Essentials

Meetings

Most strategic decisions are made in meetings – or should be made in gatherings of the organization's senior leaders. When 3 or more people gather together, we call this a meeting. In groups, new alternative ideas emerge that simply can't when situations are explored alone.

Most people dread meetings. Granted many meetings are unnecessary. Meetings are often just hour-long displays of power and politics that eat into the time leaders have to get "real" work done. But since people communicate in groups to get things done, most organizations could not function without meetings. It is estimated that organizations spend 7 – 15% of personnel expenses directly on meetings, not including the time spent planning these meetings. Rather than improve meetings, most people assume they are an unnecessary evil in the life of an organization.

So, why do people hate meetings? First, most meetings lack drama, making them boring. Second, they lack context and purpose.

> *"'Bad meetings are a reflection of bad leaders"*
> - Patrick Lencioni

To create drama, a natural level of conflict should exist. Hollywood learned decades ago that movies and TV shows need conflict to hold the interest of the audience – viewers need to feel tension within the first 10 minutes or will lose interest and disengage. Meeting leaders can do the same by putting the most controversial topics on the agenda first.

To create context and purpose, leaders must differentiate between types of meetings for strategic and tactical conversations. Why the meeting is taking place and what is expected of attendees must be clear. Without clarity, team members are confused and frustrated by long meetings with little or no resolution of issues.

Ideally, teams should have a minimum of 4 distinct meetings on a regular basis:

1) Check-in
   Time: 5 – 10 minutes
   Frequency: daily
   Focus: schedule
   Purpose: Keep team members aligned; forum for activity and schedule updates

2) Staff Meeting
   Time: 30 -90 minutes
   Frequency: Weekly
   Focus: Near-term objectives
   Purpose: Discus and resolve issues

3) **Strategic**
   Time: 2-4 hours
   Frequency: Monthly
   Focus: Long-term strategic objectives
   Purpose: Discuss and resolve 1-2 issue (brainstorm, debate, share ideas, agree to options/solutions)

4) **Off-site Review**
   Time: 1-2 days
   Frequency: Quarterly
   Focus: Strategic management systems
   Purpose: Strategic assessment of organizational systems

From: Patrick Lencioni, *Death by Meeting: A Leadership Fable*. Jossey-Bass, 2004.

Rather than wait for monthly strategic meetings or quarterly off-site reviews to address strategic issues, leaders can use Ad Hoc Topical meetings to discuss, analyze, brainstorm, and decide critical strategic issues. It is good to keep a "Parking Lot" of strategic issues during Check-ins and Staff Meetings to identify the need and topics for such Ad Hoc meetings. While the name implies it is a meeting that happens on the fly, is if important that the meeting be well planned – focus, decision-making structure and outcomes should be properly defined. Ad Hoc Topical meetings do not need to include the entire leadership team; depending on the subject, a subset may be sufficient. Outside experts or subject matter experts (SMEs) outside the leadership team can also be included. This is not a license for team members to avoid tough issues. The sub-team must report back to the full team for commitment.

On the surface, this may appear to require more time in meetings. Not true. Good meetings provide opportunities to improve execution by accelerating decision-making and eliminating the need to repeatedly revisit issues and result in unnecessary communications. Without good meetings, leaders spend hours a day sending emails, leaving voicemails, and walking the halls ("sneaker time") to clarify issues that should have been clarified in meetings. And, this time increases dramatically as communication cascades through the organization.

This structure of meetings can happen at every level of the organization with one level sharing decisions and the logic for the decision with the next level. This is called "cascading communications" and is used to translate strategic decisions at one level into action at the next level.

Making Individual Meetings More Productive

Separating into four types of meetings will not make team meetings more productive alone. Each meeting must be a productive use of time. How? Implement these ten recommendations for meeting discipline:

1. State purpose of meeting in the agenda and repeat at the start of the meeting.

2. Set aside enough time to achieve the meeting purpose. A great meeting is not how short it is or whether it ends on time, but whether it ends with clarity and commitment.

3. If a decision-making meeting, state the criteria up front and how the decision will be made (see future post on the decision-making continuum).

4. Put the most controversial topics within the first 10 minutes to get participants engaged and before get too comfortable and tired. Seek out opposing views and hold productive debate.

5. Clarify what is at stake – help participants understand the cost of a poor decision and why they should care.

6. Set meeting ground rules (code of cooperation) then hold participants accountable to them.

7. Head off passive aggressive behavior. Be explicit that issues will be resolved together in the meeting, not afterward in the hallway, restroom or parking lot.

