information sharing and updates are posted on the intranet so that valuable meeting time can be dedicated to planning, problem solving and relationship building discussions.
- For all decision-making discussions the empowerment level is clearly stated, as is the specific approach to be used to make decisions.
- There is always a facilitator, especially for any decision-making conversations. Members take part sharing the roles of gatekeeper and timekeeper to keep things on track.
- All decision-making conversations are structured using process tools. The process tool or approach to be used is described at the start of each discussion.

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- Feedback about meeting quality is sought on a bi-monthly basis using a simple *Pluses and Deltas* format. On an annual basis a more detailed meeting effectiveness survey is conducted for each group that meets on a regular basis. This survey is followed-up with a meeting to interpret the data and look for improvement strategies.

The Meeting Template

To encourage the development of an effective meeting culture, a standard meeting template is being created for use in all parts of the organization. The *Meeting Template* is a set of standard practices aimed at not only improving the quality of all meetings, but also of reducing the number of total meeting hours.

The *Template* provides standard operating practices and mechanism that enable teams to custom design key elements to accommodate their needs and make continuous improvements.

The Objectives of the Meeting Template

This template has been created in order to:

- Continuously improve the overall effectiveness of all meetings.
- Reduce the total number of hours staff spend in meetings.
- Implement a consistent approach to meetings across the organization.
- Improve the quality of group decision-making and meeting outcomes.

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Meeting Template Components

The *Meeting Template* features a number of key components. These are each described in greater detail later in this document. These components are:

1. A set of guidelines that all meeting participants agree to abide by. The template offers a starter set of guidelines for ratification by teams, plus the option to add any rules that teams feel will further improve their meetings.
2. An agenda framework that includes a description of the topic, the expected outcome, the process to be used, the empowerment level, the time frame, the name of the responsible parties and the agreed to next steps.
3. Guidelines for conducting decision-making discussions and selecting the appropriate tool for each decision.
4. A mechanism for keeping all meetings both on time and on track. This includes the standardization of a “*Parking Lot*” in each meeting and the creation of a rotating gatekeeper role. The template also includes the role of timekeeper.
5. Periodic exit surveys to gather suggestions for improving meetings, to be conducted bi-monthly. These pulse-taking activities enable teams to generate ideas to further improve their meetings.
6. A once-annual meeting survey conducted online that allows each team to assess such things as the quality of group participation, the effectiveness of group decision-making, the use of time, etc. and make further improvements to their meeting routines.

The *Meeting Template* may appear at first glance to be a standardization effort. Over time, however, the emphasis on periodic feedback will empower teams to take hold of their meetings and refine them to suit their specific needs.

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1. Meeting Guidelines

In order to ensure effectiveness all meetings should be guided by a core set of *Behavioral Norms*. Norms are rules that all members of the group agree to follow. Below is a starter set of Norms that have been shown to improve meeting management. These can be accepted in whole or modified. Groups are encouraged to add rules whenever the need arises.

- *We will listen actively and not interrupt when others are speaking.*
- *We will each ensure that we don't personally dominate any meeting by monitoring our own participation.*
- *We will speak openly and honestly during meetings, then keep all confidential information private.*
- *When we encounter differing points of view, we will debate the facts of the situation without personal enmity.*
- *Any personal feedback to a colleague must be constructive.*
- *We will each honor meeting start and end times.*
- *We will each make an effort to stay on track and on time within the agenda time limits.*
- *We will each avoid actions that disrupt the meeting like side-chatting or walking in and out.*
- *Anyone can call a time out if they need a break.*
- *We will all avoid non-essential texting and emailing during meetings.*
- *We will put away laptops and cell phones anytime a colleague indicates that an agenda item requires everyone's full attention.*
- *We will each contribute our ideas and resources to the team and also share the responsibility for the work of the team.*
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2. Agenda Framework

To be completed by the meeting facilitator in advance to ensure that there is clarity about the purpose of each item on the agenda.

