



# Effective Meetings: Get Out Of Jail!

How do you feel about most of the meetings you attend? Are they productive, or generally considered a waste of time? Do you attend too many meetings? How do others value the meetings **you** run? If you are like most managers we know, your experience in running and participating in meetings is less than ideal.

Today's show is the first of 2 or 3 shows to focus on running effective meetings. If you follow the guidelines we present here, your meeting will be much more effective, you'll have less of them, and your individual and organizational performance will soar. And, it's not hard! A detailed outline of the podcast is located here. In addition, we've also provided you a Meeting Agenda Template that implements the guidelines we've discussed on today's show.

We've all sat in on meetings that are not terribly effective, seem like a waste of time, and you wish you were anywhere else than this jail of a meeting. People use their BlackBerries under the desk playing Tetris, sending email, or responding to an SMS. In teleconferences, everyone has their phone on mute; when someone isn't on mute, you can hear the instant message chimes sounding in the background. People come late; people leave early. The meeting is supposed to go an hour, but it runs an hour and a half so you're late to the next meeting. People don't contribute; others turn the meeting into a soapbox. The purpose of the meeting is not clear, nothing gets done, and nobody can even figure out if you achieved what you were supposed to have achieved. And then there are just too many meetings. Partially, this is because we didn't get done what we needed to get done the first meeting, and so we have another meeting.

## Effective Manager Conference

Everything you need to know to implement One On Ones, Feedback, Coaching, and Delegation. And all your questions answered.

When you have such low expectations going in to the meeting, your willingness to contribute and participate just goes through the bottom. And we never improve. So we joke about today's information being your get out of jail free card.

Meetings are important, so we're going to have them. Let's do them right.

There are ten things that you need to do. We also have slides of this information on the website.

## Outline

1. Pre-Publish An Agenda
2. Start On Time
3. Set Some Ground Rules
4. Stick To Your Agenda
5. Use A Parking Lot
6. Fix Responsibilities
7. Finish On Time
8. Publish Notes
9. Continuously Improve
10. Use A Facilitator

## Shownotes

### 1. Pre-Publish An Agenda.

Here's the mistake people make in agendas, most people's agenda have two columns - Item and Owner. That is NOT an agenda. An list that says we're going to talk about four things is not an agenda.

**An agenda has items and a time associated with them.** What people tend to do next is to put an item and duration, which is a mistake as well. So let's walk through what are the basic things to put on an agenda. The sample agenda on our website makes it easy for you.

- An agenda is always **one page** long for business meetings that last an hour or 90 minutes at most.
- **Information Given at the Top of the Page**

- 1. The Meeting Name.** If it's not a standing meeting, like weekly one-on-one or monthly update, it can be simple as something like Decision on Project X.
  - 2. Start and Stop Time.** The meeting starts at 9 am and ends at 10 am. Simple.
  - 3. Location.** If you need to put directions on there, great. All too often we leave the location off, and then somebody's coming from somewhere else and they don't know where the Conference Room is, or they don't know where the meeting is because you didn't put a location down.
  - 4. Leader.** Who's running the meeting, and if you use a facilitator, which we recommend, then you've put the facilitator down as well.
  - 5. Attendees.** This way everybody knows who else is coming. Sometimes people don't know why they're attending the meetings, but if they see who's coming they can say "Oh, well we're working on some projects together, that should be a good one for me to go to because I see their names on it as well."
- **Each Agenda Item.** There are three key pieces of information for each item.
    - 1. Start Time.** By putting the start time, everyone can easily know if the meeting is running on time. When you list duration for each item, everyone is busy calculating where they are in the meeting. You should be able to look at your agenda and the clock, and you should know exactly where you are in the meeting. **So give the expected start time.** The next stop time for each item is the next item's start time.
    - 2. Item.** This is what you're going to do, discuss, decide, brief.
    - 3. Owner.** This is the person who is responsible for the agenda item. At some meetings, every item could have the same owner. At some point you'll be able to delegate more and people on your team will have ownership of particular items.