8. Filter and focus. Ask participants to filter their contribution to the topic of discussion and on input that adds value. Do not waste time violently agreeing with each other.

9. Distinguish what (topic/problem) from how (process, approach, method). The group has to first agree on what they will work on and then how they are going to work on it. If participants don't agree on both, risk combining the two and jumping all around the topic, losing focus of the purpose of the meeting.

10. Leave 10% of meeting time for wrap up and to create alignment on key decisions and how they will be communicated to the rest of the organization. Also, to evaluate the meting process.

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Without meeting discipline, the floor will be grabbed by whomever can talk the loudest. People who are quieter will have a hard time being heard and eventually check-out of the meeting; valuable ideas will be missed. A "traffic cop" is needed to maintain an open and balanced conversation and protect individuals from personal attack. A meeting facilitator serves this role.

Example

SOS worked with a community non-profit whose meetings were notoriously long and unproductive. Volunteer leaders were attempting to include all four types of meetings into one monthly meeting. Working with the Executive Director and volunteer leaders, SOS helped split work into four meetings in which staff conducted daily check-ins and weekly staff meetings. This freed volunteer leaders to focus monthly meetings on short-term objectives and quarterly meetings on longer-term strategic trends and decisions. Meetings became more focused, and the volunteer Board more engaged. As a result, the organization attracted more funding and served more members of the community than ever before in its history.

Assumptions that Paralyze Strategic Meetings

To lead productive meetings, leaders must deal with three assumptions that often turn productive meetings into unproductive meetings:

Assumption #1: We know what the problem is that triggered the meeting. The focus/purpose of each meting must be properly defined, each item on the agenda focused on achieving that purpose, and clearly communicated to all participants.

Assumption #2: The entire leadership team must attend every meeting. Some issues can be handled on an ad hoc basis without all hands-on deck. Topical meetings may only require a subset of the team; avoid wasting member time attending meetings in which they have no input or expertise to add. Make sure this does not give leaders permission to avoid tough issues, however.

Assumption #3: We know the expected outcome. Before a group tackles a strategic issue, it needs to define success – what is the goal of the discussion? Make the decision or gather input for the decision? Who will make the decision?
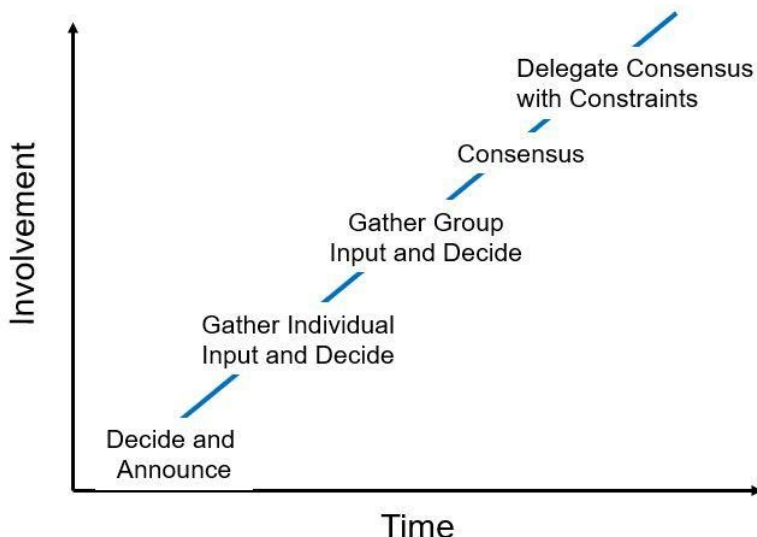
> *"If you obsess over whether you are making the right decision, you are basically assuming that the universe will reward you for one thing and punish you for another."*
>
> - Deepak Chopra

Continuum of Decision-Making

There is a continuum of decision-making options. Options that involve more people require more time.

Decision Making Continuum

A good leader uses the full continuum, using the option best suited for the situation.

"To be careless in making decisions is to naively believe that a single decision impacts nothing more than that single decision, for a single decision can spawn a thousand others that were entirely unnecessary or it can bring peace to a thousand places we never knew existed."

- Craig D. Lounsbrough

Let's explore each option:

Decide and Announce – in this option, the leader makes the decision and simply announces it to the rest of the organization. The leader, in this case, is often viewed as a "dictator." This option is most effective in a crisis when quick and efficient decisions are needed. The main disadvantage is that there is little to no ownership and buy-in from anyone other than the leader. When things go wrong there is no incentive to help correct the situation. In addition, it does nothing to develop the skills/abilities of team members to make good decisions.

