

# Fixing Bad Meetings

**2014**

Instructor and Developer

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[www.ManageProjectsBetter.com](http://www.ManageProjectsBetter.com)

*We are going to address  
how to*

## **“Fix Bad Meetings”**

*We are going to start by  
understanding the importance of  
team communications and  
the role of meetings*

# Things That Work Well

# Things That Work Well

## Construction



## Delivery Services



## Medical Services



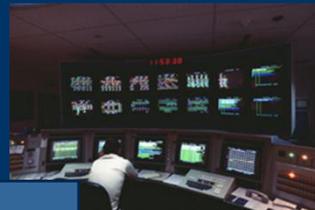
# Things That Work Well

## Emergency Services

## Air Travel



## Utilities



***Why Do These Things  
Work Well ?***

# How Things Work Well

## ■ COMMUNICATION

- Known Requirements
- Effective Operating Models
- Plan of Work
- Integrated Work
- Known Team Structure
- Defined Roles
- Teamwork
- Common Goals
- Leadership
- ..... (and more) .....

*Everyone of These  
Other Success factors  
Also Require  
Effective*

**COMMUNICATION**

# Many Studies Have Shown that Good Communications Drive Success and Poor Communications Drive Failure

- Medical Malpractice
- Major Construction Project Failures
- Large ERP and Business Application Developments
- Failures on Large Federal Government Projects
- Man Made Disasters and Accidents



**IT PROJECTS: MAJOR SUCCESSES AND EPIC FAILURES**



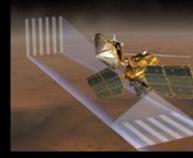
**FAILURE**  
**The FBI Virtual Case File**

The Bureau spent five years and \$170 million on an IT infrastructure modernization, but abandoned it by 2005. A lack of network management or archiving systems potentially put sensitive data

## NASA Mars Orbiter Lost

September 30, 1999

NASA lost a \$125 million Mars orbiter because one engineering team used metric units while another used English units for a key spacecraft operation.



## Worst Aviation Disaster in History

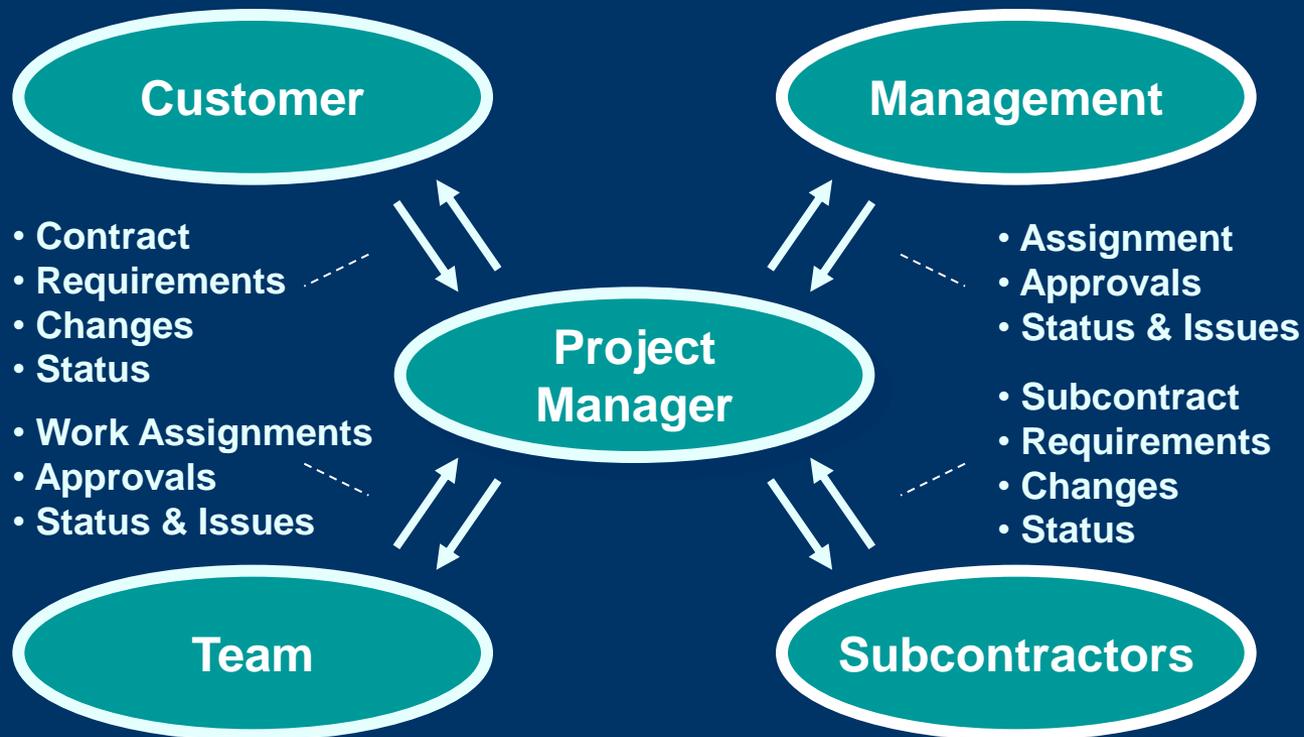
In 1977, at Tenerife in the Canary Islands, heavy accents and improper terminology among a Dutch KLM crew, an American Pan Am crew and a Spanish air traffic controller led to the worst aviation disaster in history, in which 583 passengers perished.



