Effective Meetings
Presented by Jessica L. Walter, M.A.
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Agenda
- Why and who of meetings
- Structure and communication
- In-meeting techniques

6 Reasons We Meet

1. Decision making
2. Brainstorming
3. Producing deliverable
4. Planning
5. Alignment
6. Connection

Listen to “How to Create Meaningful Gatherings” with Priya Parker:
https://coachingforleaders.com/podcast/395/

Why are we here? Who to invite?
- Purpose of the meeting
- Outcome of the meeting
- Determine invitees

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Outcome</th>
<th>Invite people because you need their...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brainstorm course delivery models</td>
<td>Create 3 prototypes for course delivery</td>
<td>Knowledge</td>
</tr>
<tr>
<td>Review final curricular changes</td>
<td>Approve proposed changes</td>
<td>Perspective</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Buy-in</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Authority</td>
</tr>
</tbody>
</table>

Should I attend?
- Uncertain of the purpose or why you’ve been invited? Ask.
- Accept and decline accordingly
- Provide feedback
Prework

- 5-10 minutes for every 30 minutes of meeting
- Send with enough lead time
- State expectations
- Draw attention to areas that will be discussed (areas of tension or where input is needed)

Write your agenda

- 5 minutes at top and bottom of agenda
- How long will each time take?
- Send it in advance
- Post it during the meeting

Roles

- Facilitator
- Note taker
- Time keeper
- Rabbit hole, rehash goalie, I want to believe

After the meeting

- Summary of discussion
- Decisions*
- Next steps and action items*

*Review these in the last 5 minutes of the meeting as reminders for attendees

Who-What-When

<table>
<thead>
<tr>
<th>What</th>
<th>Who</th>
<th>When</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action verb, brief &amp; specific</td>
<td>Point Person</td>
<td>Due Date</td>
</tr>
<tr>
<td>Submit facilities request for outlet</td>
<td>Jed</td>
<td>3/28/18</td>
</tr>
<tr>
<td>Prepare draft policy statement</td>
<td>Jessica</td>
<td>4/11/18</td>
</tr>
</tbody>
</table>

Who-What-When-Status

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<th>What</th>
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<td></td>
</tr>
<tr>
<td>Submit facilities request for outlet</td>
<td>Jed</td>
<td>3/28/18</td>
<td>Complete</td>
</tr>
<tr>
<td>Task Description</td>
<td>Responsible</td>
<td>Deadline</td>
<td>Status</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>-------------</td>
<td>----------</td>
<td>----------</td>
</tr>
<tr>
<td>Prepare draft policy statement</td>
<td>Jessica</td>
<td>4/11/18</td>
<td>In progress</td>
</tr>
<tr>
<td>1st draft of budget</td>
<td>Sanji</td>
<td>3/15/18</td>
<td>Not started</td>
</tr>
<tr>
<td>Prepare for office move</td>
<td>Jessica</td>
<td>3/10/18</td>
<td>Removed</td>
</tr>
<tr>
<td>Market research for secret project</td>
<td>Kelsi</td>
<td>5/1/18</td>
<td>Overdue</td>
</tr>
</tbody>
</table>

**In-meeting techniques**

**Get visual**

- PowerPoints are good but boring
- Try post-its
  - Group brainstorm items
  - Illustrate a process
- Use white boards
SBAR
http://www.ihi.org/resources/Pages/Tools/SBARToolkit.aspx

- **Situation**
  concise statement of problem
- **Background**
  pertinent & brief information related to the situation
- **Assessment**
  analysis & considerations of options
- **Recommendation**
  action requested/recommended

First-to-Five
https://image.slidesharecdn.com

Multiple choice
a) Option 1
b) Option 2
c) Option 3

Hypothesis testing
- What are we trying to achieve?
- What do we want to try?
- How long do we want to try it?
- What does success look like?
- Who owns it?

Parking lot
- Capture items that come up that are not on the agenda.
- Address at end of meeting if time, schedule at future meeting

Plus-Deltas
- **Plus**
  - What went well
- **Delta**
  - What to change for next time
Advanced ideas

- Get outside, or outside of the office
- Walking meetings
- Stand up meetings

Late comers

- Slip in quietly, without disrupting
- Get caught up after the meeting
- Occasional vs. chronic

Human nature

- Can live with the outcome if good process has been followed
- Look at body language
- Who isn’t talking?
- Follow-up after meeting

Simple questions for standing meetings

- Can we cancel this meetings?
- Could this be an email instead?