

# Training 101

## GUIDELINES FOR GROUPS

Many organizations are encouraging employee participation in order to increase the brainpower they can focus on important problems. Instead of having one or two people at the top make decisions alone, groups of employees are wrestling with problems and recommending solutions. The expectation is that many heads will come up with a better solution than one or two people working alone.

Besides, if people help solve the problems that affect their jobs, then the chances of creating lasting change are greater, because the people who will have to implement a decision had some input into it.

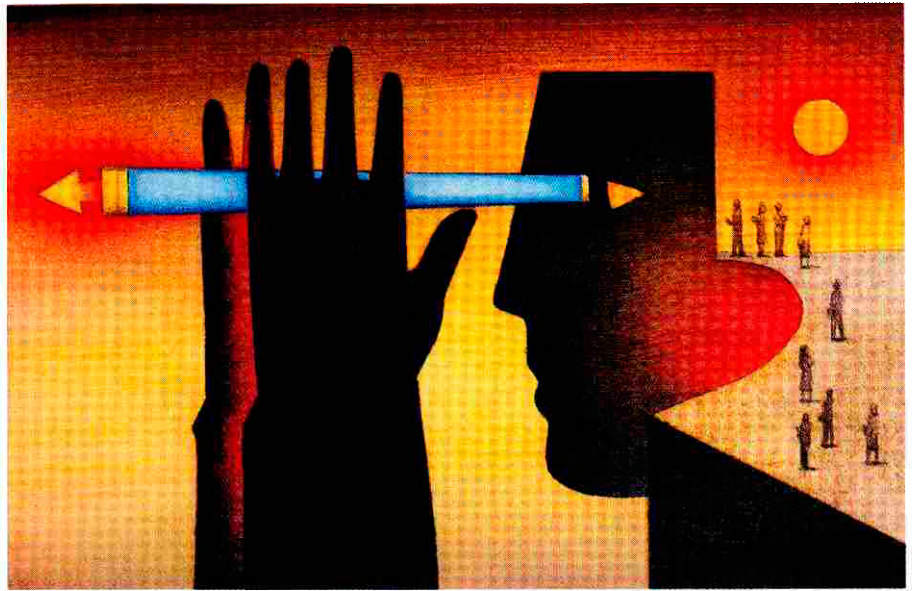
That may sound good, but all too often it doesn't work. One reason can be poor meeting management. Simple meeting practices have to be done correctly and consistently: Set agendas. Manage the discussion. Compile and distribute the minutes. See Jana Kemp's article, "From Meeting Breakers to Meeting Makers," on page 16, for some useful meeting-management tips.

But even a group that follows simple meeting-management practices may not function effectively in the long run. Well-run meetings are crucial, but they don't guarantee success.

To make groups truly effective, organizations must address several important issues up front—before the groups jump into the work they have been charged with. Bob Stump's article, "Ten Questions for Groups," looks at 10 critical issues that must be resolved if groups are to be successful.

### Ten Questions for Groups

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Project teams, quality teams, and employee-involvement teams usually start with great promise and hope. In a typical scenario, someone says, "Let's get a group together to work on that." So somebody calls the first meeting, and the group is off and running.

The first meeting allows people to get to know each other and to learn about their task. But the discussion wanders. By the time they leave the session, some people are not sure of just what they are supposed to accomplish.

How often have you come out of such a meeting and asked, "What went on there?" "Why were we in there?" "How much time did we waste?" "Does anyone really know why this group meets?" or "What is this group supposed to be doing?"

The second meeting might go a bit better, but things are still not

*Here are 10 questions to ask when getting a group off the ground, and some tips for making meetings more manageable.*

quite clear. As the group continues to meet, several things may happen:

- ▶ The group may continue to revisit decisions and cover the same ground several times.
- ▶ The group may lose focus and go into topics that some group members think are irrelevant.
- ▶ The group may be unclear about who will carry out its recommendations or whether it has the authority to take action.
- ▶ Some members may question whether all the people who need to be in the group are part of it.

After a while, enthusiasm fades, members send "substitutes" or just don't show up, and the process falls apart.

A major reason for this all-too-frequent set of events is that the group did not get off to a clear start.

When a group is assigned a task, several topics have to be made clear—to the group, to those authorizing its work, and to others in the organization. In many cases, nobody ever asks the right questions or answers them adequately. The group speculates, wonders, and doesn't get around to its task. When a group and its task haven't been completely thought through, people are left feeling let down. Time is wasted; energy is diffused. The result seldom meets the high hopes that the group began with.

