the manager's COMMUNICATION Toolbox

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CHAPTER 15

MANAGE YOUR MEETINGS

"A meeting is an interaction where the unwilling,
selected from the uninformed, led by the unsuitable,
to discuss the unnecessary, are required to write
a report on the unimportant."

—T.A. Kayser

In This Chapter

- Why should we have meetings?
- Preparation for meetings is key.
- Best practices for planning, chairing, and participating.
- Make your meetings better.
- How to run remote meetings.

When thinking of meetings in the workplace, most people don't have great memories. Most of us are too familiar with tedious, unfocused, time-wasting, energy-sapping gatherings. We wade through monotonous minutiae, dealing with issues on which most attendees make no meaningful contribution. Useless and annoying meetings lead to countless jokes and cartoons.

Meetings also have positive features. The primary alternative to meetings—getting information on paper or in digital form—has limitations. As mentioned in chapter 7, people are influenced far more by a speaker's appearance and the sound of her voice than by the actual words spoken. No matter how advanced our high-tech communication becomes, there will always be times when live, interpersonal dynamics and nonverbal nuances of human communication justify physical gatherings.

Meetings are a good tool, but one that frequently isn't used very well. Many leave us feeling like they were a total waste of time, but sometimes we leave feeling energized, with a sense that we really accomplished something. There are reasons for these mixed experiences, but it's very worthwhile for managers to be positive about meetings. You should embrace meetings for the opportunities they bring.

For New Managers

In many cases, meetings give upwardly mobile men and women their most visible opportunities to demonstrate proficiency in intellect, business acumen, language fluency, leadership ability, and social skills. Meetings bring chances for new managers to interact with people at several levels; participating effectively has obvious career-enhancing implications.

Having observed some of the good and bad about meetings, we might wonder, what's the worst case scenario? That would be when lack of preparation and poor meeting management are combined with apathetic and inept participation by attendees. Managers can avoid such ugly outcomes by effectively planning, chairing, and facilitating; attendees can do their part by actively participating. This chapter will broaden our look at meetings, from those regular staff get-togethers, to the more formal variety, where attendees might include people from outside and inside an organization. There are some differences between informal staff gatherings and more prescribed meetings, in both planning and in conducting them. But there are many similarities, and the keys to running and participating in them efficiently are much the same. These key steps are detailed, with additional tips and three checklists to make the process user-friendly. We'll focus on the type of meetings most of you will encounter: The number of attendees is large enough for group dynamics, but small enough to allow reaching consensus and decisions.

Is a Meeting Necessary?

When you add up the cost of everyone's time—not just the minutes getting and sitting there, but interrupting other work, plus travel costs, meeting-room and support expenses—meetings become an expensive proposition.

If the goal is to share information, the same purpose might be accomplished via an email message with attachments, or through posting the information at a common access website with notification to everyone concerned. Even if feedback on the new information is desired, similar "meetingless" approaches can be used. You can request comments in email responses or via postings in an organization's electronic message board. In an increasingly busy work environment, such methods are replacing traditional meetings more often. Some organizations conduct virtually all of their business—including voting on issues—electronically, without a single, in-person meeting ever taking place.

Decide whether what you need to accomplish requires the effort and expense of a meeting. If your purpose goes beyond simple distribution and single-layered response, a meeting may be needed. Decide if you have any of the following requirements:

- Sharing information in a way that allows dynamic interaction.
- Developing ideas and solutions that require the combined knowledge and skills of more than one individual.
- Motivating staff, and publicly acknowledging achievements.
- Negotiating differences among conflicting ideas and forging consensus.

Once you've determined that one or more of these requirements exist, are you ready to round up the usual suspects, and just head into the conference room? Not exactly. Launching into a meeting without adequate prep work is a recipe for unfocused, chaotic interaction with an unpredictable outcome.