Agenda item title:

Purpose/Expected outcome(s) for this topic:

Type of conversation: Information sharing Problem solving
 Planning Relationship/Team building

Empowerment: the group is being given information
 the group is being consulted to get their input
 the group is making a decision that needs mngmt approval
 the group is making a decision and has final say

Process/Tools to be used for this agenda item:

Timeframe for this agenda item:

Person accountable: _____ cell: _____ email: _____

Key participants:

Homework/Prep required by participants:

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3. Decision-Making Guidelines

Types of Conversations:

All group conversations fall into one of four categories:

- Information sharing – giving updates, briefing colleagues, teaching.
- Planning – visioning, strategy building, action planning.
- Problem solving – analyzing a problem, brainstorming then sorting ideas.
- Relationship building – sharing personal data, exchanging information, creating team guidelines.

At the start of each agenda item, the person responsible for that item should indicate to the group the conversation type. The person responsible should then describe the approach or tool to be used.

Empowerment Levels:

Decisions can be made at four levels:

- i. Telling – the decision has been made elsewhere and the group is merely being informed.
- ii. Consulting – the decision will be made elsewhere but the team is being asked for their advice.
- iii. Participating – the team is being asked to decide and propose actions but their ideas must gain approval before they can act.
- iv. Delegating – the team is being asked to decide a course of action and can take action without further approvals.

At the start of every discussion, the topic leader indicates clearly the empowerment level of the topic if it is of a decision-making nature.

Decision Methods:

Decisions can be made using a variety of tools. If the decision is important, the method selected should be one that unites rather than divides. At the start of any decision-making conversation, the topic leader should describe how the final decision will be made:

- Building a consensus through joint analysis and brainstorming.
- Making lists and then using multi-voting to prioritize options.
- Appointing an expert to make a final decision that is binding on the team.
- Building a compromise option to bridge the gap between two positions.
- Using majority voting to decide between competing options.

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4. Meeting Roles

Meetings work best when there are clear roles. The following three roles will help make any meeting better. Consider rotating the gatekeeper and timekeeper roles to build shared responsibility into every team!

Facilitator: The facilitator clarifies the purpose, process and time. They ensure that the discussion is managed in a structured manner. They manage participation and make interventions to restore effective behavior. Facilitators also make notes of flipchart paper or white boards so that the outcome of the discussion is a true group effort. Finally, facilitators help groups to arrive at decisions and create action steps.

Gatekeeper: This is a specific role in which one team member volunteers to monitor the conversation in case it goes off track. This person is empowered to say things like: *"I see that we're on a topic that isn't on our agenda. Do you want to continue this or should this item be parked for a future meeting?"* The gatekeeper is also in charge of the *"Parking Lot"* page posted on the wall. They record all off topic items there and then remind the group about the parked items at the end of the meeting.

Timekeeper: Every team should purchase a timer and appoint a timekeeper for each meeting. The group should then agree that the timekeeper is not to be considered rude if they interject things like: *"I'm noticing that we're now past the time allotted for this item. I'm concerned we're not going to get to the rest of the agenda. What do you want to do about this?"*

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5. Bi-Monthly Feedback

Teams that meet on a regular basis should schedule time to conduct a *Pluses and Deltas* process at the end of one meeting every two months. Here are the very simple steps in this activity.

- At the start of the meeting the facilitator posts a sheet of paper with two columns: one for pluses and one for deltas.
- Sticky note pads in two colors are provided to that group members can record what they like about the meeting on one color and suggestions to improve the things they think are ineffective on another color.
- As members leave the session they simply post their sticky notes on the Pluses and Deltas chart.
- One team member volunteers to take the chart to their desk to read and sort the notes to eliminate duplicates.
- The chart is brought back at the start of the next meeting so that members can discuss and ratify any of the improvement suggestions in the deltas column.

Deltas will result in either action steps or new norms. The new *Norms* can be added to the existing list of team guidelines.

6. Annual Meeting Survey

Once a year teams should conduct a detailed meeting survey. This survey can be quickly completed and tallied online. Once the results are known, the team needs to dedicate one hour to review the findings. This is a three-part conversation:

1. What got high ratings? In what ways are our meetings already effective?
2. What can we do to improve the low rated aspects of our meetings?

Once potential improvement ideas have been generated, these can be sorted using a multi-vote and action plans can be developed. Both the meeting survey and the survey-feedback process are located on the pages that follow.

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Meeting Effectiveness Survey

Rate the meetings held by your team based on the following indicators. All ratings are anonymous and will be feedback to team members in tabulated form.

Agenda: Are agendas clear and detailed enough to provide a good framework?