Here are 10 questions that should be answered before a group meets for the first time—or during the first meeting. When the answers are clear to everyone, a group can save hours of wasted time and eliminate a lot of frustration. Groups that don't answer the questions are likely to become ineffective and unable to live up to expectations.

**The task.** What is this group being asked to accomplish?

Every member of a group will want to know why the group exists. The "let's have a meeting about that" syndrome does not create clear understanding about a group's goals. Before the group starts up, the person bringing these people together should clearly and succinctly state the group's purpose in writing.

Some examples of group purposes:

- ▶ to recommend actions that will

### Ten Questions for Effective Groups

Your organization has brought together a group of people and assigned them a task. Improve the odds of success by asking the following 10 questions about the group, before it begins its work.

- ▶ What is this group being asked to accomplish?
- ▶ When is this group expected to finish its task?
- ▶ What has already been decided about the topic (for example, goals and budgets), and how do those items affect the group's potential recommendations?
- ▶ Who will decide whether this group's recommendation is adopted or whether its ideas will be carried out?

- ▶ What criteria are being used to select group members or leaders, and who are the initial members?

- ▶ What other individuals or groups should know about this group's existence and purpose?

- ▶ With whom is this group expected to communicate while it is doing its task? How often and by what means?

- ▶ What resources does the group have to help it accomplish its task? What is the source of this group's organizational authority to use these resources?

- ▶ How will group members be paid?

- ▶ To whom should this group turn for clarification as it goes about its work?

cut rework in the finishing department

- ▶ to recommend actions that will reduce customer-service complaints by 25 percent

- ▶ to implement a fix for last week's shipping-room breakdown.

It is vital at this point to be sure that the group knows whether it is to decide an issue, to recommend a course, or to take action.

**Timing.** When is this group expected to finish its task?

Deadlines are important! They set the context for a group's work. They affect many factors, such as how often the group meets and what resources it will need. The group will be more effective if it knows at the start when its job has to end.

**Prior constraints.** What has already been decided about the topic (such as goals or budgets)? How do those factors affect the group's potential recommendations?

How often have we seen the following sequence of events?

"Group," the boss says, "I want you to figure out how to fix this situation. Go to it—and bring me back your best ideas."

"OK, boss."

The group members go off together and develop some dynamite recommendations. When they've finished, they make their presentation to the boss.

The boss responds: "That's a great

\$50,000 idea, but we have only \$10,000 in the budget." Or, "That's fine, but this is not the time to consider reorganization. Corporate told us five months ago that we couldn't do that."

The group set off on its path, with no inkling that boundaries constrained the directions it could pursue. People's time and energy has been wasted. Their enthusiasm has been killed.

The boss could have prevented it all by telling them ahead of time about the budget limitations or the corporate directives that limited the scope of acceptable recommendations.

**Authority.** Who will decide whether this group's recommendation is adopted or its ideas are carried out?

Few groups of frontline employees have the authority to make major changes or improvements. Instead, they recommend changes to those who do have authority, or they give input to the people who will decide.

Before a group meets for the first time, someone should identify the people who will decide who carries out the ideas that are suggested.

The group will then know to whom it "reports." This will help it focus its efforts, because group members will know the audience they must speak to.

**Group selection.** What criteria are being used to select group members

or leaders? Who are the initial members? Why me? Why us? Why them?

Membership criteria are always the subject of speculation and are sometimes the subject of dispute. Members are likely to spend extra time working with this group—in addition to other job responsibilities. They will wonder why they were chosen.

When the people gather for the first time, they will look around the room and wonder why they and others are there. What is it about this collection of individuals that makes them the ones who should deal with the issue before them? People who were not chosen to join the group may wonder, as well—particularly if membership carries prestige.

Without clarity about why group members were chosen, the organization risks having people waste time in speculation. If the organization doesn't provide answers, people will make some up. To reduce wasteful speculation, the person forming the group should make the selection criteria explicit. Others may not agree with the matching of people with criteria, but at least the intentions will be clear.

**We're here!** What other individuals or groups should know about this group's existence and purpose?

This step makes sure that the right people know about the group and about the issue or topic assigned to it. This will prevent surprises, add legitimacy, and begin to build support for the group's recommendations. This step becomes more and more important as people up the hierarchy need to know how a particular issue is being addressed.

**Communication.** With whom is this group expected to communicate while it is doing its task? How often and by what means will that communication take place?

