Making the Most of Meetings: Meetings By Design

by Kelly S. Petrock

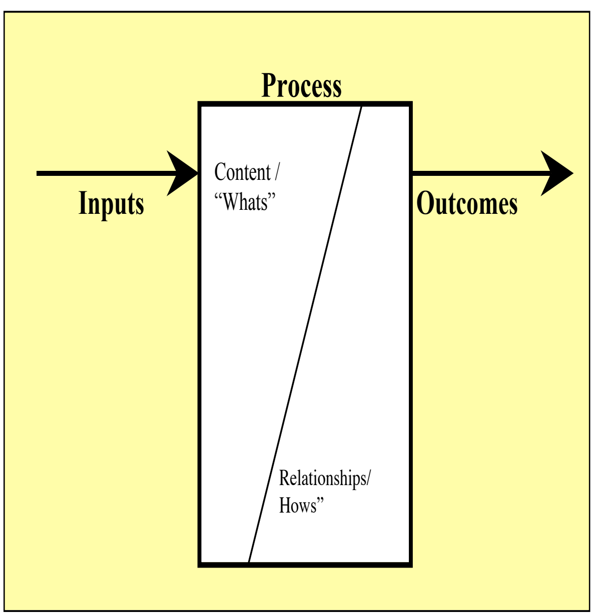
This article "Making the Most of Meetings: Meetings By Design" is the first of two part series on meeting effectiveness. Content, concepts and capabilities addressed in these articles can be transferred to clients via workshops, training and tele-classes.

*H*ow much time do you spend in meetings? Four hours a week, ten, twenty? The amount of meeting time is increasing and more and more meeting attendees are frustrated by the lack of effectiveness in the time spent in meetings. At a recent LEAD session one participant described the state of meetings at their organizations as a "meeting orgy".

The truth of the matter is that many organizations are betting heavily on the promise of synergy, the promise of bringing people together to raise, address and solve issues. By default, organizations are betting heavily on meetings.

Despite the increasingly critical role that meetings play in today's "real-time" organizations, meetings and the people that attend them are suffering—needlessly.

Figure 1.



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In addition to providing training in running effective meetings, the nature of our business requires us to design complex meetings, seminars and workshops. This article is focused on helping you to improve an existing meeting(s) and make it more effective. The steps that I will outline can also be used to plan for a new or "one-off" meeting.

An easy way to recreate and reclaim your meetings is by deliberately designing the meeting that you need. This can be achieved by treating each meeting as a process that must be designed to achieve specific outcomes/outputs. To do this, we use the

Input, Process, Outcome (IPO) tool depicted in Figure 1. Applying this tool to improve meetings requires the following steps:

1. Redefine the outcomes for the meeting.
2. Select and match the general tone for the meeting process to the new outcomes above.
3. Identify the constraints that will likely impact the meeting.
4. Redesign the meeting process to achieve outcomes and accommodate constraints.
5. Define, build and assemble the inputs to the meeting to "feed" the process and achieve the desired outcomes.
6. Facilitate and run the new meeting.

1. Redefine the outcomes for the meeting.

In designing new meetings, or redesigning existing meetings, we always start at the end— outcomes. Below are some sample outcomes that meetings can and should legitimately be designed to satisfy:

- To communicate information, to share data, information and concepts.
- To instruct, train or educate
- To gain commitment and/or support
- To reinforce or strengthen teamwork and collaboration
- To gain compliance, to enforce protocol or procedure
- To solicit ideas, consult or get advice
- To plan and coordinate activities around decisions that have already been made
- To identify problem areas and concerns
- To solve problems
- To make decisions

When revisiting, redefining and prioritizing the meeting outcomes, what you will walk out with, is the most critical step. Be sure to include others in defining these outcomes (meeting participants and stakeholders to get their perspective on what outcomes are important to them.) Defining and prioritizing outcomes helps to inform the process and as well as the inputs of your meeting. Defining and prioritizing outcomes will also help you stay on track during your meeting. And, if the military axiom "No plans survives first engagement" or Murphy's Law take over, you're more likely to have the confidence and judgment to adapt your process "in the moment", staying focused and ending up with your outcomes satisfied.

