HOW TO RUN EFFECTIVE MEETINGS

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About your instructor

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Sylvia is happy to be back at the City of Madison and looks forward to meeting all the dedicated people there in due course!

She is an executive coach and the director of Voice and Leadership Excellence, in Ottawa, Canada. As part of her work, she leads training sessions on how to run effective meetings, deliver effective presentations, team building through DISC, leadership, and more.

Her 20+ years career spans both private and public sectors, as well as non-profit organizations, and Indigenous communities, in Canada, the US and Europe.

Sylvia's passion is to help people untangle the sometimes messy parts of communication and bring about clarity and resolution with confidence and authenticity.

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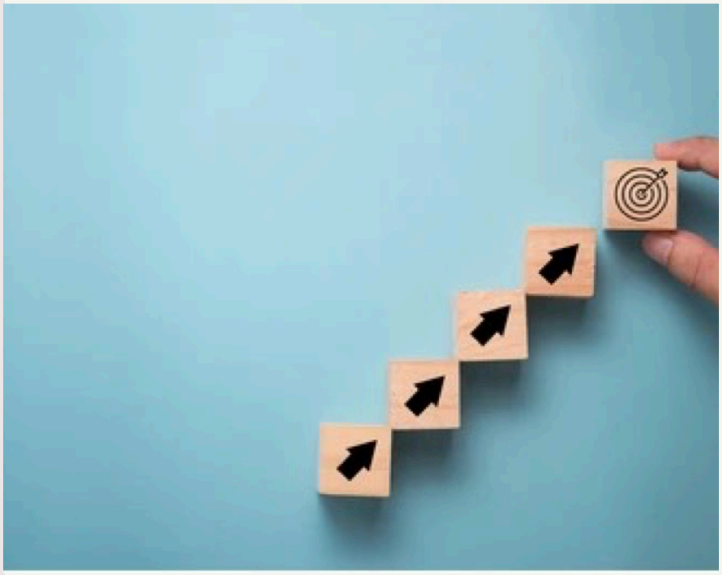
How to run effective meetings

Meetings are an unavoidable part of the corporate landscape, and although they often serve a necessary function, allowing staff members to share information, generate ideas and ensure that everyone is on the same page, they can also prove detrimental to productivity.

The key is to organize and run meetings effectively, so they become assets to one's work, instead of leading to meeting overload and wasting people's time.

Course Objectives

- Lead structured, engaging and effective meetings
- Feel prepared and look forward to your next meeting
- Lead with confidence and authenticity



The Cost of Unnecessary and Unproductive Meetings

According to the Harvard Business Review "every minute spent in a wasteful meeting eats into time for solo work that's equally essential for creativity and efficiency. For another, schedules riddled with meetings interrupt "deep work"— the ability to focus without distraction on a cognitively demanding task."

The Financial Cost

Not only productivity and time, but meetings also affect the budget of an organization. They can easily be termed as one of the most expensive communication forms among employees in the workplace.
Here are some alarming numbers on the amount of money spent on setting up meetings:

- A survey of 6,500 people from the USA, UK, and Germany found that among the 19 million meetings that were observed, the ineffective meetings cost up to $399 billion in the US and $58 billion in the UK.
- Suppose an average employee is making $60,000 per year and a company has 100 employees. In that case, the cost of meetings rises to $2,250,000, while the cost of unproductive meetings per year is $751,500.

Statistics are from Doodle, Inc, and ReadyTalk. Blog.otter.ai

More stats on how meetings are affecting organizations and businesses.

- Most employees attend 62 meetings per month, where half of the meetings are a complete waste of time.
- Executives consider 67% of meetings a complete failure in communicating the sole purpose of conducting them.
- A survey suggests that 92% of employees find themselves multitasking during meetings.
- 41% of respondents confess that they often multitask or all the time during a meeting.
- 69% of employees check their email frequently during a meeting
- 49% of employees admitted that they do other unrelated work during meetings rather than paying attention to the meeting agenda.

Statistics are from The Muse and Atlassian. Blog.otter.ai

In order for meetings to be effective,

they must be:

- Well prepared and organized
- Useful and relevant
- Clear in their objective
- Concise and succinct
- Inclusive and engaging
- Run with a kind yet firm hand
- Punctual and run in a timely fashion
- Have clear take-aways and call to action

So, how can we get better at running meetings?

Experts agree on 3 things: Reduce the number of meetings, have a clear agenda, respect the given timeline. Let's break these ideas down step by step.

1. Meeting analysis and preliminary preparation

Audience - Purpose - So what?

- A - Identify your **A**udience:
  - Who's going to be there? What's their level of knowledge of the given situation or context? Who really needs to be there? Who won't benefit from this?

- P - Establish your **P**urpose clearly:
  - What is the goal and desired outcome of this meeting? Is it to make a decision, to resolve a problem, provide an update, to collect data? Why is it necessary? What essential points do you want to cover? What's the expected action plan?