Case History: Impromptu Meeting to Solve Problems

Scenario: *An evolving situation at the Tru-Glow Energy Company forces the boss to call an impromptu meeting. Information he needs to understand and resolve the problem is fragmented among three groups:*

- *Some customers have come to complain that Tru-Glow is not meeting expectations to provide clean-energy heating and cooling.*
- *The Tru-Glow sales team is calling these customers unreasonable and is also reporting that the company's engineers are not responsive.*
- *Tru-Glow production engineers are calling the sales team idiots and the customers overly pampered.*

Inviting the customers and division chiefs into the conference room, the boss makes cursory introductions. The customers are a grocer specializing in organic fruits and vegetables (Wholesome Vegemart), and the owner of an organic nursery (Everbloom Greenhouse), who sells plants and floral arrangements "produced in a sustainable environment."

Paraphrasing a bit in an attempt to calm down the volatile tone, the boss summarizes the customers' complaints. While both had contracted for Tru-Glow's innovative heating and cooling systems because of their commitment to clean, nonpolluting energy, they've been "a bit dissatisfied at times because of uneven temperature levels and questions about air quality."

At this point, the manager of Wholesome Vegemart interrupts to say, "Uneven temperature is an understatement; some days your ridiculously expensive system can't get within 10 degrees of a comfortable level—too cold in winter, too hot in summer—"

Tru-Glow's sales manager cuts him off: "Look, you know your system depends on wind turbines and solar power. On cloudy days with no wind, those primary generators aren't working. That's what makes Tru-Glow's energy system so unique; our auxiliary system is the only noncarbon-based backup technology in existence. You just hit that auxiliary power button a few times, and the temperature will gradually even out."

That's when the owner of Everbloom Greenhouse loses it: "Gradually doesn't work for us," she says. "We can't have our customers freezing in winter and soaked with sweat in summer. I push that auxiliary power button again and again, but it takes a long time for the temperature to come around. And that's when the air quality tanks. My greenhouse fills up with indoor smog, with visible, black airborne particles."

The perplexed look on the sales chief's face suggests he's never heard of this phenomenon, and he does his best to sound surprised: "That's strange; sounds like a system calibration problem. The engineers should be able to work that out with a few adjustments—"

That's as far as he gets, what with the engineering chief on his feet, waving his hands and saying, "No, no, no! We've said, repeatedly, that the auxiliary can only be triggered once every hour. You sales guys know the backup is a subsoil heat extractor. Pushing that auxiliary button repeatedly will cause excessive air injection into the soil, stirring dirt into the airflow. That indoor smog is a plain old cloud of dirt in the air."

Things degenerate into everyone yelling at once, as the boss considers saying that the meeting is getting off track. But he realizes that with no announced purpose or agenda, it never really had a track. There's no doubt, however, the meeting is out of control—not advancing toward a resolution and increasing, rather than easing, animosities among participants. The meeting dissolves as the customers storm out, leaving the sales and engineering teams arguing with each other.

Would better management during the Tru-Glow meeting have made a difference? For example, would the outcome have been different if the boss had been more persuasive in articulating the company's commitment to customer service? Or might he have smoothed things over with a more temperate restatement of the engineer's disturbing comments? Perhaps this would have helped a bit, but not a great deal would have changed. By the time this meeting started, it was too late.

Build a Solid Foundation

A good paint job can only be achieved if the base preparation work is done well; rough spots must be sanded smooth and primer applied evenly. No matter how good the quality of the paint, no matter how skilled the person spraying the color coats—bad prep job equals bad finish. A meeting is like a paint job; to achieve a decent end result, the prep work has to be done well.

For any meeting, prep work begins with determining and clearly spelling out the purpose. Next comes the selection of agenda items, which anticipate outcomes that will accomplish the meeting's stated purpose. If such prep work had taken place at Tru-Glow, the purpose might have been stated in this way: "To hear concerns about Tru-Glow heating and cooling systems, ascertain reasons for problems, determine whether system information or technical adjustments are needed, and ultimately assure customer satisfaction."

