

A Step-by-Step Guide to Structuring Better Meetings

by Liane Davey

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I am frequently flummoxed by the complete misalignment between a team's mandate and the agenda for their meetings. My favorite example was a Corporate Affairs team that had an ambitious agenda to work collaboratively to transform the perception of the organization among members of the public, the regulator, and three levels of government. Yet they had only allocated 30 minutes per week to the task!

They aren't the only ones. Inevitably, teams fail to link the structure (i.e., content, frequency, and duration) of their meetings with the job that needs to be accomplished in those meetings. A one-size-fits-all team meeting rarely works.

There are a few simple steps that will help you build a better meeting structure. I'll use the example of a leadership team of a manufacturing plant to demonstrate the process.

First, define the work of the team. Exclude topics where one person has clear accountability and can proceed without input. Instead, focus on the items where the team's input will change the trajectory of the work. The manufacturing leadership team would emphasize issues that cut across the plant and parse out topics that can be addressed by individuals or subgroups of the team.

Second, parse the items into different categories so meetings can be tailored to the content. Meetings become ineffective when they combine different types of discussions, because we aren't good at changing the pace or tenor of a conversation once it starts. Make things easier by splitting discussions into categories. The manufacturing team could split operational discussions about issues on a line or scrap rate concerns from discussions about progress on the introduction of a new line.

Third, determine the frequency with which you need to discuss each category. The short time horizon topics (e.g., revising projections for the coming month) need to happen frequently. Less urgent topics can be discussed less frequently. In a manufacturing operation, that operations meeting might even be a daily huddle, whereas the big projects could be discussed bi-weekly or monthly.

Fourth, set the length of the different meetings. Each type of meeting needs a very different feel. A regular operational meeting needs to be crisp and therefore as short as possible. Strategic meetings need more time because the topics require space for people to explore and dissent. The manufacturing team could start the morning with a 30-minute huddle and reserve a half-day for more substantive bi-weekly meetings.

Fifth, plan for overflow. If I could choose one meeting effectiveness tip that would make almost all teams more efficient it would be to schedule a regular overflow spot on the calendar. Having a receptacle for the overflow prevents cramming at the end of meetings and also reduces the likelihood that people's time will be wasted on issues requiring only a small subset of the team. Those items naturally move to the overflow spot when needed.

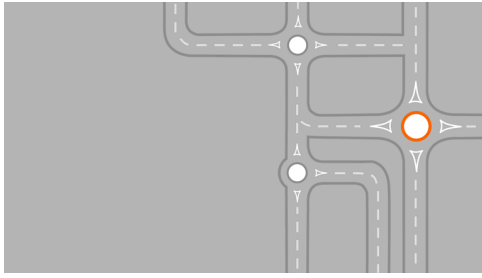
Breaking out of the one-size-fits-all approach is the secret of effective meetings. The result should be a set of meetings tailored to the mandate of your team and differentiated in frequency and duration to suit the content. That will go a long way toward setting your meetings up for success.

For most leadership teams, a weekly operational meeting, a monthly business builder meeting, and a quarterly strategic directions meeting works well. Let's look at each of those in greater detail:

Effective operational meetings

There is a significant amount of information to process to keep a department running smoothly (e.g., emerging issues in service delivery or trade-offs in resource planning). These topics are time-sensitive and require a forum where they can be efficiently raised, discussed, and resolved. That's what the operational meeting is all about.

Meetings



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Be very clear about the objectives of your operational meeting and don't let other topics on the agenda. The meeting is to provide team members with up-to-date information to run their own departments effectively, to identify and gain diverse perspectives on emerging cross-departmental issues, to align around action plans, and to create clear accountability for action. Nothing else.

Start the meeting with an introduction from the team leader that provides context, including any direction from above. Next, include a roundtable on emerging issues and priorities. During the roundtable, chart the issues that need team discussion. When you're done with the roundtable, quickly prioritize the issues that were raised and use the prioritized list as the agenda for the remainder of the meeting. Work through the issues and agree on the action plan.

Set a timer and stop when 10% of the time remains. Use the remaining time to review the action items, set the agenda for the weekly overflow meeting, and get aligned on communication messages. The discipline at the end of your meetings will support better execution.