2. Select the tone for the meeting process.

Once your meeting outcomes are defined, it is good practice to do a high level evaluation of the process requirements for that meeting. This should help define and describe the basic "tone" or style that you would like to have your meeting adhere to. At this point you are asking and answering the question; ¿Based on the required outcomes, what general tone should govern my meeting process? There are four basic tones that meeting the process can follow. You will want to identify the tone, which best matches and is most congruent with your meeting outcomes. Making this selection at this time will help you to later evaluate constraints, process and inputs. The four meeting process tones are:

- Collaborative: Meetings with this tone tend to be participative, engaging, leadership is shared, clarifying and dealing with relationships is important, members learn from and instruct each other, conflicts are tolerated and embraced. This meeting process tone is a great match when your outcomes consist of items such as: commitment, ownership, team building, personal development, appreciation of and action across interdependencies.
- Conclusive: Meetings with this tone tend to be terse, task /action focused, quick, getting at and dealing with priorities, accountabilities are important and members take direction from task owners. This meeting process tone is a great match when your outcomes consist of items such as: making decisions,

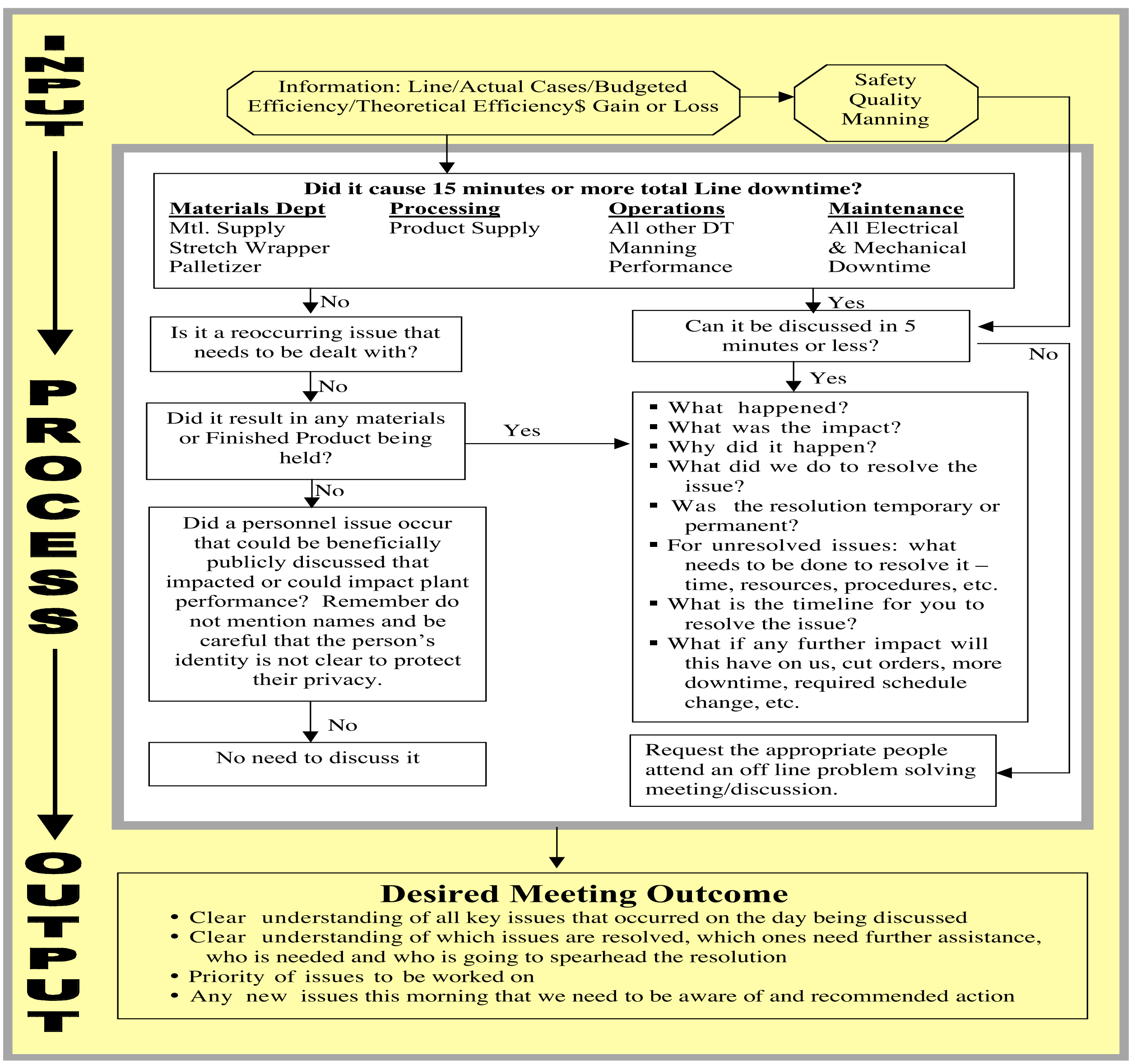
accountability, corrective actions, taking action and creating a sense of urgency.