Once others in the organization know about a group's existence, they may feel curiosity, anticipation, or anxiety about what the group will produce.

Communication during a group's deliberations and data collection can be the key to implementing the group's ultimate recommendations. Set some communication guidelines at the start. And be open to changes

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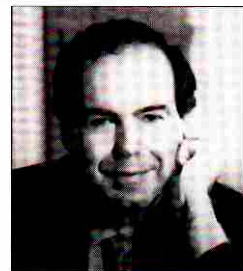
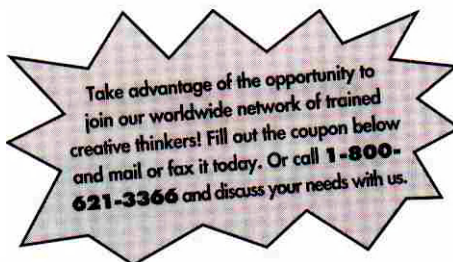
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as the project progresses.

**Resources.** What resources does this group have to help it accomplish its task? What is the source of this group's organizational authority to use those resources?

Groups may need a variety of resources for their work: Possibilities include conference rooms, meals, consultants, clerical help with minutes or data collection, and money to travel to other installations.

A group may also need account numbers, signatures, and other administrative tools to enable it to get the work done.

Make clear ahead of time what the resource requirements are and how the group should go about obtaining and using the resources.

**Compensation.** How will the group members be paid?

Depending on the kinds of employees that are in the group (for instance, salaried, exempt, nonexempt, or hourly), this may or may not be an issue. At any rate, people have a right to know what, if anything, they will be

paid for the time they spend working with the group. As the group does its work, new developments may require adjustments to the original arrangements. But an initial deal should be in place.

**Help!** To whom should the group turn for clarification as it goes about its work?

No matter how good a job people do in thinking through these questions and setting up a group, further questions will inevitably arise. For example, the group might feel the need to revisit the scope of its work or to ask for new resources.

The group has to know from the start where to turn for answers to questions that arise during its work. Two likely candidates are the person who formed the group and the one who will make a decision on its recommendations.

**Ten simple questions.** Answer those questions before a group gets started. You'll save time, focus energy, and make work groups more efficient.

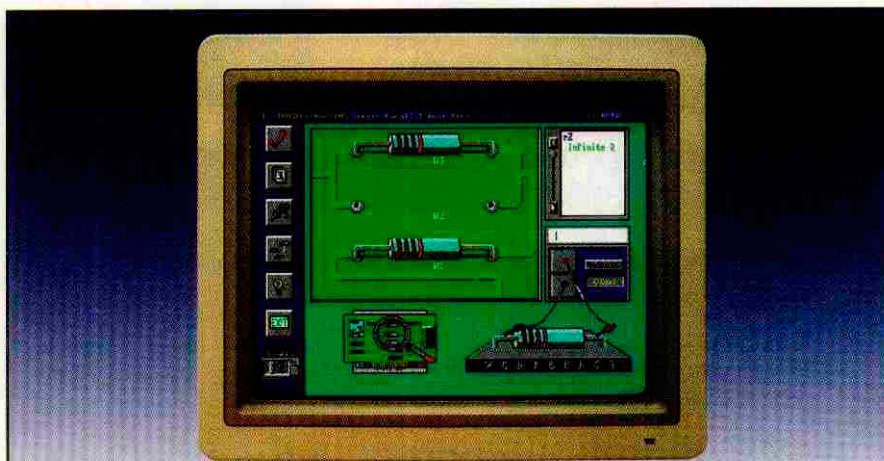
## From Meeting Breakers to Meeting Makers

*By Jana M. Kemp, Meeting & Management Essentials, Box 8045, Boise, ID 83707; 800/701-9447. Adapted from Moving Meetings. Copyright 1994, Irwin Professional Publishing.*

**C**an't live with them. Can't live without them. Meetings. If you work in an office, you probably spend some of your time scheduling them, leading them, attending them, or complaining about them.

Team meetings. Department meetings. Planning meetings. When they work, everyone is exhilarated. When they don't work, hours—even days—are lost to low morale and productivity.

**Meeting breakers** are everywhere—even the best meetings sometimes are attacked. Meeting breakers are anything or anyone who keeps the meeting from happening or from accomplishing its stated purpose. Meeting breakers assail everyone's energy, productivity, and morale—



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and can harm the company's competitiveness and profit. See the box for a list of the most common meeting breakers.

