



## Effective Meetings – Part 1, Planning

### Why meet?

It is so easy to fall into the trap: *sure, let's call a meeting and talk about it!* Then, you round up the usual suspects, spend an hour – or longer- “talking about it” but end up leaving the room just as unable to move forward, having wasted an hour (or more) of your time - and theirs – and increasing the overall organizational frustration quotient!

Meetings can often be the best method to foster group communication in order to achieve certain results: to share or get information, to brainstorm options, to make group decisions, to plan, to clear the air, or to promote team-building. But too often we default into having a meeting when there might be a better way of accomplishing our objective. So, if you really want to be part of a major shift in how your team operates, start by making meetings productive and worthwhile for all participants. Let's look at how we can do this.

### Why it matters?

*A company's meetings are where the cultural "rubber meets the road," and the espoused theories about "who we think we are" become practical demonstrations of "who we really are."*

*Daniel N. Robin*

### What to consider before you even get to the meeting

“Failing to plan is planning to fail”<sup>1</sup> and an unplanned meeting is one of the most frequently-experienced failures in our everyday work lives. To avoid this common and dreaded loss, consider the following steps when you are contemplating calling a meeting:

1. Don't meet

Yes! The first step to planning a meeting is to imagine that you cannot hold the meeting at all- this will force you to be very clear about your objective. What are you trying to accomplish? Could you do this by using email communication? Is there one person who can give you the information you need during a brief phone call? Can you delegate information-seeking responsibilities to someone else in your team? Start by exhausting as many options as you can. If you conclude that you must meet, keep moving down this list.

2. State your purpose

Make yourself write it out: *we are meeting to (fill in the blank)*. As Stephen Covey would say, “begin with the end in mind.” Have a clear purpose for the meeting and what it will accomplish.

3. State the topic(s) to be discussed

Once you know what you want to achieve, list out the elements in the conversation that will help you get there. Is there information to be shared; a decision to be made? If you are presenting information, define what that is and its value. If you are gathering input, you may have your topic in the form of a question to be answered.

#### 4. Decide who will be invited

Participating in meetings can provide organizational context for all who attend but having people sit at a meeting to watch someone else's conversation is counterproductive, not to mention aggravating. Invite only those who will actively participate. Meeting attendees should include individuals who benefit from or contribute to achieving the meeting's objective. If you want others to know what was discussed, you can follow-up by distributing minutes or providing a summary at a later time.

#### 5. Develop an agenda

Once you know the issue(s) to be considered and who needs to be included in the exchange, start shaping how the meeting will evolve by drafting an agenda. Since you've already thought about your purpose and topics, agenda items will flow easily. What you will add now is more structure regarding:

- Which items should be addressed first (start with those which are most important or difficult)
- How much time you will allocate to each (anticipate any difficult discussions)
- Who will have a role (as presenter, note-taker or facilitator, for example)

Share your agenda with participants before the meeting to allow them to prepare for it; this will increase the chances that your meeting will be effective and productive. Distributing the agenda ahead of time allows others to shape their thoughts for providing feedback or prepare information that might be relevant to the discussions. In fact, you can make the agenda work double duty and also use it as an invitation to the meeting by including the following:

- Date (avoid Monday mornings or Friday afternoons as well as holidays or competing events);
- Time (both beginning and ending – add a break if a meeting lasts over an hour);
- Location (confirm availability and consider suitability and accessibility);
- Purpose; and
- Discussion items in the order in which they will be addressed, who will present each, and the time allotted.

In his widely-read book *Death by Meeting*, author Patrick Lencioni proposes not having an agenda at certain types of meetings (weekly tacticals) and, instead, allowing the priorities stated by team members to dictate what needs to be reviewed. You might get to a point, especially on recurring team meetings, where this might make sense. However, even Lencioni recognizes that a meeting without an agenda runs the risk of going astray. A clear agenda not only serves as reassurance to participants that the meeting has been well-planned and their time will be wisely spent but also provides the meeting planner with a clear understanding of what the meeting will entail and how its purpose will be accomplished.

#### 6. Call the meeting

Now you are truly ready to say "let's meet." Send out an email to those who will participate in the meeting and include with it a copy of the agenda. Make sure your invitation includes information on whom to contact with questions, a date and contact for attendance confirmation and, if needed, parking instructions and/or directions to the meeting location.

**Be a catalyst to a culture of effective meetings.**

Be mindful that every meeting you call is an opportunity to create your own reputation for effective, meaningful meetings, and for sending a message about your own leadership abilities and your time and resource management

skills. Proper planning will help you avoid the “meeting default mode” and let others know that when you say it’s time to meet, there is a well thought-out reason behind it; that they will be participating in a meaningful exchange that will be of benefit to all who are involved.

Finally, you may also want to remember these six steps when you are invited to attend a meeting. Consider asking for an agenda ahead of time. Or, at a minimum, ask what the purpose of the meeting is and how you might benefit from or contribute to it; perhaps, also, how long it will last and if there is anything you need to do in advance to prepare for it. Let others know that your time is valuable and, at the same time, help them develop their meeting planning skills.

<sup>1</sup> Proverb attributed to Alan Lakein, Winston Churchill and Benjamin Franklin.

## References

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