*OK.....So We Understand Teams  
Need Good Communications to  
be Successful,*

**So How Do We Do That?**

# PLAN Project Stakeholder Communications During Initiation



# IDENTIFY Project Communication Vehicles

- **Customer Agreement** – Internal or External Contract
- **Technical Information Communication Vehicles**
  - Requirements, Designs
  - Technical Issues and More
- **Project Plan** – Work, Resources, Schedule, Budgets, etc.
- **Project Metrics and Reports**
  - Requirements compliance, Schedule and Cost status
  - Risk Status, Problems & Corrective Actions Status
  - Other Selected Metrics
- **Customer Reporting Vehicles**
- **Management Reporting Vehicles**
- **Subcontractor Communications**
  - Contractual and Technical
  - Reporting and Issues

# Common Communication Methods

- Email, Text, .....
- Phone Call, Voice mail
- Documents with Text and Graphics
- In Person “Walk Around”
- Meetings



# Calibrating Stakeholder Communications

Everyone has there favorite communication method.....

- Text or email or call or in-person or letters or or video conference or .....

You want to “calibrate” everyone you work with and adopt the communication method **THEY LIKE**, NOT WHAT YOU LIKE!!!

- Customers
- Suppliers
- Team Members
- Management
- Peers
- .....



***Each  
Communication  
Method Has  
Drawbacks***

# Communication Method Pitfalls

## Email, Text, .....

- Misinterpreted, no body language, no tone of voice, no common visual, slow interaction, difficult brainstorming, .....

## Phone Call / Voice mail

- No body language, no printed record, no common visual, usually two individuals only vs. a group, .....

## Documents with Text and Graphics

- Not interactive, no Q&A, may not be viewed or read, may not be understood, may not be up to date, .....

## In Person “Walk Around”

- No visual, usually two individuals only vs. a group, no record, ...

## Meetings – In Person

- Takes time, may be poorly organized, requires leaving one’s work area, opens the door to non-productive conversation, .....

## Meetings – Virtual

- Takes time, may be poorly organized, technology hampers interactions, little or no body language, opens the door to non-productive conversation, .....

*Since All Methods Have  
Shortcomings,*

*Multiple Communication  
Means Must Exist on Projects*

# Meetings Do Things Other Communication Methods Cannot

## MEETINGS PROVIDE.....

- Multiple Simultaneous Communication Paths
- Opportunity to Quickly Brainstorm Ideas and Solutions
- Body Language Visible to Fully Understand Attitudes and Views
- Interactive Communications Support Understanding
- Establishes Roles Through In Personal Interchanges
- Physical Presence Builds Trust and Teamwork
- .....(*more*).....

*The bottom line is that there is  
no one communication  
answer, but meetings must be  
part of the answer....*

*but.....*

....But We **HATE** Meetings!!