**Meeting makers**, on the other hand, ensure that people leave meetings exhilarated. What exactly is a meeting maker? It's an action, a statement, or a person who ensures that the meeting accomplishes its purpose and meets its goals.

Everyone can be a meeting maker—and with practice, a meeting master. With more meeting makers in your workplace, meeting attendees will be more energized; the entire organization may become more competitive and profitable.

### Meeting Breakers

The following common problems can derail meetings, leading to wasted time, low morale, and damage to an organization's bottom line:

- ▶ the lack of an agenda
- ▶ policies that call for regularly occurring meetings, even when there is nothing to discuss
- ▶ meeting planners who ask so many people to attend a meeting that most other work stops
- ▶ people who miss meetings, never see minutes from them, and then come to subsequent meetings unprepared
- ▶ one person who always controls the conversation in meetings so that no one else can get a word in
- ▶ missed starting and stopping times
- ▶ planners who schedule too much information or activity for each meeting—so that nothing gets accomplished
- ▶ lack of accountability, leading to confusion after a meeting over who is to accomplish what and by when
- ▶ a crisis-management mentality, characterized by everyone dropping everything to huddle in a conference room, unprepared to solve the problem
- ▶ conflict—spoken or unspoken
- ▶ a lack of participant power—sometimes you have it, and sometimes you don't.

Be a meeting maker. Armed with the following strategies, you can help eliminate the big bad breakers and the subtle stalls that keep meetings from meeting their potential.

How to be a meeting maker:

- ▶ Request that an agenda be sent out before the meeting begins, or agree on an agenda at the start of the meeting.
- ▶ Be tactfully bold and suggest canceling an unnecessary or badly planned meeting. Convene it when there is a need and an agenda.
- ▶ Include in a meeting only the people who will contribute to or significantly benefit from the stated agenda items. And don't include every person for every part of the agenda. Each attendee should come only to the meeting segments for which his or her presence is absolutely vital for reaching the department's and the company's goals.
- ▶ Volunteer to be a record keeper for the meeting, or appoint someone else to be. Record and, later, distribute minutes of the meeting's key points and decisions.
- ▶ Appoint or agree on a meeting facilitator, whose responsibility is to keep participants on track and encourage contributions from everyone.
- ▶ Volunteer or appoint a timekeeper. This person will advise the group when time for addressing each issue—and for the meeting itself—is nearly over, and will alert everyone when time has run out.
- ▶ Ask for help at the beginning of the meeting. Ask for clarification on the priorities for the meeting. Is the meeting being held to allow people to present information? To share it? To solve a problem? To make a decision so action can be taken? If participants can't or won't set priorities, cancel the meeting until a specific plan exists. Or ask the meeting leader to identify the meeting's purpose, and then continue with the meeting.
- ▶ Ask for help before the meeting closes. Ask, "What do I need to accomplish before our next meeting?" Others are likely to follow your lead. If that doesn't work, ask yourself whether you should attend the next meeting.
- ▶ Begin the meeting by clearly stat-

### Resources on Meeting Management

Need more information? Try the following *T&D* articles:

- ▶ "Ground Rules for Groups," by Roger M. Schwarz. August 1994.
- ▶ "Holding Your Own in Meetings, but Working as a Team," by Dianna Booher. August 1994.
- ▶ "Meeting Mania." ("Training 101") with brief articles by Doug Malouf, A. Edward Franklin, and Charlotte L. Stuart. October 1992.

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ing the problem to be solved and defining the meeting's goal. Ask what additional information is needed before continuing with the meeting.

- ▶ Work to pinpoint facts and separate them from emotional issues. Tactfully verbalize them for the group to arrive at consensus about how to move forward.
- ▶ Come prepared to listen and contribute.
- ▶ Ask questions when the meeting doesn't seem to be on track.
- ▶ Know the roles people can play to ensure a productive meeting; roles include facilitator, timekeeper, record keeper, and participant.
- ▶ Summarize how far the meeting has brought you, what it has accomplished, and what still needs to be accomplished.
- ▶ Ask "How can I help?"

**Making masters.** You can't achieve mastery in any skill without practicing. That also holds true for becoming a master meeting maker. With practice, you can break the meeting breakers, and make meetings that result in higher productivity, morale, and profit.

"Training 101" is edited by **Catherine M. Petri**. Send your short articles for consideration to "Training 101," Training & Development, 1640 King Street, Box 1443, Alexandria, VA 22313-2043.