



# Running Effective Meetings

**‘Best Practices Towards More Effective Meetings’**

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# RUNNING EFFECTIVE MEETINGS

***Effective meetings have clear objectives, with the right attendees contributing and having focused fruitful discussions in as short a period of time as possible.***

## **Issues often Raised About Negative Meeting Cultures**

- Overall Company Productivity gets lost in too many meetings.
- Many meetings have no clear purpose or final output.
- Many silent attendees who may not even be required to be present.
- Conversations that go off-track .
- Suboptimal decision making; Decisions and/or supporting reasons often lost.
- Meetings often start late, go on too long and end late leading to high participant frustration.
- Distracted and uninterested participants leading to unhealthy conformity. Agree to everything to just end the meeting.
- Blaming and complaining without offering any solutions.
- Little alignment of meeting goals with organizational structure and responsibility.

**Can we address these issues holistically? Can we create a more effective meeting culture?**



# RUNNING EFFECTIVE MEETINGS

## There are 8 Types of Meetings

1. Setting and Agreeing on a Company/ Department Goal
1. Making a Decision or Solving a Problem
1. Get Input/ Feedback
1. Generate Ideas or Brainstorming
1. Make a Plan/ Develop a Road Map
1. Create a Shared Understanding/ Education
1. Rally the Troops
1. Update Meetings

***Outside of standard agreed meetings, do not “pile” on another meeting***

- ***If the goal is not clear;***
- ***No time to properly prepare;***
- ***Another method of communication (email; shared google doc; quick conference call etc.) may work***

***Having a meeting should be a last resort.***



# RUNNING EFFECTIVE MEETINGS

## Effective Meeting Practices (1)

Short and frequent beats long and infrequent;

Small Group (rule of 7, absolute max of 10); limit to essential stakeholders:

- Consider some people attending only part of the meeting;
- Conformity and chance of wrong decisions increase with group size;

Starting and ending meeting on time reduces frustrations:

- End meeting on time even if it did not start on time;
- Adjust topics/ discussions at outset to get to the original ending time (we will only cover 2 of the 3 topics we were originally going to discuss) if started late;

Phone off; no stepping out of meeting to address anything.

Guided agenda driven discussions:

- Steer conversations away from expressions of futility and blame (“nothing can be done”);
- Anyone raising a problem must come with a specific viable set of solutions.

Open with meeting purpose and objectives.

Explain what each person present is expected to contribute; “The question we have for you is...” or “Bob we are hoping that you will help guide us towards...”.

Focus on two or three topics in a meeting:

- A topic is anything that can be discussed and decided in less than 20 minutes (if it takes longer 20 minutes, then break it into two different topics or agenda items);
- Ted Talk research has discovered that 18 min is the optimal topic attention span.

Clear pre-designed Agenda with slotted times for each Agenda item

- Keep Returning to the Agenda (make visible)

Lay out key decisions to be made. For each decision, list out pros, cons and other relevant information:

- As part of meeting preparation, get input from relevant parties.



# RUNNING EFFECTIVE MEETINGS

## Effective Meeting Practices (2)

Take a few moments of silence for each person to think about and write down their pros and cons for the decisions to be made.

Open up for guided discussions and “forced” engagement:

- Are these the right decisions that have to be made, or did we miss some critical ones?
- Did we miss any critical pros/cons/information required to make these decisions?
- If you were the sole decision maker, where do you come out and why?
- If you cannot make a decision, what would you need to know to make one?
- Then what would your decision be?

20 minutes maximum per topic; then make decisions supported by reasons.

Close with acknowledging if the meeting accomplished the purpose.

Summarize decision taken, reasons, objections (reasons), next steps, assign tasks, how will the decision be disseminated, be implemented, by whom, on what schedule, how measured.

- Forms the basis of the meeting minutes/ summary

Meeting summary can utilise bullet points and no more than half page per topic/agenda item.

- Must be comprehensible to anyone who did not attend the meeting.
- Minutes should be sent to all no later than 24 hours later.



# RUNNING EFFECTIVE MEETINGS

## What Can Go Wrong: Manage Potential Pitfalls

### Decision Making Meetings

- Insufficient information to make a decision;
- All the right people not in the room;
- Difficulty in coming to closure (discussing the issue vs. the decision);
- The naysayers (“dat can’t work”);
- Sidebar conversations of disagreement.

### Idea Generation/ Brainstorming Meetings

- Getting full participation;
- Broad range of ideas explored vs. coalescing around the first ideas raised;
- Bad summary notes of the ideas discussed;
- Following up and following through to bring the agreed ideas to fruition.