*As we agree that meetings are  
a necessary component of  
project communications,  
then our task is to....*

**“Fix Bad Meetings”**

# Why Do We Hate Meetings?

## Some Reasons Many Dislike Meetings

- I do not have time to waste in meetings
- Meetings have unclear agendas
- Meetings are poorly managed
- Extroverts dominate, introverts do not participate
- There is no outcome I need
- I did not learn anything
- Can generate arguments and team discord
- Boring, not important to me, does not apply to me
- Too long
- Not needed
- No real outcome or change, just talk
- .....(*more exist*).....

# ***Meeting Solutions***

# Meeting Solution?



# Solutions Require Root Causes

## *Common Root Causes of Bad Meetings*

### Not Needed

### Not Planned

- Agenda Unclear
- Purpose Unclear
- Outcome Not Defined

### Poorly Managed

- Time
- Topics
- People

### Attendance Issues

- Too Many, Too Few
- Late, Leave Early
- Not Engaged

### Preparation

- Leader Not Prepared
- Attendees Not Prepared

### No Follow Through

- Minutes
- Actions

# Real Solution #1

*Don't Have Meetings*  
For Some Communications

# Is A Meeting Required?

## A Meeting Is Primarily Needed When.....

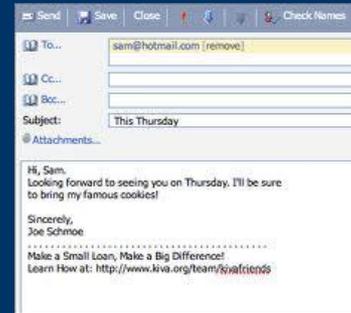
- Decisions need to be made
- Interaction is needed, brainstorming
- Building Ownership is desired
- Multiple parties need to share information
- Relationships and/or team building is desired

## Other Communication Means Ok When.....

- Mostly informational for awareness
- Immediate feedback is not needed
- Information is not time critical
- Interaction Not Critical

# Use Other Communication Methods

- Email, text message
- Phone call
- Voice mail
- Team information repository
- Formal reports & letters
- Newsletter
- In person “walk around”



# **Real Solution #2**

*Better Meeting Preparation*

# Pre-Meeting Work

## Meeting Leader Actions

### Meeting Leader

- Determines if a meeting is needed
- Defines the meeting
  - Defines meeting **purpose and outcomes**
  - Defines **participants** and their meeting **roles**
  - Defines the **agenda**
  - Defines **preparation requirements** of participants
  - Defines **meeting date, duration and location**
  - Chooses a **visual**
- Sends meeting notice with ***“WHY IT IS IMPORTANT”***
- Responds to questions about the meeting

# Pre-Meeting Work

## Meeting Invitee

### Meeting Invitee

- **Review meeting notice**
  - Meeting purpose and outcomes
  - Preparation requirements
  - Meeting date and duration
  - Meeting participants and roles
- **Accepts (or rejects) meeting notice**
- **Prepares for the meeting**

# **Have An Agenda**

*Yes, Have a Real Agenda*

# Meeting Type Drives Agenda

## Team Internal Meetings

- Periodic Staff Meetings
- Issue Meetings
- Team Internal Status Reviews

## Organization Level Meetings

- “All Hands”
- Improvement Initiatives
- Organizational Level Functions

## Team External Meetings

- Management Reporting
- Subcontractor Meetings
  - Proposal, Contract
  - Changes, Status
  - Technical Interchange
- Customer Meetings
  - Proposal, Contract
  - Changes, Status
  - Technical Interchange

***Different meetings will have different agendas***

# Generic Agenda

- **Introductions**
- **Purpose and Outcomes**
- **Background and Context Summary**
- **Meeting Core Topics**
- **Meeting Conclusion**

# Generic Agenda

## Introductions

- Who is here
- Why is each of us here (if it is not obvious)

## Purpose and Outcomes

- Purpose of this meeting
- Specific Outcomes from this meeting

***Define Both A Purpose  
and Outcomes***

# Example

## Purpose and Outcomes



Stating both purpose and outcomes is important

### Examples

#### Purpose:

*Determine a solution to issue “xyz”*

#### Outcomes:

*Defined issue, documented list of alternative solutions and a selected solution.....implementation tasks, dates and assignments*

# Example

## Purpose and Outcomes



Stating both purpose and outcomes is important

### Examples

#### Purpose:

*Complete a review to finalize our document*

#### Outcomes:

*Marked up document with needed changes that we all agree to and that is ready for final update and release*



# Purpose and Outcomes

## LESSON LEARNED

Write them on the whiteboard....



