



So You Want to Have A

!?! Meeting !?!

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Have You Been to This Meeting?



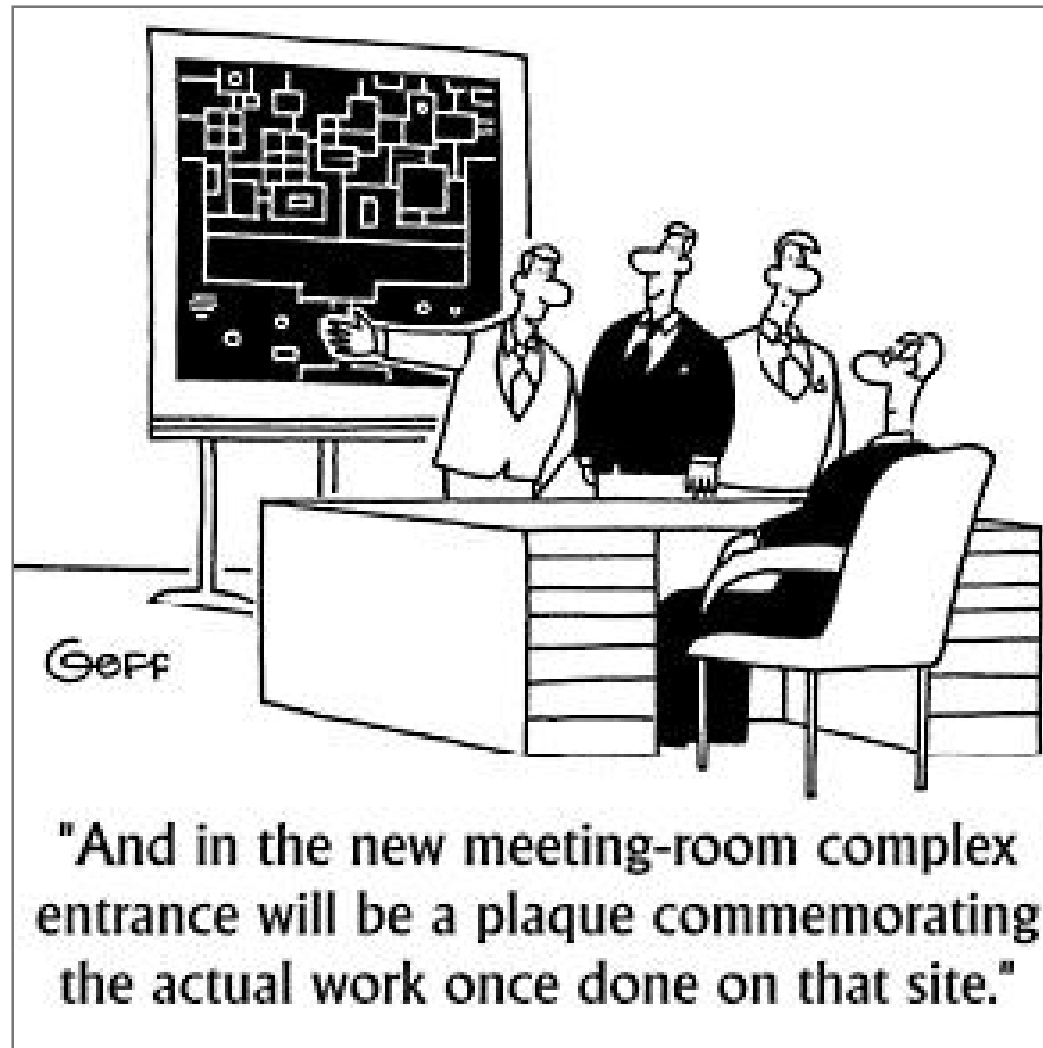
Or This One?



Is This How Your Meetings End?



Do You Need This Plaque?



Why Do We Feel This About Meetings?



The Good and The Bad

Good Meetings...

- ◆ Have a Purpose
- ◆ Accomplish Objectives
- ◆ Keep Time Contracts
- ◆ Are Documented
- ◆ Respect People
- ◆ Are Fun
- ◆ Avoid Combat
- ◆ Encourage Participation
- ◆ Keep to the Agenda
- ◆ Build Teams

Bad Meetings...