Gather Individual Input and Decide – in this option, the leader requests/seeks input from others in the organization then makes the decision using that input. This approach works well for those times when it is difficult to get everyone together face-to-face for sharing and consensus or when poor team dynamics exist within the group. The advantage is that members of the organization will feel they have had voice into the decision and will be more likely to execute it and make it work. It does not work well if the leader has already made the decision. "Dictators" will sometimes try to hide by making it look as if they are seeking input from others when, in fact, the decision has already been made. Also, if the leader has surrounded them self with "yes" people, they may think they are getting good, diverse ideas when in fact they are not and this will impact the quality of the decision.

Gather Input from Group and Decide - in this option the leader call the group together to collect input then makes the decision using that input. This approach is appropriate for decisions that require different perspectives and expertise such as Cross-Cutting Decision. The advantage is that decisions are made decisively and with a greater chance of success after receiving input from diverse sources. The leader can also shield employees by taking full responsibility for the decision, especially if there is high risk. The disadvantages are the same as the Gather Individual Input and Decide option.

Consensus – in this option, the leader and group reach a decision together that everyone understands, supports, and is willing to implement. This approach is good for Big Bet, higher risk decisions that require different perspectives, expertise and consideration of risks. It is a good way to develop the decision-making skills/abilities of other as well. The main advantage is that members of the group will not sabotage a decision they help make/supported in the group meeting. The disadvantage is that it takes time to develop a decision everyone will support and implement and may result in missed deadlines or opportunities

Consensus with Constraints – in this decision-making option the leader delegates the decision to an individual or group to be made by consensus within constraints set by the leader. The leader then removes them self from the decision. This option is good for Delegated Decisions and some Ad Hoc Decisions and develops the decision-making skills/abilities of others within the organization. The leader connects the group to the organization's strategic plan and ensures they do not drift onto something that is not a priority. Fully empowered or self-directed teams often fall into this option. Team members work together on improvement initiatives. Ideas for improvement arise while they are running the process and with data-based tools, they can be quickly vetted and when within the constraints, be implemented. Consideration must be made to changes in team composition as each time a new employee rotates into the team, team dynamics change.

When organizations implement continuous improvement (CI), leaders usually progress through all four options. From "We will improve this way" (Decide and Announce) to "We are going to continue to improve… what should we work on next?" (Gather input from Group and Decide) to "Lets form teams and give them these priority problems to solve" (Consensus with Constraints). It is important to go through these options in sequence to give the organization time to develop, training to be conducted, and trust to be fostered within teams. Otherwise, team may struggle and improvement efforts may falter.

To avoid using meetings as an excuse to avoid hard work, use these practical tips to make meetings work for you.

For meetings to which you are invited:

1. No agenda or clear objective, NO GO. We had a colleague at DuPont who used this frequently and it taught us all to create and share the agenda prior to any meeting with or without him.

2. Be clear on your declines so others do not sit around waiting for you to show up when you have no intention of doing so.

3. Think in fractions. The default meeting length is 60 minutes or some multiplier of 60. Who says a meeting has to be a multiplier of 60 minutes? Instead think in 15-minute increments, based on the meeting objective. Perhaps you do not need to stay for a full 60-minute meeting, but only the 15-30 minutes on the agenda pertinent to your role. Speak to the meeting organizer about this in advance of the meeting.

4. Create clarity. If the meeting objective or agenda item is unclear, ASK. Chances are someone else is unclear as well. Don't waste time until the topic is clear.

For meetings you organize:

1. Have a minimalist mindset:

   o Ask yourself if a meeting is really needed or is it something that can be quickly resolved with a phone call or email?

   o Keep the invite list to the critical few

   o Have mini-meetings that 15 or 30 minutes versus one long meeting

2. Create a solid agenda with clear objectives for each item on the agenda. Expect invitees to challenge you if you do not do this. See item #1 above.

3. Establish standard office hours – a block of time where colleagues and direct reports can 'drop-by' - to participate in informal dialog and reduce the need for formal meetings.

4. Send information before meeting ('homework') and use the meeting time to discuss and decide things you can best do face-to-face.

These practical tips have the greatest impact on an organization when everyone expects them and applies them, saving time across the organization to focus on strategic execution.

"Meetings are by definition a concession to deficient organization for one either meets or works."
- Peter Drucker

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