- S - **S**o what?
  - Why should they care? What's in it for them?
  - Is this meeting absolutely necessary? What's the use of it? Could you achieve the aspired result through different means? (Survey, quick poll, messaging, etc.)

Establish next steps

Assessing the need for a meeting

Opting for possible alternatives

- Reassess the need for everyone to be present - time is precious and many would be content with meeting notes!
- Reach out and ask people if they want to be included in the meeting (give them options!)
- Find out if you could replace the meeting with a poll or a simple email people can answer in a few sentences

Identify the number of participants:

- Who should attend the meeting? What's the maximum number of participants needed to achieve results?

Communicate context and expectations:

- The effectiveness of your meeting relies on how well you prepare it in advance. Give participants ample notice for the meeting. Provide a clear agenda (they can possibly contribute to) and a timeline for them to get back to you. Have a compelling headline. Ask participants to come prepared with their ideas, and possibly designate one or two people who will address a particular point during the meeting.

- Send agenda with supporting documentation if necessary. Set the time.

How many agenda items?

You cannot cover everything. **Try to restrain yourself to 3-4 essential topics**, otherwise you will find yourself - and others - overwhelmed, with the need to convene yet another meeting to make up for lost time and inefficiency.

Example of the Rule of 3:

- Item 1: The problem
- Item 2: The impact on our team/organization
- Item 3: The solution (leave enough time for the solution! You don't want to be stuck discussing the problem for hours!)

The fewer meeting topics, the better. A lot of discussion can be avoided by sending a clear email or poll beforehand.

- According to Stanford professor Robert I. Sutton, meetings are more productive when only seven people (plus or minus two) are in attendance.

- Some researchers suggest that multitasking can actually reduce productivity by as much as 40%. Being tech-free in meetings will greatly improve your absorption of information and engagement.

- A report suggests that 91% of employees daydreamed during their meetings. In comparison, 45% felt overwhelmed by the sheer number of meetings they attended.

2. Structuring your meeting and meeting procedure

In order for a meeting to run well, it needs to be structured and organized. A very simple roadmap to follow is:

1. Introduction: This is where you connect with participants, set the context and objective of the meeting, as well as the Rules of Engagement* (P)
2. Body: This is where you discuss the meeting items laid out in your agenda (Rule of 3)
3. Conclusion: A crucial part of the meeting, in which you wrap up, reiterate key points their importance and lay out the next steps. Don't miss it! (S)

Meeting prerequisites and procedure

- Designate a facilitator and/or co-facilitator for the meeting, if you need that extra support
- Designate a time keeper, if staying on track is not your forte
- Designate a note keeper. You don't need to do everything yourself. Delegate!

To begin:

- Greet and thank participants for their time. If necessary, introduce yourself and others, explain your role (or the roles of key people attending).
- Establish context, purpose and objective of the meeting. ("By the end of this meeting, we would like to…";"Our goal, by the end of this meeting, is to…")
- Brief tour de table if necessary
- Reiterate prep-work or results of poll/survey, etc., if relevant
- Set expectations ("I want to acknowledge that this is an emotional time for everyone… this could bring up a lot of emotions and controversy….")
- Set rules of engagement ("Because I promised we'd be done by noon, let's agree on staying focussed on the objective. If we steer from the objective or get into the weeds, my co-facilitator will gently remind us to stay on track. Or we can use the parking lot for follow-up. Is that ok?")
- *Get an agreement!*
- Explain meeting procedure ("I'll give a brief overview and then ask everyone to keep their comments to no more than 1 minute.")
- *Get an agreement!*
- Start with the most important meeting item

Concluding the meeting:

- Summarize key points and connect them back to the objective
- Clarify if necessary, and lay out the most relevant outcomes and *next steps*
- Send a summary of the notes with key take-aways
- *Thank people for their time!*

3. Inclusion and Engagement

People have great ideas, but they don't always have the confidence or eloquence to convey them. Some people are quicker on their feet than others and can thereby easily monopolize the discussion.

As a facilitator, try and engage meeting participants as much as possible. Here are some ideas to achieve that:

- Emphasize the fact that everyone's ideas are valuable
- Ask people beforehand to share ideas that you can then bring up during the meeting.
- Tell people beforehand that you'd like to hear from everyone and that they should come prepared with a *short summary* of their thoughts/ideas.
- Use the chat function if on a virtual call. Post-its work well for in-person meetings.
- Listen carefully. Acknowledge participants' contributions and thank them. Reflect back what you heard.
- Call people out by name and ask them directly what they think. Be kind and patient.
- Reading off slides or a document, or ploughing through an agenda kills engagement. Use as few slides as possible, even fewer bullets and look up! Commenting or summarizing key points is best. *Do not monopolize the meeting !*

Caption

4. Confidence and leadership:

If you are the meeting facilitator, your role is to keep things on track, efficient and organized. In order to that, it's essential for you to convey authority and confidence. How do you achieve that?