How to Have Effective Meetings

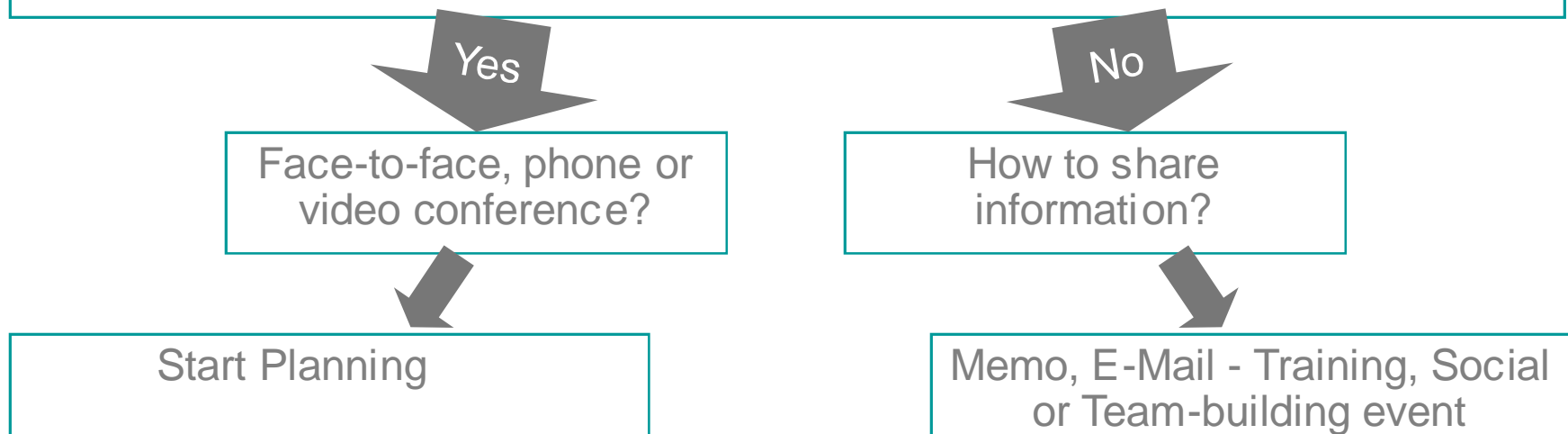
- ◆ Planning
- ◆ Conducting
- ◆ Wrapping-Up
- ◆ Documenting

It's NOT as Hard as You Might Think

Planning - Should We Have a Meeting?

Do We Need Interactive Communication?

- To discuss ideas
- To develop group ownership of a problem and its solution
- To create group commitment to an idea, goal, or project
- To develop agreement or make (group) decisions



Source: Kelsey, Plumb . Great Meetings!

Is A Meeting the Best Way?

Planning – Meeting Outcomes

- ◆ Make a (Group) Decision
- ◆ Exchange Information (for Alignment)
- ◆ Plan Future Work
- ◆ Solve a Problem
- ◆ Gain Agreement (Buy-In)
- ◆ Learn Something New

All Looking for Some Level of Consensus

Planning – General Considerations

- ◆ Meeting Roles
 - Facilitator, Owner, Scribe, Timekeeper, Participant
- ◆ Goals/Expectations
- ◆ Determine Audience
 - Pre-position participants
 - Assess delegates
- ◆ Participant Preparation
- ◆ Meeting Announcement/Agenda
- ◆ Preparation/Setup Time
 - Handouts, Projector, Flip Charts, Seating

Make Responsible Use of People's Time and Energy

Planning - Agenda

- ◆ Provide the Logistics
 - Conference call details if needed
- ◆ Set the Objectives
 - Tell people why they should come
 - And what to prepare
- ◆ Tell the Meeting Plan
 - With a timeline
- ◆ Sample Agenda



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It is the Facilitator's Charter

Planning - The Owner's Role

- ◆ Has a Vested Interest in the Outcome
 - May take action on the outcome
- ◆ Sets Limits or Constraints
- ◆ Provides Background (if needed)
- ◆ Resolves Issues/Disagreements
- ◆ Is Otherwise SILENT
 - Owner is not a content provider

Meetings Serve the Interests of the Owner

Planning - The Participant's Role

- ◆ Be On-Time
- ◆ Be Prepared
 - Understand what the meeting is about
 - Understand why they were invited
- ◆ Listen
- ◆ Contribute . Speak Up
- ◆ Share Ideas and Concerns
- ◆ Act Constructively
- ◆ Make Decisions
- ◆ Observe the Ground Rules

Do Your Participants Know Their Role?

