# How to make meetings not suck

#### Jonathan Vehar



#### ntroduction

lt's said that "nature abhors a vacuum." And as we know,

vacuums suck. Meetings also suck. Therefore, it is human nature to abhor meetings, most of which suck.

Meetings suck energy and time from the people that attend them.

But they don't have to be draining, frustrating, and time-wasting trials of your patience.

In a perfect world, they're an investment in creating better results.

Let's say you were going to invite some good friends for dinner at your home. In all likelihood, you wouldn't just set a time, give them your address and then think about what you were going to serve just as your guests were walking in the door.

And yet that's what many people do when they schedule a meeting. The general topic of the meeting is set up, the time and location are shared, and then they open up the topic and hope for the best once the meeting starts.

"If you had to identify, in one word, the reason why the human race has not achieved, and never will achieve, its full potential, that word would be 'meetings.' -Dave Barry





### The Ten (plus one) Commandments for Good Meetings:

- 1. Thou shalt have a purpose for meeting (thou shalt not meet for the sake of meeting)
- 2. Thou shalt have an agenda that reflects a plan for what needs to be done, what is the desired outcome, and how the group will achieve the outcome
- Thou shalt send an agenda in advance so people can prepare (or decide to not attend)
- 4. Thou shalt not call a meeting when an email will do
- Thou shalt invite the right people to the meeting (don't waste their time because you want to be polite)
- 6. Thou shalt create psychological safety (in other words, thou shalt create an environment where everyone can contribute to the meeting)

- 7. Thou shalt not go off-topic
- 8. Thou shalt honor the timeline and keep it front and center
- Thou shalt always capture and communicate after the meeting the decisions and next steps to ensure progress continues
- 10. Thou shalt have clear guidelines on conduct (standing up? Eating? Camera on? Side conversations? Etc.)
- 11. Thou shalt not assume a meeting must last an hour

#### The cost of meeting

Meetings are expensive for the organization. Let's assume you have 7 people in a meeting for an hour. Depending upon the average salary of the people in the room, below you'll find the cost per hour of the meeting, along with the cost of five meetings per day, and then five meetings per day, four days per week for 48 weeks out of the year.

Average Salary of people in the room	Number of people in the meeting	Cost per hour to the organization of the meeting in just salary	Cost to the organization of five one-hour meetings per day	Cost to the organization of five one-hour meetings per day, four days per week, over 48 weeks
\$50,000	7	\$175	\$875	\$168,000
\$75,000	7	\$263	\$1,313	\$252,000
\$100,000	7	\$350	\$1,750	\$336,000
\$125,000	7	\$438	\$ 2,188	\$420,000
\$150,000	7	\$525	\$2,625	\$504,000
\$175,000	7	\$613	\$3,063	\$588,000
\$200,000	7	\$700	\$3,500	\$672,000

If we're wasting that kind of money with bad meetings, we could probably make better use of that money in the budget. With these costs in mind, if the meetings are badly run, we're wasting a lot of money and losing the opportunity to use this money more wisely.

To be clear, meetings are not inherently bad, just frequently misused. They can be an effective tool, but like any tool, they can be used inappropriately. A hammer is a great tool for driving a nail, but not effective for driving a screw, a terrible tool for cutting a board, and ineffective for making pancakes.

So if meetings are costly, let's just never have a meeting! Right? Not so fast...

#### Why do we call a meeting?

Let's consider the cost of NOT meeting. When done properly, meetings are useful for:

- Creating or sharing strategy
- Creating alignment among stakeholders
- Ensuring common understanding
- Reducing confusion and miscommunication
- Generating solutions
- Getting input from various perspectives
- Tapping the collective genius of the group
- Crafting implementation plans

Unfortunately, too often the reason for the meeting is that we don't have a clear way to communicate to employees. Or people just don't read their emails. Or both. Think about what would happen in your organization if you could be certain that if you sent someone an email, they would read it, comprehend it, and integrate it into their work. If that's not happening, consider that the problem may be more with accountability, communication effectiveness, email volume, relevance, or clarity on job responsibilities.

In other words, meetings can be effective in sharing information, but don't hold a meeting that should have been an email.