In the course of working up that statement of the meeting's purpose, some preliminary inquiries of the customer would have helped the company recognize the essence of the problem. In developing the agenda items, it's reasonable to expect that the company would be fully prepared to describe the limitations of such environmentally sensitive equipment, and able to explore solutions, such as turning on the auxiliary unit earlier, but triggering it less frequently. This type of advance work clearly would have led to a meeting with a more acceptable outcome for both customers and the company.

For any meeting, once the purpose and agenda items have been determined, it's time to decide who should attend. This, too, should be carefully planned. Some might think the more the merrier, but that's problematic for several reasons. First, it ignores the matter of expense; every person in the meeting who cannot contribute to the process represents a direct waste of resources. Second, experience shows that decision-making ability at meetings is inversely proportional to the number of attendees—the more people at a meeting, the less chance there is to reach agreement and take action. For most meetings, it's advisable to restrict invitations to those who can contribute to accomplishing the meeting's purpose.

With preliminary decisions made, schedules can be checked, and a date, time, and place for the meeting can be set. These steps seem pretty straightforward, but professional planners often use some special techniques to help them set up successful meetings.

EXPERT TIP

As president of the Healthcare Leadership Council, Mary Grealy arranges exceptionally high-level meetings. Her organization is a coalition of chief executives from several disciplines in American healthcare, including academic health centers, hospitals, health plans, medical-device manufacturers, and pharmaceutical companies. With such an elite membership, HLC meetings need to be models of efficiency. Grealy provides these tips for avoiding pitfalls, making sure your meeting has the right agenda, and getting off to a running start:

- **Start with a firm idea of the meeting's purpose.** But keep the agenda in draft form until you consult with key participants on specific agenda items and desired outcomes.
- **Seek advice on who has special insight about the issues.** During pre-meeting calls to define agenda items, ask those persons "in the know" to be discussion leaders. When the meeting actually begins, you'll have good confidence that the agenda is germane and a head start on the work of the meeting, because key members already are tuned in.
- **Use best practice checklists.** This makes sure you don't overlook important details. We use one for planning a meeting (Figure 15.1) and one for chairing a meeting (Figure 15.2).

Best Practices for Planning, Chairing, and Participating

Such sophisticated advance work is not practical for every meeting, especially the numerous, lower- and mid-level confabs that happen every day. But knowing the optimal way to proceed is useful, and can pay off nicely on occasion, when we do need to plan for a particularly important meeting. So there are a couple of best practice checklists: one for planning a meeting (Figure 15.1) and one for chairing a meeting (Figure 15.2).

Most new managers are attendees at lots of meetings, but don't get called on very frequently to chair them. So meeting etiquette from the standpoint of participants is important: how to contribute in a meaningful way, and be perceived as astute, judicious, and a team player. Figure 15.3 is a checklist of tips for participating at meetings.

Slay the Draggin'

Meetings that drag on are universally dreaded. The sluggish meeting has stubbornly resisted the modern world's trend toward a faster pace the way the cockroach has resisted evolution. Why? There are several proposed reasons: meetings provide a social opportunity to escape; people are basically undisciplined; people like to hear themselves talk; people can't agree.

Figure 15.1

Checklist for Meeting Planning

1. Determine and spell out purpose.
2. Initially consider agenda items and attendees.
3. Consult with stakeholders to refine agenda items and select attendees.
4. Finalize agenda items, set discussion and start times for each, and briefly state desired outcomes.
5. Set date and time (after coordinating schedule with key attendees).
6. Assign duties: notetaker, facilitator/presenter for specific agenda items, timekeeper.
7. Select appropriate background materials, in consultation with key participants.
8. Send out meeting notice, in accordance with any required formal notifications.
9. Send out agenda (may also serve as meeting notice, if other formal notice is not required) and background materials. For major meetings, this information should be available to participants at least three days in advance. This transmission also should inquire whether any attendees will have special accessibility needs at the meeting.
10. Send out meeting reminder 24 hours in advance.