### Information Sharing/ Status Update Meetings

- Keeping participants engaged since they are mostly passive listeners;
- Each attendee needs to see immediate relevance of meeting;
- Ensuring everyone on the same page;
- Sidebar disgruntlement.



# RUNNING EFFECTIVE MEETINGS

## Think Carefully About Limiting Attendees

Importance of meeting attendees

- Mission critical vs. Important to have
  - “Nice to have” should not attend

**DO NOT have the meeting without Key Stakeholder/ Decision Makers!**

What will each attendee contribute:

- Why attendee’s presence is required for Meeting Goal;
- What are the specific questions they need to be asked;
- Any chance they are likely to be silent? No spectators. Need to ensure their opinions solicited.

What will change about Attendee tasks/ to dos after meeting

- Any chance nothing will change for them after meeting
  - Are they really needed?

What if an attendee missed the meeting, what valuable perspective would be lost? Would they need to be called for input before the meeting takes place? What perspective do they have that is needed for the process?

Consider the possibility that someone can attend only a part of the meeting (time bound).

- Why keep them for the entire meeting if only relevant for subset



# RUNNING EFFECTIVE MEETINGS

## Making Preparations

- Do we actually need a meeting?
- Who actually needs to be there?
- Clarifying agenda and objectives
- Decisions to be made very clear
- Complete supporting documentation preparation
- Written so easy to assimilate in the meeting
  - Assume people **won't** pre-read before the meeting
- Quick call/email with the attendees before the meeting so that all their issues with the respect to the discussion can be researched before the meeting
  - Manage stakeholders before the meeting
  - Ask each attendee: What do you think are the most important things that we need to consider to make that decision?
  - Pre-wire attendees for complicated topics and sensitivities (will inform how you drive the discussion)

## In-Meeting Protocols

- Start on time
- End on time (even if you did not start on time)
- Remind people to stay present; best if phone off
- Keep Agenda visible and return to it as often as possible
- Actively Guide the discussion (easy if already spoke to attendees):
  - Here is the decision we have to make
  - Here are the reasons for and against
  - Have we missed anything (actively engage attendees)
- Ask attendees to write down their thoughts (create focus) in silence
- Open the floor for discussion
  - Watch for those who have not spoken and solicit their opinions
- Summarize at the end of each point/decision
- Remove roadblocks to goals and to task completion immediately





# RUNNING EFFECTIVE MEETINGS

## In-Meeting Protocols (continued)

- Note off track conversations and take them offline
  - Be clear where and when the issue will be addressed
  - “John, you raised some valuable points but we won’t address them here today. Let us get together next week to discuss.”
- Summarize at the end of the meeting the things that have been agreed and the follow up action items.

## End of Meeting Wrap Up

***Clear Closure is the way to create a Successful Meeting with Real Impact***

Announce meeting coming to an end in 15 minutes

- Out of time; guess we will end here; we are done

Be explicit about topics not addressed

- Agree time to follow up

Summarize decisions taken

- Reasons for decisions

Ensure clarity of next steps

- Action items/Output
- Timeline
- Responsible person; firm commitment

Positive ending

- Thank a few specific people by name for specific things they did
- Clear/Concise Preparation; high quality comments; being positive throughout



# RUNNING EFFECTIVE MEETINGS

## Post Meeting

- Distribute meeting summary/ minutes within 24 hours
- Reiterate action items and people responsible
  - Have individuals explicitly confirm their deliverables in the group email
- Delegate an individual to follow up on all action items/ deliverables
  - Make it their job to keep the group informed about action item progress
- Post meeting momentum is critical
  - Within a week, action items need to have begun and keep making progress on a weekly basis

## Standardized Meeting Summary (must go within 24 hours)

### Each Decision a Stand Alone Sheet?

- Date, Start Time/ End Time, Attendees
- Decisions Taken (one or two sentences per decision)
- Reasons that would have gone against the decision that were considered, discussed and then discarded and why
- Next Steps and implementation Timeline
- Who does What and by When
  - Action Items
- Who is tracking progress along implementation timeline
- Implementation metrics (if needed)
  - Monitor, Reports, To Whom
- Who needs to be informed about What, by When and by Whom
- Note on dissenters and reasons for dissent
- Decisions NOT taken with reasons these decisions not taken now:
  - Ran out of time
  - Not enough information
  - All the right people not in the room
- Next steps required to get to the decisions not taken
- Time agreed to reconvene to take the decisions not taken



# RUNNING EFFECTIVE MEETINGS

## **Running an Effective Information Sharing or Status Update Meeting, (Create a Shared Understanding/ Rally the Troops)**

Attendees are largely passive listeners so meetings need to be as short as possible.