• Controlled: Meetings with this tone tend to be deliberate, fact focused, getting at and dealing with root causes, resolving problems is important and members take direction from experts, etc. This meeting process tone is a great match when your outcomes consist of items such as: solving problems, developing plans, coordinating activities and setting / enforcing procedures.

• Exploratory: Meetings with this tone tend to be free flowing, opportunity focused, possibility oriented rather than decision oriented, creative, risk tolerant, are real-time and fast paced. This meeting process tone is a great match when your outcomes consist of items such as: surfacing and exploring issues, defining opportunities, stakeholder management and exploring creative or novel solutions to reoccurring issues.

Selecting the tone of your meeting process is not brain surgery so don't get stuck here. Simply determine which mode of operations best "fits". If you cannot settle on two meeting process tones, a primary and subordinate one, then you may need to accept the fact that you are actually dealing with two meetings and not one. If this is the case the outcomes from one meeting should be the inputs into the second one.

Figure 2



A final consideration and no simple task, is to redefine the purpose of the meeting. A clear single sentence purpose statement articulates the reason why this meeting exists. Your purpose statement will anchor your meeting end point and clearly communicate what the meeting is all about. The purpose statement should be the first thing people read when reviewing the agenda.

At this point you should be clear on the meeting outcomes and have some general guidelines regarding the optimal tone of your meeting process and have redefined the purpose of the meeting.

3. Identify the constraints.

The next set of considerations that you need to address in recreating and reclaiming your meeting is the issue of constraints. In the IPO approach to meeting effectiveness, constraints are represented by the box, or parameters that the meeting must operate within. The most common constraints are time, meeting space/room layout and meeting technology. Meeting constraints are often misjudged or not considered. For example, a long narrow room would definitely be a real constraint if you determined earlier that your outcomes required a "collaborative" meeting process tone. This same room would actually work for you, not against you had you determined that your outcome required a conclusive meeting process tone.

Pre-work, data packs and issuing agendas in advance are some simple ways of accommodating constraints by manipulating inputs. Many meetings fail because they were doomed from the beginning by unconsidered constraints. Again, determining the constraints that will impact your meeting will inform your meeting's process and inputs.

Expect conflicts between your prioritized outcomes and the constraints that will impact your meeting. The tension between the desired outcomes and constraints is good. This tension forces us to think creatively about the most effective and elegant process for the meeting.

4. Redesign the meeting process.

At this point in the redesign process you should have: crystal clear outcomes, a defined general meeting tone, purpose and a clear understanding of constraints. Now you need to get specific about how to redesign your meeting process to achieve those outcomes and accommodate your constraints. The meeting process basically consists of how you organize the meeting content, the "whats" and actually conducting the meeting, the "hows". Your choice of how to conduct the meeting should take into account the current nature of relationships between participants and any steps that you may need to take to influence these relationships during the meeting. With all the work you have already done, thinking differently about the meeting process should be fairly intuitive. A new agenda is now in order and should reflect the new "whats" and "hows" of your meeting process.

The next article: "Making the Most of Meetings: Effectively Facilitating Your Meeting Process" will be dedicated specifically to conducting your new, improved meeting.

5. Redefine the inputs to the meeting.

Would you run your car (process) without oil (input)? Hopefully not. This is true of meetings as well. To keep your newly redesigned meeting process running smoothly, that new process will require new inputs. Some typical changes to inputs that may result from the redesign of a meeting include:

- New agenda, often sent out in advance
- Meeting notes and actions from the previous meeting
- New information data-packs and or reports.
- New participants
- New meeting equipment and or technology

- New meeting roles defined to facilitate the meeting process
- New meeting room layout

Changing the participants of a meeting can dramatically improve the productivity and overall sense of satisfaction with a meeting. When meeting participants don't know why they are there, don't know why others are there or are only engaged in portions of the meeting, they question the meeting's focus. In this uncertain situation some participants react by hanging back and waiting even though they may have important contributions to make. On the other hand, another portion of the participants will fill the void and make contributions that may tend to be off track and tangential to the agenda. These behaviors may be symptoms of a poor meeting design.