### Here are some suggestions for how to deal with meetings:

- **Optimistic solution:** hope for the best, and do what you can to make it work.
- **Pessimistic solution:** Assume it's going to suck. Make a strategy for how to do something else without others noticing.
- Impolitic solution: Don't attend it. Feign illness, go home or blame technology, do real work and save the company money.
- Practical solution: Don't automatically call a one-hour meeting. Think about why you're bringing people together and away from their individual work responsibilities.





#### Invest in making them efficient

Yes, there is real skill to running efficient meetings (and yes, we teach that). Yet the low-hanging fruit is for us to take ten minutes before the meeting to think carefully about the meeting to consider not just who needs to be there, but also how to make it a smart use of the time of everyone in the room.

The very least that is required to ensure we're not squandering the time and resources of the people in the room is to think through meetings and walk in with clarity about why we're meeting, what is the desired outcome and how we'll get there. There's certainly more to holding productive meetings than that (as we'll detail), but this is the bare minimum. Not doing this is like flushing your talent budget down the drain (see the table on page 3 to determine just how much money you're throwing away). Planning the effective use of the time of the people in the room can help create value that is beyond the sum of the individuals' work (what jargonists like Jack Donaghy call "synergy"), and creates better solutions and outcomes.

"A meeting is an event where minutes are taken and hours are wasted" *-James T. Kirk* 

#### What is the purpose of meeting?

Pilgrimage identified five key reasons to meet:

- To inform: ensure people are aware of what they need to know and have the opportunity to ask questions and eliminate misconceptions quickly. When do we have an "inform" meeting when we could simply send a message? Use this guideline: inform in a meeting when the subject is complex and where misinterpretation can sink the boat. If not, consider a well-crafted email or video.
- 2. To explore: these divergent thinking sessions are focused on bringing people together with different perspectives to fully understand our options and cover the full territory of what could be done. The goal of these meetings is to leave with a long list of new facts, ideas, solutions, questions, or other types of options.
- 3. To debate: before an effective decision can be made, we need to give people the opportunity to discuss their opinions and work through the pluses and issues of options. Where exploring meetings are judgment-free to ensure we explore all the options, the meetings where we debate are characterized by sharing opposing judgments to ensure that we're headed in the right direction, even where we listen to other points of view.
- 4. To decide: deciding by yourself is a valid choice when we know what we need to do and it doesn't impact others. When we need other stakeholders to align on decisions, we bring people in to ensure that we create the shared responsibility and ownership that enables a decision that people support.

5. To connect: leadership and teamwork is fueled by relationships, and people are more likely to engage with those that they like. In other words, the vitality of a team is driven by the strength of the relationships between people. This is critical for improving employee engagement (if done well). Sometimes this is purely social, sometimes this is to better understand one another, and sometimes this is a celebration of accomplishments (don't forget to celebrate accomplishments)!

People support a world that they help create. -Key Dale Carnegie leadership principle



#### Meeting cadence for running the business:

A strategy for reducing the number of meetings is to create a series of regular meetings that enable people to tackle issues as they emerge, rather than having to wait until schedules are free in the next week or two (in one organization, it was impossible to find time for people to meet unless it was four weeks out because the organization was swamped with meetings).

The book *Scaling Up*, and other books that focus on helping people run their business more effectively and efficiently, details a cadence of regular meetings:

**Daily:** a meeting that lasts no more than 15 minutes where all employees discuss tactical issues that impact others and provide updates with three key sections of five minutes (max) each:

- What *specifically* am I working on today don't just cover generalities, since the more specifics we share, the more we ensure alignment with others
  - Not: "I'm preparing a contract"
  - Rather: "I'm preparing a contract for Lee for 5,000 titanium snurbles to be delivered on April 1st." This helps others understand what's coming down the path:
    - Production: we need to staff up to produce 5000 snurbles.
    - Procurement: we need to order enough titanium.
    - Transportation: we need to have shipping set up to deliver by April 1st.
    - Production planning: we need to back up the date for when production needs to be complete to meet the transportation schedule.
    - It also ensures alignment:
    - "Wait, 5,000? No, Lee wants 500. It's Washington that wants 5,000."
    - Or "No, Lee changed the order from titanium to chromoly!"

- How are we doing against the organization's most important daily metrics (e.g. sales calls, website visits, consultants deployed, snurbles produced, new enrollments, etc.). Are we on track? Or are we behind?
- Where are you stuck? This is an opportunity for people to learn how they can help out or make connections. DO NOT start problem solving in the meeting...that's doesn't fit into the 15 minutes. Take it off-line with the right people. NOTE: if people aren't stuck somewhere over a long period of time, check in to find out what's really going on...we all get stuck).