Handing out copies of the agenda at the meeting is the best way to make sure the meetings will take more time. When this happens, nobody's prepared for the agenda. Start sending the agenda out in advance and your meetings will finish on time. If it's a standing meeting and it's the same agenda every time, you can send it out a day or two before, or even a couple of hours before.

There are some meetings that you don't need to have an agenda published. An example is the stand-up morning meeting with your admin. But, you should have a standing deal that it's 15 minutes long - 5 minutes to go over the calendar, 5 minutes for big issues that you may need help with, and 5 minutes for what your assistant may need help from you with. This doesn't need to be published in advance because it's simple, short, and only has two people.

## 2. Start On Time.

EXACTLY on time. If people are coming late to meetings, all you need to do to fix that is to start on time, regardless of who is present. Close the meeting when nobody's there after 10 minutes. They'll get the message and at the next meeting, they will be on time. If you're trying to implement some new behaviors within this organization, let all of the attendees know that you're going to start the meeting on time.

In order to start on time, you have to be a few minutes early. You can't walk in at two o'clock and say, "Hey guys, ok let me just rearrange my stuff here. Give me just a minute." That's inappropriate. There are 6-10 people who work for you, and they're going to sit there and watch you shuffle papers. And when the clock says two o'clock you look up and you say, "We're starting."

- **What if someone important is not there?** You let it go and start on time. If the person owning an agenda item isn't present, skip that item and move on. Then, you give feedback to the person who was late or didn't come. You say, "When you don't come to meetings, here's what happens: We miss stuff that you need to report on, I would really like to hear from you, we waste a lot of the team's time."

All you really have to do is three or four meetings that you run, start them precisely on time. And everybody who works around you will start showing up on time. It will also point out those people who don't get the culture that you want to be respectful of their time. One of the reasons you start on time is so you're respectful of everybody's time, not just yours. It will make it clear who's late because they want to be late. Every adult in a corporation knows when and where they need to be, and they're choosing to be somewhere else. They may be with a customer, they may choose to be late and that's fine, we're not going to chastise them if they make an intelligent decision, but if they're

just at their desk working on something, and "Oh, I forgot", after three or four meetings we want to give him some feedback: "Hey, when you're not on time, it affects team performance, because we're all in a meeting."

Never, ever, ever wait. Even if there's one other person in the room. You just say, "Well, we're going to start. We know they're smart people, we care about them, we're going to start and do the best we can."

- **What do you do about latecomers?** Let's say you've got 10 people in a meeting, and seven of them are there, and three of them stream in 15 minutes late. Our recommendation is to ignore them. We don't point them out, we don't try to make them feel bad, because that's not really feedback, that's just embarrassment and management is not about embarrassment. If they're late, assume that they have a good reason for being late. If they set up a pattern, give them some feedback about their pattern. Basically you don't want to focus on them, you want to focus on the work.
- **What about the co-chair of the meeting or the boss who says, "Why don't you catch me up?"** Ask them if you can catch them up after the meeting or during the break. They will probably appreciate the respect you're showing the other people in the room. And the vast majority of your bosses are not arrogant enough to think that time ought to stop for them.

There are some who insist to be caught up. In that situation, you can say, "Bob, if you can hold on just a moment, let's get through this item, then we'll do a quick update for you." But don't start your meeting late because you're waiting on your boss.

### 3. Set Some Ground Rules.

The ground rules for your weekly meeting should generally be the same all the time. They should be as simple as some of the topics we're covering here: send an agenda in advance, finish on time, stick to your agenda, use a parking lot, use a facilitator. Another great rule is the one-at-a-time rule - when somebody else is talking, you get to be quiet. Another important one is no cell phones, BlackBerries, pagers, etc. Or at least have them put on vibrate so they don't disturb the meeting.

