HOW TO HAVE BETTER MEETINGS GUIDE

Meetings are to business leaders what operating rooms are to surgeons or playing fields are to athletes. They are at the heart of what business leaders do, yet most of us don't like them and few of us have been trained to lead and facilitate them.

We believe great meetings are essential to our business. Really good meetings do more than get things done; they express our values, create culture and clarity, save time, and contribute to our enjoyment in work.

This training is designed to give you structures to help you lead and participate in meetings. This is a generic outline and will need to be tailored to fit your context.

MEETING PRINCIPLES

#1 Set a Positive Emotional Climate

Business meetings are notorious for focusing on problems. That's often the only reason we meet, to try and fix problems. The negative focus often raises anxiety and stress. Good leaders focus on creating a respectful and positive emotional climate. They ensure that conflict can surface in constructive ways, and learn to model honest and respectful conversations. They also know it's ok to have fun and still get work done in a timely manner. They realize that lower anxiety produces better relationships and results.

#2 Learn to Sense and Name Tensions

#3 Understand the Limit of Time

Time is the one thing we can't ever get more of. That means, developing awareness of time, economy of thought and words are crucial skills to cultivate. It also means starting on time, and ending on time as often as possible.

#4 Match the Container and the Content

To avoid meeting stew, where all things mush together, we focus on creating clarity around different kinds of meetings. Great meetings happen when we match the container with the content. Knowing where to put what is crucial. To keep it simple we have identified 3 meeting types, others may be added:

1. ***Weekly Tactical Meeting – (i.e. Department/direct reports meeting)***
   a. Lasts between 45-90 minutes
   b. Focus on tactical and operational issues with near term goals related to getting business done in the next two weeks.

2. ***Strategic Meeting (as needed)***
   a. Allow 1 to 2 hours per topic, typically no more than 2-3 topics
   b. Discuss, analyze, brainstorm, critical issues affecting long-term success. Focus on issues impacting a 6 month to 1-year time frame.
   c. Participants should do proper research in advance.

3. ***Off-Site Strategic Meeting (as needed)***
   a. Out of the office 1 to 2 days
   b. Review strategy, industry trends, key personnel, team development, etc. Focused on issues impacting the business in the next 1 to 3 years.
   c. Don't over structure or overburden the schedule

THE WEEKLY TACTICAL MEETING

Key Elements:

- Strategic Parking Lot:
  This allows the leader or anyone to capture and bracket interesting and important topics for a more appropriate forum. Anything that has larger implications, requires more research, focuses on long-term issues, or structural matters. These items should be written down to help build the agenda for later Strategic Meetings.

- Monkeys:
  A "Monkey" is a next step or action item that needs to be followed up on outside the weekly meeting. It's the "monkey on your back" until the task is done. It could be more research, another meeting with key stakeholders, or the development of a recommendation. Monkeys help focus on the most essential conversations. Everyone should be on the look out to identify these.

- Tensions & Solutions*:*
  A tension is the perceived gap between what is and what could be. Tensions are neither positive or negative, only neutral. But like the tension in a stretched rubber band it is full of potential. Creative solutions are generated by the tensions we sense in the organization. We get to stay curious about what's possible. This is how we unleash the potential to propel the organization forward. Meetings are the place that sensed tensions are identified and processed.

Key Roles:
Good meetings should have clearly defined roles with shared expectations for each one. The two key roles for each meeting include:

1. Leader:
   a. Should have organizational authority
   b. Calls the meeting, facilitates, and guides the agenda
   c. Establishes time parameters for each item
   d. Searches for clarity, priority, and facilitates respectful conflict

2. Monkey Handler:
   a. The "Handler" is the one responsible for recording "monkeys" or creating calendar events during the meeting for follow up.
   b. They record:
      i. What needs to be done
      ii. Who is involved
      iii. When it's due

3. Time Keeper:
   a. The Leader sets time limits for a particular agenda item and the Time Keeper sets a timer
   b. The Time Keeper alerts the Leader when time is up (use of nurf gun, mascot, ball, notification card, raised hand, etc.)
   c. They are not there to judge whether what others are saying is valuable. Everyone must understand this. This role is like the speedometer in your car, it merely creates awareness, not judgment. Time limits apply to everyone in the room including the leader.
   d. Once the time limit is reached, the speaker can close out their comments or request more time from the leader. It is always the leader's

prerogative to decline or grant the request. If the leader grants more time, they will inform the time keeper of how much more time is allotted.

Basic Agenda

1. ***Check In:***

   Goal: Center the work in our values and start the meeting with a positive focus

   - Option 1: Values Check In - Each member of the meeting is invited to express appreciation for how one of the values is being expressed by another person in some way.
   - Option 2: Individual Values Recognition - The leader selects an individual to recognize the way they live out a particular value.
   - Option 3: General Appreciation – Each member is invited to share something they appreciate preferably about the business. It could be a person, a success, or anything else that seems to be working well.

2. ***Monkey Handler:***

   Goal: Bring transparency and accountability to Monkeys

   - Monkey Handler reads off any relevant Monkey's from the previous meeting whose due date is past. Participants respond "check" or "no check" to each.

3. ***Lightening Round*:**

   Goal: Build a picture of current reality, report updates to key projects by using Scorecards and identifying Priorities

   - Each role assigned a metric reports on it briefly, highlighting the latest data. Or top priorities for the week are highlighted.
   - The facilitator reads each project and asks: "any updates?" The project's owner either responds "no updates" or shares what has changed since the last meeting. Questions allowed but no discussion.

4. ***Agenda Building and Triage:***

   Goal: Build an agenda with placeholder headlines written down for all to see and get through all the items in the allotted time.

   - Here the leader and participants are asked to name the tensions or issues that need to be processed in this meeting; one or two words per item, no discussion. The leader may have their own list in advance of the meeting.
   - Once the agenda is built, discussion of each item follows. Team members are on the lookout for Monkey's and/or items for the Strategic Parking Lot that may not belong in this meeting.

5. ***Like Best/Next Time***

Goal: In the spirit of "continual learning," harvest learning from the meeting.

- Each person can share a closing reflection about the meeting; Here you are naming what you liked best about the meeting, or what you'd like to see different next time. Use an "active pass" for those who don't have anything to share. This simply means you say "pass" rather than remain silent.

TROUBLESHOOTING MEETINGS

When a particular owner of an agenda item can't seem to find closure on an issue:

- Leader asks the owner "What do you need?" This is a respectful question that helps focus the owner on what matters most to them on this issue.
- Agenda item owner engages others as needed
- Capture any next actions or projects requested and accepted.
- Leader asks owner "did you get what you need?" This ensures it closes the item in a manner that honors the person's role and responsibility.

When meetings struggle to create a coherent and clear picture of reality

- Add Scorecard Captain Role: One who identifies, manages, and ensures scorecards, dashboards, or schedules are designed well and regularly updated by each team.

During Off-Site, Strategy or longer meetings that drag, consider adding

- Energy Captain Role:
  The person responsible for identifying who will add energy to a room at key moments of a meeting. They plan for an exercise or activity that increases energy. (i.e. one-minute game of Simon Says, dance party, team building, etc.)
- Learning Captain Role:
  The person responsible for identifying who will bring new content, training, or information related to personal or professional development (could be about wellness, or time management tricks, etc.)