Planning - Meeting Behaviors

Meeting Do's

- ◆ Headline Ideas
- ◆ Be Positive
- ◆ Listen Actively
- ◆ Observe Time Contract
- ◆ Build on Others Ideas
 - How to (H2) phrase
 - I Wish (IW) phrase
- ◆ Stay Focused
- ◆ Stay in Process
- ◆ Help Ideas %Over-the-Wall+
- ◆ No Idea is a Bad Idea
- ◆ Have a %One-Meeting+ Meeting

Facilitator Encourages These

Planning - Meeting Behaviors

Meeting Don'ts

- ◆ Find the %Fatal+Flaw
- ◆ Lob %Grenades+
- ◆ Ramble
- ◆ Have Hidden Agendas
- ◆ Have Side Conversations
- ◆ Conduct Other Business
 - Email, Cell Phones, Pagers

Facilitator Discourages These

Planning - The Scribe's Role

- ◆ Take Notes of the Discussion
- ◆ Scribe/Manage Flip Charts or Other %Brops+
- ◆ Ask Clarifying Questions
 - Does NOT provide content
- ◆ Enforce Ground Rules

Free the Facilitator to Facilitate

Planning - The Timekeeper's Role

- ◆ Enforce the Agenda
 - By communicating to the facilitator
 - Establish ground rules prior to meeting
- ◆ Use Non-Intrusive Methods
 - Hand signals
 - Flash cards
- ◆ Use a Volunteer Participant??

Keep the Facilitator on Track

Planning - The Facilitator's Role

- ◆ Set (and follow) Ground Rules
- ◆ Make Introductions
- ◆ Enforce the Agenda
- ◆ Keep Focus on the Meeting Objectives
- ◆ Keep the Time Contract
- ◆ Ensure Everyone is Heard (That Wants to Be)
 - More difficult with conference calls
- ◆ Capture Decisions/Action Items

Create a Safe Environment

Planning – Effective Facilitator Traits

- ◆ Openness
- ◆ Honesty and Fairness
- ◆ Consistency in Actions
- ◆ Focus
- ◆ Active Listening
- ◆ Accessibility
- ◆ Flexibility
- ◆ Assertiveness
- ◆ Enthusiasm

Source: IAF: Basic Facilitation Skills

Creating a Trust Relationship

Conducting – Ten Facilitation Tips

1. Paraphrase what someone has said so that the participant knows she had been understood and the other participants can hear a concise summary of what has just been said at greater length.
2. Check your understanding against the words of a participant or ask a participant to clarify what she is saying.
3. Compliment participants on interesting or insightful comments.
4. Elaborate on a participant's contribution to the discussion with examples or suggest a new way to view the problem.
5. Energize a discussion by quickening the pace, using humor, or, of necessary, prodding the group for more contributions.
6. Disagree (gently) with a participant's comments to stimulate further discussion.
7. Mediate differences of opinion between participants and relieve any tensions that may be brewing.
8. Pull together ideas, showing their relationship to each other.
9. Change the group process by altering the method of participation or prompting the group to evaluate issues that have been raised during the previous discussion.
10. Summarize (and record, if desired) the major views of the group.

Conducting – Conference Calls

- ◆ Announce Participants
 - Who's in the room; Who's on the phone
- ◆ Set Ground Rules
 - Mute, Don't place on hold
- ◆ Be An Advocate for Those on the Phone
 - Ensure they are heard
 - Summarize discussion/questions
 - Be a traffic cop

Facilitator Role is More Difficult

Conducting – Three Key Skills

- ◆ Listening
- ◆ Questioning
- ◆ Intervening
 - With groups
 - With individuals

Reacting to the Circumstance

Conducting – Listening Skills

- ◆ Passive (Non-Verbal) Listening
 - Good eye contact (as a connection)
 - Body language . relaxed
 - Encouraging responses . without interrupting
- ◆ Active (Verbal) Listening
 - Ask questions
 - Rephrase/summarize for understanding
 - %What I'm hearing is ã +
 - %Tell me more about ã +

Help the Group Participate

Conducting – Questioning Skills

- ◆ Direct Questions . %Did you change the date?+
 - Tend to shut the group down
- ◆ Open-Ended Questions . %What concerns you?+
 - Encourages participation
 - Focus the discussion
- ◆ Clarifying Questions . %How is that different?+
 - Help the speaker communicate
 - Assist others to a common understanding
 - Discover layers of detail

Keep the Group Moving

Conducting – Intervening with Groups

- ◆ Read the Group
 - Try to understand the issue
- ◆ Evaluate Your Perception
 - Is it just your issue?
 - Might need to ask for help
- ◆ Interrupt and Validate with the Group
 - Do they agree with your perception?
- ◆ Make Recommendation
 - How to move forward

Maintain Focus of the Group

Conducting – Hijack Hannah*

You just started reviewing your well planned meeting agenda with the group and Hijack Hannah interrupts to raise a completely different topic that the group should meet on instead. The group seems to agree.