The facilitator enforces these ground rules. In enforcing the rules, you don't want to

embarrass anyone breaking them, but we want to remind them of the rules. A great way to do this is to have the rules posted in the room where everyone can see.

The ground rules are things we are going to hold ourselves against to see how well we met. They are, in fact, the cultural change you're trying to instill in your organization, the protocol for conducting meetings. Being very clear about them at the beginning can help avoid some difficult situations.

#### **4. Stick To Your Agenda.**

It's one thing to have an agenda and it's another thing to use it. It's actually really easy to stick to the agenda; it's just really hard to introduce conflict. The classic example is a 10-minute agenda item that you're 21 minutes into, and you still haven't cut it off. Conflict is inevitable. You should embrace conflict. It's not always Kumbaya, all the time.

It's as simple as this: You want to stick to the agenda. At 8:20 when the 8:10 agenda item is supposed to be done, you say "Ok, it's 8:20, we're supposed to move on to the next agenda item, we can finish this in one minute and I'll give us a minute, or we can just stop right here and move on to the next agenda item." That's all you have to do, and sometimes it's the boss saying "We're going to take one more minute to make a decision," or "Bob you have one more minute to wrap up," or "Terry, I'm sorry I can only give you one more minute to move on." Another option is to create an action to gather more information so you can resolve the issue in a subsequent meeting.

The way you stay on time is to have the leader or the facilitator move on to the next item. When an item is scheduled to end in two minutes, tell the item owner "You have two minutes left." If someone runs over, you tell them it's time to move on. If there's time at the end of the meeting you can come back to them. Otherwise you can add the item to the next meeting's agenda. When the agenda is published in advance, everyone knows how long they have to present/speak. Although the person who wanted to run over is irritated, everybody else in the room loves that you're sticking to the agenda.

There are times when the agenda may be wrong; you may uncover a huge mess. But you don't blow the rest of the agenda. You don't just say, "Oh, well we're going to blow everything else off," unless everyone decides it's really trivial and you need to cover this. What you say is "We don't have enough time to cover everything we planned on covering,

we need to make a choice." If an item is going to take an hour when you thought it would take 15 minutes, say "You know what, let's have another meeting with just those people who are affected by item Number 3, so let's still cover everything else we're still supposed to cover in this meeting." You want to be sensitive that there are crazy things that are going to happen all of a sudden, you could walk in and say "I'm sorry, but we just acquired a new company, or we were just acquired, we're going to wipe this clean and we're going to talk about what happened in the news today or in the press," that's fine. But that's rare, three or four meetings a year, not every week.

## **5. Use A Parking Lot.**

The parking lot is a very powerful tool and it's simple as this: A parking lot is a place for issues that come up in the meeting that are not on the agenda.

Let's say we're talking about quarterly sales projections, and somebody says, "Well before we do this, we've really got to talk about the logistical problem that we've got." That brings up the fact that we're having troubles sending in our sales reports. And the meeting facilitator has to say "Well, time out. That's not on the agenda, we're talking about sales forecasts here. It's important, we're going to throw it in the parking lot." You can have a chart on the wall or a piece of paper in the middle of the table to record the parking lot items. If it's visual to everybody, it's a little bit more effective.

At the end of the meeting you've got five minutes for parking lot issues, every single time. During the parking lot time, you don't handle each item. Let's say you need a 15-minute logistical item, you don't have a 15-minute logistical discussion in the last five minutes of the meeting. You say, "Ok, what are we going to do about the logistical thing." You can't solve it now, so you have to decide what you can get done in the next five minutes. Maybe you put it on your next agenda. Maybe you decide someone will handle it before the next meeting.

Nine times out of 10, there's not a lot in the parking lot. So you finish early, providing you've stuck to your agenda along the way. The parking lot becomes a great buffer at the end of the meeting, it gives a place to offload items, and it still finishes you early for every hour.