*Pro-tip:* Key to this meeting working successfully is someone deliberately telling people to "take it off-line" the minute an update turns in to discussion or problem-solving.

"Where are you stuck?" Was the topic on one of our daily huddles.

I was stuck because a client had insisted that I use the band U2 as an example of an innovation team, and wanted me to share their approach. I had been unable to find anything through my research.

"I know a guy who's done some work with them," said Tim, our partner in Paris. A week later I found myself talking to a very famous music producer of several of U2's albums because the producer's wife was college roommates with Tim's wife.

### Where are you stuck? Don't hesitate to ask for help.

Weekly Status Update (or "S'Update"): While

the daily meeting should take care of immediate issues, the one-hour weekly meeting enables people to focus on their three (or so) key priorities and the tasks around them. The goal is to tap the collective intelligence of the team on one or two important topics. Here's a basic agenda:

- Build relationships and connections by sharing good news for five minutes.
- Review the status of the key priorities of the team and identify any places where the dashboard is "red" and how to move it forward *after* this meeting ("take it off-line"). Don't rehash what's been covered in the dailies. Focus on sharing the status of key measures and how we're doing against key timelines. Are we on track? Off-track? If off-track, make a plan to bring the right people together at another meeting to get back on track and determine who needs to be part of that conversation? The key: separate the update from the solving of the problem, otherwise you'll never get through all of the updates.
- Customer/Employee information/data/ feedback to identify key issues.
- Problem-solving on any pre-defined issue that relates to key organizational priorities.
- Next steps:
  - what will be done
  - who is accountable for getting it done
  - by when
  - reporting to whom

"Ensure that everyone knows the plan, the status against the plan, and the areas requiring special attention." -Alan Mulally, former CEO of Ford and Boeing Commercial **Monthly:** a management meeting that is focused on "learning, sharing and problem-solving vs. a day of mind-numbing reports." (Scaling Up).

**Quarterly and annually:** work on and update the strategy as needed, and tackle specific long-term or big challenges facing the organization.







#### Meeting cadence for building engagement

In addition to a laser-like focus on the business, leaders of high performing teams know that they also have to have a laser-like focus on the people (*Contagious Success*).

To build engagement, we suggest a quarterly cadence of one- to two-hour monthly meetings that don't involve the actual work of the team, but is focused on bringing the team together to understand each other better. This cadence includes the following key items:

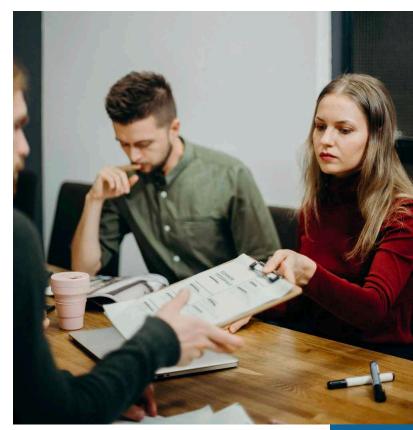
- Month 1: Work together to further build a specific skill, reflect on how these skills show up with the team, and plan their application (e.g. Excel, time management, email effectiveness, written communication, decision-making tools, data analytics, WTH is block chain? etc.).
- Month 2: Learn about each other with a team or individual assessment (e.g. DiSC, Meyers-Briggs, FourSight, etc.)
- Month 3: Engage in a fun team-building activity where the only agenda is to have fun together. This can range from "wine and paint" sessions to axe-throwing to lunch at a new restaurant to scavenger hunts to...whatever appeals to a team member enough that they're excited to organize it!

## How to structure your meeting:

One of the keys to a great meeting (in other words, one that doesn't waste time) is a Power Agenda.

With a small investment in upfront time to craft an agenda that details the issues to be addressed, the approach for addressing each issue and the desired outcome, any meeting can be put on a time diet, to make it lean and efficient. What a change!

A well-constructed agenda helps keep meetings effective and efficient. When distributed in advance, the group can think about the issues, prepare properly, and set realistic expectations for the meeting.



#### **The Power Agenda**

The power agenda is your "power tool" for ensuring that your meeting isn't a vacuum cleaner (i.e. sucks). For most meetings, creating this takes about 10-15 minutes. If you don't have time to think this through, then you're not ready to convene a meeting.