*All names are fictitious and not intended to represent any real person.

What Would You Do?

Conducting – Overwrought Willy*

The meeting is going as planned although there is some tension in the room. As expected the group discussion is identifying a number of issues and differences of opinion. Suddenly Overwrought Willy makes a very assertive statement that no one else in the group agrees with, and the members of the group all start arguing. Everyone is shouting, no one is listening.

*All names are fictitious and not intended to represent any real person.

What Would You Do?

Conducting – Intervening with Individuals

- ◆ Assess the Behavior
- ◆ First Intervention
 - Ignore it and focus on content
 - Interrupt, summarize ground rules
 - Interrupt, own the problem and ask for help
- ◆ Second Intervention
 - Interrupt, address the individual
 - May ask for assistance from the group
- ◆ Third Intervention
 - Speak to person at break
- ◆ Fourth Intervention
 - Confront the individual (last resort)

Act in Best Interests of the Group

Conducting – Meandering Myrtle*

Your brainstorming session is going well and several good ideas have been proposed.

Unfortunately Meandering Myrtle has not quite caught on to the spirit of the meeting and continues to offer long winded speeches on any number of topics, most of which are in no way related to the topic of the meeting.

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What Would You Do?

Conducting – Ivan* Interruptous

Your meeting has a number of topics to discuss and progress has been very slow. No one in the room can complete a sentence without Ivan Interruptous breaking in to offer his point of view.

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What Would You Do?

Conducting – Gossipy Jenny*

The group is discussing your agenda topic with several people contributing their knowledge and ideas. Throughout Gossipy Jenny continues to talk to her neighbor in hushed tones that no one can quite hear. This not only distracts you, but other people in the room as well.

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What Would You Do?

Conducting – Soap Box Annie*

Although you have a well defined agenda and have reiterated it a number of times, Soap Box Annie continues to bring up the same issue over and over again. You can see eyes rolling in the room every time she is about to speak.

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What Would You Do?

Conducting – Sammy* The Shark

You've gathered people together to share information in hopes that the group will become more aware of the larger picture. Sammy the Shark continues to offer only negative comments directed at whoever is speaking and has just told the current speaker "That's the dumbest thing I've ever heard".

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What Would You Do?

Conducting – Out to Get You Otto*

You have been leading the group in a planning exercise to gain a consensus on how to move forward with a complex project. Out to Get You Otto has not been happy throughout the meeting and suddenly directs his anger at you saying “You don’t know what you talking about, I don’t have to listen you, you can’t tell me to do anything”. Silence falls in the room.

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What Would You Do?

Wrapping-Up – Next Steps

- ◆ Summarize Decisions Made
- ◆ Summarize Next Steps Discussed
- ◆ Identify Additional Next Steps

What	Who	When
◆ ◆ ◆ ◆ ◆		

Ensure Everyone Understands

Wrapping-Up – Benefits & Concerns

- ◆ Interactive Review of Meeting
- ◆ Benefits before Concerns

Benefits

- What I liked?
- What went well?
- What did I learn?

Concerns

- What is left to do?
- What was not discussed?
- H2 . How toõ
- IWIK . I wish I knewõ

Summarize Accomplishments & Identify Outstanding Issues

Wrapping-Up – Meeting Minutes

- ◆ Document Decisions
- ◆ Document Next Steps
- ◆ *Summarize* Discussion
 - Key points that led to decisions
 - Context for next steps
- ◆ Publish *Quickly*
- ◆ Sample Meeting Minutes



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Minutes Enforce the Outcome of the Meeting

Key Success Factors for Effective Meetings

- ◆ Be Prepared
- ◆ Help People Participate Constructively
 - Preposition key contributors
 - Enforce ground rules
 - Listen, Question, Intervene (carefully)
- ◆ Be Trustworthy
- ◆ Have Some Fun

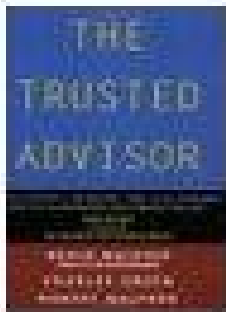
Questions and Answers



References



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- ◆ *The Trusted Advisor* - David H. Maister, Robert Galford, and Charles Green



- ◆ <http://www.iaf-world.org>

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- ◆ *Project Management & Agile Leadership*
 - ◆ *Agile Practices and Value*
 - ◆ *Scrum*
 - ◆ *Facilitation and Coaching*
 - ◆ *Communication*
- ◆ *Requirements Discovery and Management*
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