## 6. Fix Responsibilities.

This is Mark's favorite recommendation. At the end of each agenda item, wrap up by solidifying who is taking which responsibilities. This way everyone knows who is committed to doing what. If you get someone to commit something out load in a meeting they are much more likely to follow up on it.

So wrap each agenda item - what is going to be done by whom by when? "So Bob you're going to do X by Friday, right?" And you ask it as a question, that way Bob has to say that out load yes or no or I didn't understand. And you got verbal confirmation in front the rest of the group.

## 7. Finish On Time.

This is simple if you start on time, keep to your agenda, and wrap each agenda item at the correct time. Everybody will forgive you running every one of your meetings five minutes over. **If** you only go five minutes over every time. But the meeting that starts fifteen minutes late and then runs thirty minutes late is no longer really a meeting. It's just kind of a gaggle of people who are being unprofessional about other people's time.

We even say that finishing on time is better than starting on time. If you start five minutes late, don't let it run over. Just go a little faster because you were a little bit sloppy in the beginning. Don't allow the sloppiness to carry over into the next meeting, and the next meeting.

**There is one exception**, the general rule is never go over and here's the exception. If you are at least ten minutes before the end of a meeting and you believe that with an additional five or ten at the most fifteen minutes you can finish everything on your agenda, stop ten minutes in advance and ask the group for a consensus that it's okay to run over. If five of the ten people have to go to another meeting or are already late then you can't do it. But if everybody in the room can stay and you will finish everything on the agenda, then it's ok to go over. You cannot ask that at the top of the hour, one minute before the end of the meeting, because that's not managing your time well. But that's the one exception. If you give people advanced notice and ask for their commitment and a consensus on it, then it's reasonable to go over.



What much more powerful though is if you run your meeting well by starting on time, handling each agenda item, and wrapping each agenda item, you can finish early ninety percent of the time. **So the other exception to finishing on time is finishing early.**

It is so important to finish on time and to send a message to your folks that you're not going to keep them over so they can professionally plan their day around the meeting. It's worth a little bit of tension or conflict at each one of the inflexion points during the meeting to finish on time. People will love you as a manager as a meeting manager if you finish on time. And it's a great way to show respect for your folks. If you haven't finished the agenda, you declare the meeting over at the scheduled time. Talk to people later, send an email, whatever, but don't figure out those last agenda items then.

**Also, you've got to end the meeting.** Otherwise everybody else will sit there as a matter of respect your of your position and power. You stand up and walk out. Then everybody else will feel it's okay to go and yet you will still have enough respect and professionalism you can come back and cover everything you need to cover.

## **8. Publish Notes.**

This can be frustrating because many people think the minutes need to be very formal. Basically all minutes are is who said we're going to do what and what we decided on. It's the high level actions and owners that came out of the meeting. It doesn't matter if they're handwritten.

In an ideal situation, there is an admin there taking notes during the meeting. Then the admin can put together the minutes, highlighting who said they were going to do what, what was decided, and what was reported. It's a series of bullets without much discussion or detail. It is not a summarization of every comment.

If you don't have an admin, rotate who's responsible for the minutes. Try to avoid the person who's doing minutes for that week having significant role in contributing and presenting.

The minutes are sent to everyone who attended the meeting. You don't need to repeat reports in the minutes, and you don't need a bunch of attachments to them. Very simple formatting and hand written is absolutely fine. Copy it on the copier and put it on people's

desks. Yes, email is fine too. It doesn't have to be a separate word document it can literally just be a series of bullets in the body of the email. The vast majority of attachments never get read.

## **9. Continuously Improve.**

Once you start using this effective meeting protocol, you'll be a minor deity in your company. But we set up some ground rules, we set up some standards, and then after three or four months we start drifting away from them and we go back to what the rest of the culture in our organization is doing.