1 _____ 2 _____ 3 _____ 4 _____ 5 _____
Poor Fair Satisfactory Good Excellent

Preparation: How well do people do their homework and come prepared?

1 _____ 2 _____ 3 _____ 4 _____ 5 _____
Poor Fair Satisfactory Good Excellent

Active Listening: How good are we at listening attentively to each other?

1 _____ 2 _____ 3 _____ 4 _____ 5 _____
Poor Fair Satisfactory Good Excellent

Participation: Rate the extent to which everyone gets heard at meetings?

1 _____ 2 _____ 3 _____ 4 _____ 5 _____
Poor Fair Satisfactory Good Excellent

Differing Views: How good are we at objectively debating the facts of a situation rather than getting caught up in emotional arguing?

1 _____ 2 _____ 3 _____ 4 _____ 5 _____
Poor Fair Satisfactory Good Excellent

Process: How good are we at structuring decision-making conversations?

1 _____ 2 _____ 3 _____ 4 _____ 5 _____
Poor Fair Satisfactory Good Excellent

Focus: How good are we about staying on topic and not wandering?

1 _____ 2 _____ 3 _____ 4 _____ 5 _____
Poor Fair Satisfactory Good Excellent

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Meeting Times: How good are we at starting and ending on time?

1 _____ 2 _____ 3 _____ 4 _____ 5 _____
Poor Fair Satisfactory Good Excellent

Time Management: How good are we at staying within the time limits as set out in the agenda?

1 _____ 2 _____ 3 _____ 4 _____ 5 _____
Poor Fair Satisfactory Good Excellent

Productivity: How effective are we at getting things done and leaving meetings with concrete action steps?

1 _____ 2 _____ 3 _____ 4 _____ 5 _____
Poor Fair Satisfactory Good Excellent

Attention: How good are we at turning off laptops and handhelds during important discussions?

1 _____ 2 _____ 3 _____ 4 _____ 5 _____
Poor Fair Satisfactory Good Excellent

Quality of Decision Making: Rate the extent to which we make high quality decisions as a team.

1 _____ 2 _____ 3 _____ 4 _____ 5 _____
Poor Fair Satisfactory Good Excellent

Amount of Time Spent in Meetings: Rate the appropriateness of the total number of hours this team spends in meetings on a monthly basis.

1 _____ 2 _____ 3 _____ 4 _____ 5 _____
Poor Fair Satisfactory Good Excellent

Your Overall Rating of our Meetings:

1 _____ 2 _____ 3 _____ 4 _____ 5 _____
Poor Fair Satisfactory Good Excellent

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Survey Feedback Process

Once team members have received the results of their Team Effectiveness Survey, the team will schedule about 45 minutes review the tabulated data and identify improvement strategies for all items that received low ratings.

Note that improvement ideas will fall into two categories: they will either be new rules to be added to the team's meeting guidelines or they will be action steps that need to be implemented. For some of the more personal items such as active listening and coming on time, the solution is often best framed as "*Commitments each of us is willing to make going forward.*"

Process Steps:

1. On a flipchart list all the elements that received high ratings (Good or Excellent). Discuss why these items received high ratings. (10 min)
2. List all the items that received low ratings (Poor, Fair and Satisfactory). (5 min)
3. Ask each person to pick a partner. Give partners time to talk about strategies to improve future meetings. (10 min)
4. Gather up all the improvement ideas. List all new norms or meeting guidelines first. Then gather up all the action steps. Identify what the implementation would look like for the action items. (15)
5. Review and ratify acceptance or all new rules and guidelines with each team member. Send a summary of the notes to all team members. (5 min)

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Meeting Role Cards

Ask teammates to help you facilitate. Print out these role cards and hand them out to two willing volunteers at the start of your meetings.

Gatekeeper – Be on the lookout for signs that the meeting has gone off track. If the group has strayed onto a topic, point this out. Then help members decide if they want to stay on this new topic or park it. Say things like:

“I’m noticing that we’re on a topic that isn’t on our agenda. Do we want to keep going or should we park this item?”

Timekeeper – Keep track of time. Use your wrist watch or a stopwatch and call out periodic warnings such as:

- *“We’re at the halfway point.”*
- *“We have five minutes to go.”*
- *“Looks like it’s time to wrap up.”*