**Purpose - Issues to be addressed:** this is the "why" of the meeting or topic. A power agenda fully describes the issues that will be addressed in the meeting. For example:

Instead of: "Production issues" (vague, ambiguous, and not informative!) Write: "How might we get unit #3 to produce the product up to specification?"

**Process - Method:** a well-crafted agenda states the process that will be used to address each issue.

Instead of: "Discuss" or "Get input" (doesn't allow the group to prepare for what they'll be doing)

Write: "Structured brainstorming to generate ideas, then narrow the list via the dot-voting, followed by selecting the top three ideas on which to move forward"

**Product - Desired Outcome:** agendas that create progress declare the goal for what will be accomplished at the end of each agenda item. This helps the leader run the meeting with outcomes in mind, and the group knows what to expect and where the meeting is going to end up.

Instead of: "Improve productivity" Write: "Three new ideas for how to improve the productivity of unit #3"

**Duration:** Done right, the agenda clearly indicates how long the group will realistically spend on each issue. When time is up, the meeting owner determines whether to spend more time on the issue or move on to the next issue. The leader makes the choice to spend more time on the issue with the realization that s/he will have to sacrifice other items on the agenda or run late. Unless timing is intentionally managed, the Power Agenda is worthless and weak.

#### Tips for planning your meeting:

Use "discussions" sparingly. What is the point of the discussion? To inform? Debate? Explore? Decide? Most "discussions" are merely rambling wastes of time unless they have a specific focus.

A meeting doesn't have to be an hour. Don't think that the standard unit of measure of a meeting has to be an hour or even half an hour. If you can get it done it :22 minutes or :44 minutes or an hour and 10 minutes, make it so

Invest in connecting personally: at the very least, allow some time at the beginning of the meeting to build personal relationships. "Peter, tell us about your vacation?" or "Let's hear three pieces of good news (personal or professional)" or "What was the first concert you ever attended?" Leadership and teamwork is fueled by relationships.

**Priority:** An important consideration for the agenda is the rating of importance of each item. Creating a scale (oxygen/water/food, or high/ medium/low; etc.) that prioritizes the items helps the leader address the most important issues first. This helps ensure that the less important issues are the ones that get dropped if the meeting runs long, rather than delaying the crucial issues until the next meeting.

Owner: Indicates who submitted the concern or issue. This helps to point out who is responsible for making the requests and decisions necessary for the meeting to address their needs.

Decision maker: Sometimes the owner is the one who makes the decisions, sometimes it's the owner's boss. Other times it's the entire group when consensus is required. Be very clear about who owns the decision ("who own's the 'D?'") so that it's clear who decides what happens next.

**Scribe:** It is vital that solutions and conclusions have resolution! To that end, it is highly recommended that a minute manager be involved from the beginning. This individual will take

either formal or informal notes on the agenda issues and input from meeting participants, and will especially capture decisions and next steps. Further, the scribe will also compile said minutes and distribute to those involved for follow up.

Time Manager: This can be the meeting leader or an appointed individual whose focus it is to note beginning time and track time spent on a) each issue or b) overall length of meeting, as well as rounding up issues at meeting's end.

#### Sample Power Agenda

Priority key:

- A = Oxygen (can live for a few minutes without it)
- B = Water (can live for a few days without it)
- C = Food (can live for a few weeks without it)

Duration	Priority	Purpose	Process/ Method	Product / Desired Outcome	Owner	Decision- maker	Scribe	Time Mgr
:40 min	A	Create a theme for client gathering on 6/3	Share background on the client/event, sticky note brainstorming, dot-voting	3-4 concepts for a client gathering to share with the team	Harley	Harley	Pat	Lee
:40 min	В	Inform team about shipping delays for the Alpha product line	Share status update regarding the supply-chain issues that are delaying product line. Answer questions. Have both sales and marketing share the impact on their work.	Group understands the delay and how it will impact their work. Functions have the knowledge to adjust their project plans	Jamie	Harley: Marketing, PJ: Sales	Pat	Lee

#### Other Logistical Considerations

As one shares the agenda in advance - and one should share the agenda in advance -- be sure to also include:

- Date
- Location
- Stop/end times
- Participant names

And also think through logistical needs that you'll have, such as whiteboards, flip charts, markers, projectors, sticky notes, handouts, pre-reads, donuts. Yes, I said donuts. But I'll settle for cookies.