- Come prepared and set your intention for the best possible outcome
- Take a few moments before beginning of the meeting to relax and go over the agenda
- Use your voice well and project it with confidence. Slow down. Breathe
- Look at meeting participants (or into the camera) when speaking
- Lay out the rules of engagement (especially if it might be a contentious subject)
- Go into the meeting with the spirit of giving people the opportunity to come up with creative solutions. This can only be done if you run the meeting effectively.

When meetings get derailed….

Meetings are bound to get derailed or degenerate into sidebar conversations.

What's important is to come prepared for these eventualities. If you anticipate people going off track, preempt the situation by referring to the Rules of Engagement, set at the very beginning of the meeting.

"I know that this topic is going to generate a lot of discussion and even sidebar conversations. As you know, we've agreed to an agenda in the interest of everyone's precious time. Can we all agree to stay on track? I'll give a gentle nudge to get back on track if we get sidetracked, is that all right?".

If you're anticipating a lot of discussion and consequent distractions in the chat, disable the chat function. Explain to participants that the chat will be closed for the first 10-15 minutes, and then reopened for discussion.

An ounce of prevention is worth a pound of cure.

What if someone actually derails the session? Assertively speak up and say: "I know this is important to you/this is such a great point, but we have to stay focused. Since we agreed to…, that means we have to stick to the agenda. We can always have a follow-up meeting to discuss this. We've got to be mindful of other people's time here. Thanks."

Use the "Parking Lot". The Parking Lot is a white board, page on a flip chart, or simply a note pad on which the facilitator (or assistant) takes notes of issues that come up that may not directly have to do with the agenda. Using the Parking Lot validates participants' ideas while taking them out of circulation to keep the meeting on topic.

Summary

- Know your audience
- Have a clear objective
- Be clear on the “So what”?
- Consider alternatives to inviting the whole organization
- Prepare a reasonable and coherent agenda
- Have a great opening and lay out objective
- Keep meeting items to a minimum
- Engage participants and run meeting with confidence
- Be mindful of the time and take notes
- Offer a logical summary and actionable take-aways

Key take aways:

- **Reconsider the need to call a meeting every time.**
- **Identify what you want to achieve *by the end of the meeting.***
- ***To that end, determine who really should be there.***
- **We don't need so many meetings: if you invest a little more in the back end of preparation, you will end up running fewer, shorter and more effective meetings.**
- **Alternatives to meetings: Pre-meeting - ask potential attendees if/how they'd like to contribute or attend. Ask them for their key insights and ideas.**
- **Send deck or memo 1 or 2 days beforehand so that team gets acquainted with material.**
- **Ask for *specific input*. The more specific, the better.**
- **Instead of discussing everything at the meeting, bring people together simply for a quick recap and vote, decision-making, brainstorm on next steps.**
- **Many people would rather not have to attend. Send them the minutes of the meeting only. Ask them if they would rather attend the next time.**
- **Carve out meeting-free days. Avoid packing all the meetings into the same day, if possible. Allow for breathing space between meetings.**
- **Consider the Jeff Bezos technique: everyone read memo/report together in silence, then open discussion with ROE.**

The Meeting Planner - A useful preparation tool for better results

Taking a few minutes to identify the context and objectives of your meeting can help you feel better prepared. Here are some questions to galvanize the process.

You	Attendees
	Who is attending the meeting?
What is the reason/context for this meeting? Why is it necessary?	
What are my objectives? What points do I want to cover?	What are their concerns/goals? What would be the best outcome? Can we find a mutual aim?
What are my emotions?	What emotions can I expect? How will I best respond?
What are my expectations?	What are their expectations ? Any shared expectations?

How will I open the meeting? What agenda topics will truly serve the purpose of the meeting?	What questions or concerns could be raised? How will I best respond or react?
How will I know the meeting has been successful?	
How will I conclude the meeting?	What next steps could we/ they commit to?
Where, when and through what medium will we have this meeting?	

RESOURCES AND REFERENCES:

PRINT:

- HBR Guide to Making every Meeting Matter, Harvard Business Review
- Herding Cats and Cougars, William Keens
- The Presentation Secrets of Steve Jobs: How to Be Insanely Great in Front of Any Audience, Carmine Gallo.
- Getting Things Done, David Allen
- Five Stars: The Communication Secrets to Get from Good to Great, Carmine Gallo

LINKS:

- https://hbr.org/2017/07/stop-the-meeting-madness
- https://blog.otter.ai/meeting-statistics/
- https://www.forbes.com/sites/tonydicostanzo/2015/07/07/3-reasons-to-make-your-next-meeting-tech-free/?sh=7be9f5639c6e