Business builder meetings

On a regular basis, your team needs to pull out of the operational detail of working *in* the business and spend some time working *on* the business. The objectives of a business builder meeting are to identify opportunities to increase the capability or capacity of the

team, to address any barriers to successful execution, and to monitor progress and course correct on ongoing projects. In the manufacturing example, this is the ideal place to talk about the introduction of a new line or the adoption of a quality management system.

Unlike the ad hoc operational meeting, the secret to having a highly productive business builder meeting is to be prepared. First, create an agenda with the topics, owners, and the required value add (e.g., identify issues, develop solutions, make decision, etc.) I highly recommend that you assign one team member to be the sponsor for each agenda item. Make the sponsor accountable for the quality of the discussion, including getting the facts and information required to support an effective discussion distributed in advance.

Start the agenda with a roundtable. In contrast to the discussion in the operational meeting, use this roundtable to highlight mid- and longer-term priorities, opportunities, and concerns. After the roundtable, review ongoing projects, stopping only on issues where the team needs to weigh in. Next, devote time to the enabling functions. This is the appropriate home when Human Resources wants to do a talent review or when finance wants to share a new budget process. Make the sponsor accountable for the value of these discussions.

Once those topics are addressed, the remaining time should be devoted to issues that your team needs to discuss to enhance the efficiency or effectiveness of the department. Topics might include: how do we evolve the forecasting process to improve accuracy; what can be done to improve scrap rates; or how do we reduce lost-time on the line? This section is the guts of the business builder meeting as the team brings its full value on how to make the organization stronger. Again, wrap up with a review of next steps and communication messages.

Strategic directions meetings

Between two and six times per year, your leadership team needs to lift your eyes to the horizon and re-evaluate your strategy. This should be a lengthy meeting that provides ample time to meander. In my experience, one strategic directions day per quarter works well. I often pair this day with one on team effectiveness, which makes a productive two-day offsite.

This meeting should have a very different feel from the operations meetings (where you're managing the operations) or the business builder meeting (where you're improving the operations). The strategic directions meeting is more about where you're going and less about your progress in getting there. The manufacturing leadership team might consider important questions about how to optimize capacity and how to trade off efficiency and flexibility.

The objectives of your strategic directions meetings should be to highlight changes in the external environment and their potential impact on your organization, to monitor longer-term performance indicators and proactively identify issues and opportunities, to generate new insights about how to achieve your vision and/or goals, and to initiate further investigation.

As with the business builder meeting, it's critical to prepare so that the time in the meeting is focused on high value discussions. In contrast to the business builder meeting, the strategic meeting is less about decisions and actions and more about expanding the team's thinking. To that end, pre-reads should be thought provoking, often emphasizing information from external sources or internal metrics that aren't examined frequently.

Where possible, start the meeting by blowing people's minds. Find something fascinating, inspiring, or perspective altering that will shake them up and change the tone of the conversation. Once

everyone is sitting up and paying attention, solicit different perspectives on what's going on in the outside world. Only then should you turn your attention to your own business. Start with leading indicators of the business' health. Have your margins been declining? Is your supply chain performance worrisome? How well are you driving organic growth? Ultimately, you're trying to determine whether your current trajectory is sustainable and whether it's steep enough.

Distill the internal and external information into a short list of imperatives for your business and then identify the work that would need to be done to make meaningful progress on each imperative. The idea is not to build a full-fledged plan in the room (you don't have the information you need). You just want to generate ideas, define them, and identify a champion to do further research and come back to you with a recommendation. You will likely generate many more ideas than you can reasonably execute, so be sure to winnow the initial list down before leaving the room. Again, close by summarizing the action items, owners, and follow-up plan.

The communication out of the strategic directions meeting is particularly important (and often high impact), so get aligned on what is ready to be shared and what isn't and then come up with a plan for how you'll get the message out.

Most people bemoan the number of meetings on their calendars. You would be justified in worrying that introducing new meetings might start a revolt. But what people are tired of is bad meetings: boring, circular, unproductive meetings. They long for valuable discussions that move the business forward. You'll greatly improve your discussions by tailoring your meetings so that their objectives are aligned with the content, frequency, and duration of your meetings.

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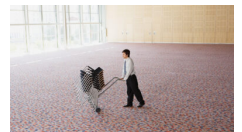
Liane Davey is a team effectiveness advisor and professional speaker. She is the author of *The Good Fight, You First*, and co-author of *Leadership Solutions*. Share your comments and questions with her on Twitter at @LianeDavey.

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