These are all provocative answers. But the real reason meetings drag on is because they can. The people who run meetings allow it, by not serving notice that we care about time. The solution, therefore, is to strongly make the point—in several ways—that we *do* care about time, and we're going to treat it as a precious commodity throughout the meeting process.

For expediting meetings, first, start on time. Second, list the start discussion time of each agenda item and stick to it. Strict adherence to a schedule sends a message—one that most people will support.

It's a very common failing to start meetings a few minutes late. It's customary for greetings and small talk as people arrive; a pleasant interlude in our culture that establishes a cordial atmosphere. When this chitchat runs past the published start time of a meeting, it also sends a signal—that time is not of the essence. Knowing meetings often have such a soft start time, people may drift in a few minutes late, since they won't miss anything. And once everyone is there, when the meeting is belatedly called to order, people then won't discipline their comments. The feeling of leisure time persists.

If you're the chair, a good plan for launching a smooth and sharp meeting begins by arriving at the location at least 15 minutes early. This way, you can participate in the unofficial, but important, pleasantries of greetings and small talk. Then, at precisely the appointed time, call the meeting to order. Don't be delayed by the absence of a few people, or even by someone's comments that "so-and-so is just out in the hallway, on their way in." Start the meeting with a welcome, and your preliminary comments about the purpose of the meeting.

Figure 15.2

Checklist for Chairing: Day of the Meeting

1. Arrive early (handle unforeseen logistical details, engage in small talk).
2. Start on time.
   - Curtail small talk precisely at posted time to begin meeting.
   - Officially launch meeting exactly on time, even if several participants are late (they can catch up via minutes or be brought up to speed by word of mouth later).
3. Articulate purpose of the meeting and set ground rules.
   - Ask for muting of phone/text messaging.
   - State intention to start discussion of each agenda item on time, so that overall meeting will end on time.
   - Note who will be taking minutes, and who will help keep time.
4. Announce items on the agenda with names of facilitators or presenters.
5. Encourage participation by everyone.
   - Seek to compliment all contributions as helpful.
   - The Chair should avoid taking a strong position on an item until discussion on that item is concluded.
6. Assert ground rules.
   - Maintain focus on agenda; use "parking lot" of flipchart or whiteboard to note off-topic points for later review. After the meeting, review those points and follow up later with all participants.
   - Follow Robert's Rules of Order (see Figure 15.4) in considering motions, taking votes, and other proceedings (unless organization is otherwise bound by law to some other rules).
   - Do not permit personal criticism; dissuade interruption of speakers.
7. Close out each agenda item at specified time.
   - Monitor the time during discussion. If progress is slow, remind participants there is limited time to reach resolution. In instances where discussion has been thorough, ask if anyone might call the question, move to vote, or otherwise take action. If not, note that this item may need further study and later resolution.
   - A couple minutes before time expires on each item, announce that it's time to resolve this item or move it over for future consideration.
8. Fix responsibilities for each action item.
   - Summarize decision or other action for each item.
   - Note who has responsibility for each item, along with the timetable for any next steps.
9. Finish overall meeting on time.

Figure 15.3

Checklist for Meeting Participants

Before the Meeting

1. Review agenda, consider relevant issues to you, and points you may wish to raise during the meeting. **If the meeting is not relevant to you and you don't see how you can benefit or contribute, question whether your presence is really necessary.**
2. Read background materials.
3. Have a general understanding of the basics of Robert's Rules of Order (see Figure 15.4), and especially know the procedure for offering and amending motions.

Day of the Meeting

1. Arrive early (engage in small talk; be ready to start on time).
2. If meeting does not have formal name tags at seats, make an informal seating chart in your notes, to help you recall names and positions.
3. Mute your phone/text messaging devices.
4. Don't hesitate to speak up when you have something to ask or add. You have to show you are a sharp, engaged team player in a courteous manner:
   - Be concise and precise.
   - Don't interrupt other speakers.
   - It's OK to challenge other viewpoints, but don't be contentious.
   - Stay focused on the agenda item being discussed.
5. If any action items are assigned to you, note exact details of what's expected, and the timeline.