Best if the presentation presumes that the attendees know “nothing” about the issue:

- Language needs to be accessible to each audience member

Tone of presentation would be different if the goal is to:

- Persuade
- Educate
- Excite/Create Enthusiasm

The First set of these slides should outline why everyone needs to hear the message and be at this meeting.

Last set of slides must outline how each function/job changes because of the information.

Open floor for questions and asking if any other implications were missed.



# RUNNING EFFECTIVE MEETINGS

## Running an Effective Idea Generating Meeting: Brainstorming Sessions (1)

- People most creative on their own vs. in a group, which often leads to coalescing around the first set of ideas expressed.
- Circulate the list of topics before the meeting and ask people to come with their written ideas (especially important for introverts).
- Ask attendees to throw out any preconceived notions.
- Give attendees any limits/constraints on the idea if any (e.g. It can't cost more than \$1m; must be able to do it with the current team; must be accomplishable within 1 month.)
- Start the meeting by going around the room and asking each person to give the one sentence/phrase description of each idea they have;
  - Write on board for all to see under the names of people who had the idea
  - Ask clarifying questions only
  - Where there is overlapping ideas, write separately under each person name
- Ask everyone after the first pass is up *“are there any other ideas that occurred to anyone while they were listening that are not on the board”*
  - Add them

Number each idea on the board

- This becomes the full set of what will be discussed



# RUNNING EFFECTIVE MEETINGS

## Running an Effective Idea Generating Meeting: Brainstorming Sessions (2)

- Outline/Agree on the set of filters or criteria that will be used to reduce the number of ideas on the board if needed.
- Remove the ideas that do not pass the filter.
- From the remaining list, go around the room and have each person explain their idea in more detail.
- Once idea explained, allow open discussion about pros and cons of each idea (10/15 minutes).
- At the end of the meeting get a sense from the room which of the ideas have:
  - Enthusiastic support; lukewarm support; or not much support at all
  - Create a final list of ideas (remember that several ideas can be combined into one idea)

Agree which ideas will be:

- Implemented without further discussion
- Researched Further
- Discarded



# RUNNING EFFECTIVE MEETINGS

## Addressing Behavioural Challenges (1)

BEHAVIORAL CHALLENGES	POTENTIAL SOLUTIONS (CALL IT)
<p>Not asking questions for fear of looking silly and therefore not being able to fully participate in the meeting</p>	<p>Facilitator asks each person by name some key questions:</p> <ul style="list-style-type: none"> <li>• What are we missing?</li> <li>• What is your biggest concern?</li> <li>• How could we make this better?</li> </ul>
<p>Holding each other accountable</p>	<ul style="list-style-type: none"> <li>• Did we all deliver what we said we would?</li> <li>• What is holding up the process now?</li> <li>• What should we ensure that each person does?</li> </ul>
<p>Ensuring that the right attendees in the room and trusting that the decision made is the optimal one under the circumstances</p>	<ul style="list-style-type: none"> <li>• Clarify why each person is attending (Make Explicit)</li> <li>• Ensure key decision makers</li> <li>• Ensure key information holders</li> </ul>
<p>Indecision and/or keep Revisiting closed decisions</p>	<ul style="list-style-type: none"> <li>• Decision Summary Sheet stamped with <b>Decision Closed</b></li> </ul>
<p>When faced with uncertainty, undermining the whole process or questioning the data instead of naming your discomfort</p>	<ul style="list-style-type: none"> <li>• What exactly is bothering you?</li> <li>• How best to address? Suggestions:</li> <li>• What would get you comfortable with the decision?</li> </ul>



# RUNNING EFFECTIVE MEETINGS

## Addressing Behavioural Challenges (2)

BEHAVIORAL CHALLENGES	POTENTIAL SOLUTIONS (CALL IT)
<p>Passive aggressive resistance when things “don’t go my way”</p>	<ul style="list-style-type: none"> <li>• Sensing discomfort. What are you not saying?</li> <li>• State your concerns</li> <li>• Insist on getting an answer</li> </ul>
<p>Going off on a tangent that is not essential to the meeting objectives</p>	<ul style="list-style-type: none"> <li>• Hold on. This is not for this meeting. Off topic</li> <li>• Write it down on board</li> <li>• Write down where and when it will be addressed</li> </ul>
<p>Meeting goes way off track</p>	<ul style="list-style-type: none"> <li>• Take a pause; Note it and refocus the meeting</li> <li>• If it cannot be refocused, end it</li> </ul>
<p>Not respecting other people’s time by arriving late or allowing the meeting to go much longer than originally agreed</p>	<ul style="list-style-type: none"> <li>• At end of meeting, remind everyone of the start time, and that it needs to be respected</li> <li>• Keep track of all late comers over 15 minutes late</li> <li>• Once a month publish list of most egregious performers</li> </ul>
<p>Nothing moves after the meeting; dying momentum; Breakdown between meeting and actions/impact</p>	<ul style="list-style-type: none"> <li>• Ensure those who commit can actually deliver</li> <li>• Assign an Implementation Progress Tracker who informs the entire group of everyone’s progress</li> </ul>