Every once in a while it helps to review the ground rules, and ask if you're in fact following your principles. Include a 10-minute meeting review as an agenda item on one of your meetings every three months. How are we doing? Are we sticking to our guns? Are we avoiding the one off conversations? Are people staying away from their BlackBerries and pagers? Are people taking calls in the meeting? Are we starting on time? Are we finishing on time? Are we using the parking lot right?

This is a chance to open feedback to an entire group about how meetings are being run and whether or not they are effective. And there may be a more effective way. It's as simple as looking at the ground rules and asking whether we're following them. Then, are we in fact agreeing that they work? And if they don't work, we change them, simple as that.

If you want to change your organization's meetings, it's easy. Start running your meetings a certain way and turn to your directs and to your managers or your seniors managers and say, "This is the way I want you to run your meetings and I'll be sitting in and I'll be giving your feedback about your meetings." You'll change the culture and it doesn't take very long. All you have to do is run a couple of meetings and show them that your meetings get things done, are respectful, start on time, and finish on time. And they can be sure that they're going to be treated well. They'll get it and they'll follow right along.

When doing the meeting reviews, don't forget to pat people on the back. There are some people who are always on time and always give great minutes; there are other people that are always late. Make a point to say thank those people who are contributing to successful meetings in a professional way. It makes your job so much easier.

## 10. Use A Facilitator.

This is actually one of the most powerful levers you can use in a meeting. We've coached hundreds of managers on how to run meetings. And they can do everything else on the list pretty easily all by themselves. Having a facilitator is a little bit harder and we've seen more managers struggle with this.

Having a facilitator separates the leader from the person who runs the meeting itself. The person running the meeting is keeping you on the agenda, on time, fixing responsibilities, ending on time, making sure the parking lot is covered, and enforcing the ground rules.

Think about the meeting as having two parts: **Content** - what you're talking about - and **Process** - the agenda and how you talk about it. If you're giving input and running the meeting, you can't do both exceptionally well. You can either focus on content or you can worry about everyone's voice being heard and following the agenda. If you offload the process part of your meeting on the facilitator, you can focus on content. To the outside observer, it will look like the facilitator is the boss because he or she is running the meeting and you're kind of relaxing. But you'll be able to have a dialog with everybody on your team.

We recommend rotating through your directs to facilitate. Now that also means the facilitator is out of the content discussion because he or she is worried about the process. We generally don't recommend the facilitator be the one who writes the minutes. Again, doing both tasks will take away the effectiveness of both.

Can you do it all by yourself, be the leader and the facilitator? Yes you can, but it is far more powerful to let somebody else do it. If you have your directs facilitate, they'll all get better at running meetings. And the directs get to see you have content input rather than process input. But you have to set a powerful example of **letting the facilitator actually run the meeting.**

If you play both roles, the problem is you're all too willing to sacrifice the rules in your own interest because you're the boss and you can get away with it. Bosses want to the content stuff because that's what their job is and they forget to do the process stuff. Then the meeting ends up running over, which sends the wrong message. Your direct reports will

see you as having a great deal of more power if you are willing to give up the process of the meeting to give you more focus on the content. They'll say, wow she is really confident in who she is that she can let somebody else run her meeting so she can mix it up with us about the ideas and really the important stuff of this meeting rather than the facilitation, the process of this meeting.

## Wrap Up

1. **Pre-Publish An Agenda**
2. **Start On Time**
3. **Set Some Ground Rules**
4. **Stick To Your Agenda**
5. **Use A Parking Lot**
6. **Fix Responsibilities**
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8. **Publish Notes**
9. **Continuously Improve**
10. **Use A Facilitator**

If you do five of these ten recommendations, you're going to be immensely more effective than anybody else. If you do all ten, you'll be knocking home runs out of the park and your team will love it and they will proselytize to other parts of the organization. Something else that will happen - your hour long meetings will start lasting forty-five minutes because you will start realizing what you can cut out of meetings and your team will love that as well. Your team may not end up loving meetings. But perhaps you'll get feedback about how your meeting was the most effective in weeks.