## Always always always capture next steps!

**Next Steps:** A meeting is useless without capturing the next steps that emerge. Yes, capture the decisions and notes from the meeting. But then what? Be sure to capture the next steps in the form of: 1) What's going to be done, 2) Who is accountable for it (one name of the person whose butt is on the line for getting it done, 3) By when it will be complete, and 4) Who needs to know when it's done? Without next steps, the meeting ends ambiguously and usually unproductively. Be sure to capture what will happen next. Will notes be typed up? Will they be distributed? Will there be another meeting? Will someone reach out to someone else? Will someone craft a plan? Will we place an order?

For every item, capture the What, Who, by When, and Reporting to whom. As you're creating these items, think about who or what is needed to assist you in moving your initiative forward and who or what will resist you in moving forward.

#### Sample Next Step Plan

What will be done?	Who is accountable?	By when will it be complete?	Reporting to whom?	
Type up the meeting notes	Chris	(specific date)	Pat	
Distribute the notes	Pat	(specific date)	Leadership team	
Create a first draft of a plan for how to improve customer net promoter score based on today's discussion	Lee (working with Harley, Hayden, and Jamal)	(specific date)	Pat	
Schedule a meeting to review the plan that Lee and team will create re: net promoter score	Pat	(specific date)	Leadership team	

#### Managing the meeting:

The meeting convener or a designated facilitator should focus on the meeting process to ensure that the meeting stays on track and sticks to the agenda. Yes, sometimes it becomes apparent that the agenda isn't going to get you where you need to go, and so on the fly we need to change it up. That happens, but it shouldn't be common.

Having someone who can keep the meeting on track and re-orient the group when they get off track is critical to the desired outcomes being accomplished. When a group gets off-track, the meeting manager can interrupt and either: 1) shift the focus on the meeting by checking with the owner of the issue, 2) suggest that the key players take it off-line and discuss it at another time, or 3) put it on the "parking lot," a list of issues to be dealt with later. Having a place where people can see these items (e.g. whiteboard or shared meeting notes) helps people get back on track.

One of the traps that we all fall into is losing sight of how we're supposed to respond or participate. For example, once someone has shared information and asks for questions, one of the things that people will jump in with is "why don't you just..." or "have you thought about..." While technically these are questions, they're really suggested solutions which is not the same thing as questions about the presentation. Pre-empt this by being clear that you are looking for "questions for clarification, not suggestions." This enables the meeting manager to keep the team focused on the agenda.

## Managing feedback and evaluation of a solution:

During meetings that are focused on debate or decisions, frequently a solution will be proposed with the intention of getting input from the group, and the group immediately tells the presenter everything that is wrong with the solution. It's demoralizing and destructive. Once the solution is ripped apart, what's left? Meeting managers can pre-empt this by framing feedback in the following structure:

- Pluses: First, articulate what the group likes about the idea. What's good about it? What should be kept as the solution evolves and improves?
- Opportunities: If we were to implement this solution, what are the good things that might result? Phrase it starting with "it might..."
- Issues: Since no solution is perfect, what are some of the questions that still need to be answered? What are some of the challenges that need to be solved? Research and practice shows that these issues are best phrased as questions starting with:
  - In what ways might...
  - How might...
  - How to...
- New thinking: once the most important issues have been identified, have the group explore ways to overcome the issues by doing some divergent thinking on how to answer the question posed in the preceding step.

This POINt process has proven to be infinitely useful in structuring a productive conversation for meeting participants so that the challenge owner gets feedback that is far more useful than a list of everything that is wrong with the solution.

#### **Roles in the meeting**

On every team there are *functional roles and team roles*. We're all familiar with functional roles (i.e. Jesse does the accounting. Val does the marketing. Jamie does the engineering). But many effective teams also have roles that focus on how work gets done within the team. In a meeting – especially a small one – people can take on more than one role. Here are the key team roles:

- Facilitator or meeting manager: Coaches the team to follow a process or strategy to maximize their effectiveness and get winning results. Position can be rotated or volunteered.
- Agenda setter or meeting convener: Talks to people in advance to determine what items should be on the upcoming agenda. Informs people what the agenda will be.
- **Decision-maker(s):** the person(s) accountable for the final decision and at the end of the meeting says what will be done or will not be done.
- **Owner:** Submits concern/ issue to agenda setter. Often the person responsible for taking action on the issue. Frequently, but not always, the decision-maker.
- **Time manager:** Based on the agenda, tracks the timing for each item on the agenda and helps the facilitator follow it during the meeting.
- **Scribe:** Records notes from the meeting, using either computer, flip chart paper, post-it notes, or traditional pen and where the group can see it, if possible. Transcribes and distributes notes.
- **Do-right police:** Watches for the well-being of the individuals in the group. Makes sure everyone is included, heard and treated fairly. Encourages people to follow the "suggestions for working together." Keeps an eye on the team dynamics.