Think carefully of participants as inputs and how their relationships to each other affects the overall meeting process and outcomes.

If the meeting inputs are not adequately satisfied going into the meeting, you will have to make adjustments to the process. This is particularly true of inputs such as data and participant preparedness. Don't be afraid to postpone the meeting if these critical inputs are not satisfied. This action sends a clear message that the meeting is important and cannot be expected to achieve the outcomes if the inputs are not there. This judicious application of tough love can help break the cycle of unproductive meeting protocol.

6. Facilitate the new more effective meeting

Effectively facilitating meetings is a skill that can be learned. In the next article, I'll address specific behaviors, processes, tools and intervention methods that you can use to conduct your perfect meeting, perfectly.

Summary

Meetings are essential to today's "real-time" organizations. Often time, productive and unproductive meeting behavior and outcomes are built in by design. Regrettably, many meetings are haphazard affairs, with little forethought, that consume large portions of the workday but do not achieve their intended outcomes. Consequently, many people in the workplace have developed an aversion to meetings, regarding them as a waste of time, an attitude that often becomes self-fulfilling. A well designed meeting is a synergistic process that will bring key people together to raise, address and solve many problems.

By implementing the IPO meeting redesign process, however, organizations can build success in from the beginning. Better designed meetings make more productive use of the time spent in meetings, and many find that their people have become more enthusiastic attendees and contributors.

Examples

- Figure 2. is a product from an actual meeting redesign for a shift start-up meeting within a production facility. This client opted to depict its meeting process as a series of structured decision flows. Like we always do, the client started to redesign their meeting. The meeting itself, when conducted, flows from top to bottom.

What is interesting about this product is that the tone of the meeting process is decidedly "conclusive" and "controlled". The meeting was a pre-production meeting, attended by direct and indirect labor participants. It was imperative for this client, like all matters within the facility, to be as efficient as possible. Therefore, all "collaborative" and "exploratory" discussions were purposefully designed out of the meeting. These discussions were designed to occur as a result or outcome of the meeting, off-line, between concerned and interested parties.

This new meeting design helped bring standardization to the pre-production meeting. Up until the redesign, all meetings took too long, assertive members got their issues heard and other important issues went not discussed. Paradoxically, the new standardized meeting process helped this client meet its needs for a highly flexible workforce. Now supervisors, managers and hourly people could actively participate in any pre-production meeting regardless of shift or product line.

- During a culture change effort within a nuclear power client, redesigning meetings emerged as a critical point of leverage for its successful culture change effort. Specific features of the culture change required shift-managers and supervisors to exercise more initiative and to solve more problems at their level instead of escalating issues ("bring us solutions, not just problems"). Every day senior leaders and shift-managers met to achieve the outcomes of reviewing schedules, reviewing activities, reprioritizing tasks and resolving tactical problems. The client then added increased initiative, increased coordination between shift managers, decrease in "escalations" and increased problem solving at the point of execution to the outcomes of this standing meeting. Figure 3. is a representation of the clients' initial IPO driven meeting redesign.

These new added outcomes helped the senior leaders to realize that in part, their presence in the meeting was actually a constraint to their desired outcomes. Their presence and their conduct kept the shift-managers "stuck" in the old behaviors. Insight gained through IPO meeting redesign helped this client to then redesign and restructure the meeting into two parts.

The first and longest portion of the meeting was now to be held just with the shift-managers without the senior leaders being present. To do this, the meeting process needed to be much clearer and more structured. Their product was similar to the product in Figure 2. if not a little less prescriptive.

The second and shorter portion of the meeting permitted the shift managers to present their discussion highlights; actions, schedule issues, problems, resolutions and next steps to the senior leaders. This outbrief format was clearly defined as mini-outcomes for the first portion of the meeting.

This new meeting design forced the organization to carefully consider the new information input requirements that the shift-managers would need to conduct their meeting autonomously. As an added benefit to redesigning this meeting, senior managers came to realize that the lack of initiative and point of execution problem solving that was embedded in their culture was actually a function of having poorly informed shift-managers. Up until this time senior leaders were still holding onto the belief that their shift managers lacked the capability and desire to take initiative and solve problems at their level.

The new meeting format took less time, freed the senior leaders to deal with strategic issues, and improved the working knowledge and overall satisfaction of shift-managers. Improving your meetings can have a similar impact on the business and add to both the bottom and top line.

Figure 3