# RUNNING EFFECTIVE MEETINGS

## MEETING CHEAT SHEET

### **Pre-Meeting**

- Do we really need a meeting?
- Who actually needs to be there?
- Clear Agenda created and circulated.
- One on one calls to attendees to determine individual biases, concerns and pain points so they can be addressed in the meeting.
- Complete supporting documents.

### **Start of Meeting**

- Outline clear meeting purpose; layout key decisions to be made.
- Outline why each person is there; what they expected to contribute.
- Go through Agenda and slotted times.

### **During Meeting**

- Ensure full participation.
- Allow for silence and reflection.
- Wrap up each module as you go (So we have agreed that XYZ...)
- Each topic/module or agenda item should be max 20 minutes.
- Periodically ask “are we missing anything?” or “any objections?”
- Gently shut down off track conversations, note it and tell people where it will be addressed later.

### **End of Meeting**

- Summarize decisions taken, reasons and next steps.
- Outline key responsibilities.

### **Post Meeting**

- Meeting summary/minutes with decisions agreed, reasons, next steps and responsibilities:
  - Must be comprehensible to someone who did not attend the meeting.





# Resources

## **Althea Walters**

- CEO, Blazing Beyond
- Email: [althea@beyondbananas.net](mailto:althea@beyondbananas.net)
- Tel: 876-579-5384

## **Lauri-Ann Ainsworth**

- CEO, Branson Centre of Entrepreneurship-Caribbean
- Email: [lauri.ainsworth@bransoncentre.co](mailto:lauri.ainsworth@bransoncentre.co)

## **Running an Effective Meeting & Making Consensus Decisions**

- <https://shawano.extension.wisc.edu/files/2015/10/lsc-running-an-effective-meeting-meetings-decisions-jsm-10062009-1.pdf>

## **Want a better decision? Plan a better meeting**

- <https://www.mckinsey.com/business-functions/organization/our-insights/want-a-better-decision-plan-a-better-meeting>

## **The Most Productive Meetings Have Fewer Than 8 People**

- <https://hbr.org/2018/06/the-most-productive-meetings-have-fewer-than-8-people>

## **5 Ways to Lead a Meeting: Make 30 Decisions in 30 Minutes**

- <https://www.forbes.com/sites/glennllopis/2012/12/17/5-ways-to-lead-a-meeting-make-30-decisions-in-30-minutes/?sh=5583ebd67882>

## **The Complete 8-Step Guide To Conducting An Effective Virtual Meeting In 2021 [With Checklist]**

- <https://snacknation.com/blog/effective-virtual-meetings/>



# Resources

## Virtual Strategic Planning Sessions: 7 Tips for a Great Strategic Planning Session

- <https://www.rhythmsystems.com/blog/7-tips-for-a-great-virtual-quarterly-planning-session>

## How to Run Decision Making Meetings

- <http://meetingsift.com/decision-making-meetings/>

## 9 best practices for engagement in virtual meetings

- <https://www.nten.org/article/9-best-practices-engagement-virtual-meetings/>

## 7 Powerful Tips for Highly Productive Online Meetings

- <https://www.business.com/articles/7-powerful-tips-for-highly-productive-online-meetings/>

## 10 effective brainstorming techniques for teams

- <https://www.wework.com/ideas/worklife/effective-brainstorming-techniques>

## A Checklist for Planning Your Next Big Meeting

- <https://hbr.org/2015/03/a-checklist-for-planning-your-next-big-meeting>

## 6 Most Common Types of Business Meetings

- <https://www.lifesize.com/en/video-conferencing-blog/types-of-business-meetings>

## How To Run a Meeting

- [https://hbr.org/1976/03/how-to-run-a-meeting?cm\\_sp=Article-\\_-Links-\\_-Comment](https://hbr.org/1976/03/how-to-run-a-meeting?cm_sp=Article-_-Links-_-Comment)

## How to Design an Agenda for an Effective Meeting

- <https://hbr.org/2015/03/how-to-design-an-agenda-for-an-effective-meeting>