• **Meeting debriefer:** Great teams evaluate their performance after each event, whether they're sports teams, military teams, first responders, symphony orchestras, or business teams. This role ensures a short debriefing session follows each meeting. Uses POINt or debriefing questions to get feedback on how the meeting was run.

#### **Guidelines for meetings**

Every organization has a different culture, and the same is true for each function and team. One of the things that enables meetings to run smoothly is to have a clear set of guidelines/expectations for running meetings. Things that are helpful to have decided so that they don't derail the meeting include:

- Starting on time (what does that mean? Start on the dot, or once everyone is there, or fiveminutes after start time?)
- What's appropriate for eating or beverages?
- What technology is allowed to distract participants?
- In virtual meetings, should cameras be on? Microphones muted?
- If we want to speak should we raise hands or just speak up?
- Is it okay to duck out briefly for any reason?
- Phones on mute? Texting okay?
- Is it okay to stand? Pace? Do jumping jacks?
- Is it okay to join the meeting from the car?

You probably have preferences about these things, and others do as well. Being explicit about these things allows one to manage the expectations of the people in the group and easily correct behaviors that don't fit the guidelines. In addition to specific behavioral issues, you may also consider the following suggestions for working together which comes from research on what teams do when they're working effectively together:

- **Have fun!** focus on this and the rest will naturally start occur
- Act as friends behave with each other the way you'd behave with your best friends
- Listen generously listen to completely understand and be willing to give the other person the benefit of the doubt as you hear things that concern you
- Look for what's possible rather than pointing out what's impossible, look for new solutions that will make things better
- Acknowledge and appreciate let people know what they're doing that adds value and share things that work for you about what others are doing
- **Express yourself** speak up when you need to and do it in a way that makes it more likely that others will want to listen and hear you
- Challenge by choice choose to take on challenges that feel right for you. Don't feel pressured to do something that makes you too uncomfortable, but be willing to stretch yourself when there's an opportunity for growth
- **Be coachable** be willing to hear things that will enable you to grow. Being self-aware is critical for leadership success!
- **Commit to learn** if you walk in and out with the same body of knowledge, then maybe you didn't need to be there after all?

Alan Mulally, the former CEO of Ford that helped the company not just survive but thrive during the great recession shared this list in the Spring 2022 edition of Leader to Leader:

Working Together: Principles and Practices

- People first...love 'em up
- Everyone is included
- Compelling vision, comprehensive strategy and relentless implementation
- Clear performance goals

- One plan
- Facts and data
- Everyone knows the plan, the status, and areas that need special attention
- Propose a plan, positive, "find-a-way" attitude
- Respect, listen, help, and appreciate each other
- Emotional resilience trust the process
- Have fun enjoy the journey and each other

#### **Ensure All Voices are Heard**

There are so many things to think about, and so much to do that it may be a bit overwhelming. Rather than trying to do everything, start with one thing, get that established, and then add the next thing that will help you be more effective. And remember that when you are bringing together multiple people that the thing that will ensure you're getting value is to be sure that everyone feels safe to ask questions, to voice concerns, or to suggest improvements. We call this creating a culture of "psychological safety" where people feel that they won't be punished for speaking up. This requires a balance of every voice in the room, so that people in the room who are more assertive and/or vocal give other people space to speak up, introverts feel comfortable speaking up, and the meeting leader is deliberate about including everyone in the conversation.

If we have the right people in the room, the right process for moving forward, and are sure to include everyone to maximize the perspectives, this will drive success. When we do this, we can ensure that the work that we do creates results that are better than we can do individually. This is the bottom-line purpose of scheduling a meeting.

Do meetings have to be like vacuums? No. But just waltzing (or even Roomba-ing) into the conference room without doing any planning is a costly drain on time, resources, morale and overall energy. When we do planning and thinking in advance, we clean up with better results.