The impact of your on-time start will resonate in this meeting, and echo onto future meetings in your charge. Don't repeat yourself as latecomers arrive; they usually can catch up fairly quickly, or get updated by word of mouth during break time. If they're significantly late, they can read the minutes afterward.

Start the meeting by stating the purpose, which should also be printed on the agenda, and briefly cite the agenda items. Emphasize your intention to end the meeting on time.

In many cases, this type of meeting launch will be all you need to establish the importance of time; the sense of urgency in keeping things moving is usually contagious. If you gently keep things on track, prodding here and there to prompt things toward closure through votes or other action, and start each new agenda item on time, you'll have a good chance for a tight and tidy meeting.

Sometimes, however, more drastic measures are needed to expedite meetings. For example, let's say you've learned at your regular monthly meetings that several of the attendees never bother to read the background materials. These folks want to waste long periods of time during meetings chatting about history and debating facts explained in those documents they might have studied in advance. You can sometimes head off such behavior when sending out the agenda and background materials, by adding a cover note stating: "Please review this material in advance. The schedule set for each agenda item and its discussion will be strictly adhered to." The good team players will get the message; the incorrigible ones must be worked around.

Then, of course, there's the problem of long-winded participants. If you've already followed the above suggested tips to serve notice about the essence of time, and they're still droning on, you're faced with two options: the "soft signal" to wrap up—typically appropriate when the windbag is your boss or otherwise senior to you—or the "hard-plug pull," which is much more satisfying.

Soft-signal wording could be: "I hate to interrupt, because Mr. Prattler certainly is putting this issue into perspective in a very compelling way. But our agenda time has run out, and I'm wondering if we can resolve this with some action now, or if we should hold it for a discussion at a later time?" Play it by ear at that point; try to move on to the next item, but hey—keeping your job is more important than an on-time meeting.

Figure 15.4

Robert's Rules of Order

Who was Robert, and how come he gets to set the rules?

During the United States Civil War, U.S. Army Brigadier General Henry Robert was asked to preside over a church meeting in New Bedford, Mass. By his own account, his lack of knowledge about how to run such an event made for a very unsatisfactory occasion.

The General then researched common guidance on running meetings, but found only conflicting ideas. He therefore wrote his own manual of parliamentary procedures for organizations, published in 1876 as *Robert's Rules of Order*. His rules are loosely based on procedures followed in the U.S. House of Representatives, modified to fit more common circumstances in social meetings.

Robert's Rules of Order is not legally binding, but is widely accepted as the official guide for running meetings. In fact, the copyright expired on the original *Robert's Rules* many years ago, and there are now versions in the public domain. You can read up on the rules and reference them for free at several websites. Two of those with excellent search and reference capabilities are *www.rulesonline.com* and *www.robertsrules.org*.

It's a good investment for new managers to buy a hard copy of the rules in brief. This is an abbreviated, user-friendly version of the official 2011 edition rules.

The 208-page book's official title is *Robert's Rules of Order Newly Revised In Brief, 2nd edition.*

Who wouldn't prefer the hard-plug pull? For example, you hold up your hand to cut off the blabbermouth in mid-sentence, and say something like, "In the interest of our very limited time, I want to remind everyone we can only move on by talking about future solutions. Would anyone like to make a motion at this time (if you're using Robert's Rules), or do we need to schedule this item for future consideration?"

There are more extreme suggestions to keep meetings short, including riveting attention on the time by using prominent clocks or timers with audible alarms. Another approach is to have everyone stand during the entire meeting, which eliminates participants getting overly comfortable. One unique idea is to furnish participants with extensive liquid refreshment, with the stated rule that the meeting is over when the first person gets up to use the restroom.

For formal business meetings with attendees from outside your organization, we don't recommend such methods. But if your regular internal meetings are seriously bogging down and you've not had success with gentler, kinder techniques, more extreme measures to speed things up might be worth a try.

Remote Meetings: Conference Calls, Webinars, and Teleconferences

From simple telephone conference calls to sophisticated teleconferences, the several levels of remotely attended meetings have some things in common:

- They allow some degree of participation without being physically present, saving the time and expense of travel.
- They exchange ease of participation for some loss of sensory information (inability or reduced ability to see other participants).
- Without immediate visual cues to help in "speaker traffic control," a common problem of remote meetings is "simul-talk"—the tendency of more than one person to start talking at the same time.
- The open-architecture nature of these meetings makes them especially vulnerable to accidental noise, such as inadvertently activated hold music, barking dogs, and bathroom sounds.
- Video imaging of other participants does not allow for direct eye contact.
- And most importantly, in order to be effective, they all still require the same premeeting preparations: development of a structured agenda and advanced distribution of discussion materials.

The basic conference call—involving telephone participation by some or all attendees—has been a regular meeting technique for several years. This type of easy-to-set-up meeting requires the least equipment: a decent telephone handset. However, the conference-call meeting is the most difficult to keep on track, because the lack of any visual contact interferes with getting and keeping the attention of attendees.

If you want to conduct conference-call meetings, and your company doesn't have a telephone or IT support team to guide you, some quick research on the Internet should lead you to a conference-call provider with the right blend of cost and services. You will have to make choices such as whether you want to pay one overall bill per call, or have the participants billed for their time on the line, and whether you want the call recorded for playback.

The next step up from the conference call—the webinar—is more complex and provides more meeting involvement. This step adds a visual dimension to the audio connection in a remote meeting, typically allowing a presenter to share digital slide presentations, webpages, or other multimedia content with participants. Most webinar arrangements allow participants to interact with the presenter by asking questions or expressing opinions in real time through instant messaging or email.

The choice of a company to provide webinar setup and regular service is an important one, dictating whether you will pay for services on a per-webinar basis, or through a monthly fee. It's easy to learn how to set up a webinar by checking out sites on the Internet that rate these services and provide a matrix to compare what they offer with their prices.

A final level of complexity in the remote meeting is the teleconference or web conference—in which more than one site transmits live audio and video tracks. Teleconferences are normally limited to about six participants, all of whom have the webcams, microphones, and special routing equipment needed to send and receive audio and video tracks. Participants typically see a boxed image of each of the other participants on their monitors. This type of digitally transmitted meeting, although somewhat intensive in equipment and limited in size, most closely resembles live meetings, in terms of participants' ability to interact. Again, if your company or organization does not have a large IT support team, you can get plenty of information by doing an Internet search on top 10 ratings for teleconferences.

With all the exotic capabilities of webinars and web conferences, and the ever-growing cost and travel time constraints of face-to-face meetings, why haven't these digitally enhanced remote meetings completely taken over? Here are some reasons:

- **Perception of high cost.** When teleconferences were first available, the technology was expensive. As costs have dramatically dropped, the perception of high cost has lagged a bit. Attitudes will continue to evolve and the process will become more popular as prices keep dropping.
- **User-unfriendliness.** Nontechnical people are intimidated by the complexity of the teleconference process. Any time a minor glitch results from a poor connection or an unplugged cord—in the absence of a talented IT support team—many small organizations will turn back to conventional meetings.
- **Self-consciousness about being on camera.** Some people are not enamored with their appearance on camera, and many others are simply uncomfortable about being on camera.

- **No direct eye contact.** Even when all participants appear via video, and systems work properly, studies have shown that people react negatively to having no direct eye contact.

So remote meeting alternatives are growing in functionality and popularity, but they're not about to supplant conventional meetings just yet. If they do, managers can successfully participate in them through following the same approaches for all meetings.

ABOUT THE AUTHORS

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