# Generic Agenda

## *Continued*

### Background and Context Summary

**Need** – Everyone needs to be on the same page on “What is Needed”

**Background** – Review the Background of this Topic

- **Prior meetings**
- **Existing conditions** / prior work completed / prior issues and solutions / .....
- **Direction** from management and/or customers

**Future Intent** – Intended actions that will happen as a result of this meeting should be common knowledge

# Generic Agenda

## *Continued*

### Meeting Core Agenda Topics

*Discussions, presentations, decisions and other actions that get the meeting to the desired outcomes*

- Topic 1
- Topic 2
- .....

### Meeting Conclusion

- Summary of actual meeting outcomes
- Summary of next steps and responsibilities
- Questions or comments

***Add A Topic of Interest  
or Special Value***

# Add A Topic of Interest



Add something that makes the meeting interesting and of value

## Examples:

- **Current events**
- Mention of **something new** (technology, tool or method)
- **Customer experience**
- **“Show and Tell”**
- Add a **learning topic**
- Have one **attendee report** on something at each meeting
- **Guest or Guest Speaker**
- .....(more).....



***Use a Meeting  
Checklist or Template***

# Meeting Template

- Refine the format so that it works best for your environment
- Post Agenda Before The Meeting
- Post Minutes After The Meeting

>> Your Organization's Name <<  
Revised by Instytut Informatyki at [www.mim.pwr.edu.pl/instytut/](http://www.mim.pwr.edu.pl/instytut/)

### Effective Meeting Worksheet

Meeting Title		Workshop Date:	
Meeting Date / Times	Date: 01 Jan 20xx	Start: 10:00 AM	Finish: 11:00 AM
Location			
Virtual Connection Info (Voice #, URL, Password, etc.)			
Meeting Leader	Name	Yak	Email
Meeting Contact	Name	Yak	Email

**Meeting Type** Check All That Apply  
 Information     Status Review     Decision     Staff Meeting  
 Problem Resolution     Working Meeting     Other (specify) \_\_\_\_\_

**Meeting Objective(s)** (State the primary reason for the meeting. See instructions for examples.)

**Meeting Intended Outcomes** (State the specific intended and results in terms of physical and products and/or solutions that address the objective and understanding of the meeting objective above. See instructions for examples.)

- Outcome 1
- Outcome 2

**Meeting Participants**

Name	Organization	Meeting Role	Required / Optional	Opt. for Virtual Attendance	Attended
			<input type="checkbox"/> Req'd <input type="checkbox"/> Opt	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Req'd <input type="checkbox"/> Opt	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Req'd <input type="checkbox"/> Opt	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Req'd <input type="checkbox"/> Opt	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Req'd <input type="checkbox"/> Opt	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

**Participant Preparation Required**  
(State what participants need to do prior to the meeting. If unique to an individual, include in "Special Requests" above.)

**Agenda**

	Topic	Time	Topic Lead	Intended Topic Outcome
1				
2				
3				
4				

### Meeting Record

**Primary Meeting Outcomes** (Decisions, Agreements, Recommendations, Approvals, Documents, Plans, etc.)

- Xx
- xx

**Key Minutes / Notes**

- Xx
- xx

**Next Steps**

	Next Step	Responsibility	Due Date
1			
2			
3			

1

# Meeting Template

>> Your Organization's Name <<

Provided by and Latest Version at [www.manageprojectsbetter.com](http://www.manageprojectsbetter.com)

## Effective Meeting Worksheet

<b>Meeting Title</b>				Worksheet Date:
<b>Meeting Date / Times</b>	Date: 01 Jan 20xx	Start: 10:00 AM	Finish: 11:00 AM	
<b>Location</b>				
<b>Virtual Connection Info</b>	(Voice #, URL, Passwords, etc.)			
<b>Meeting Leader</b>	Name:	Tel:	Email:	
<b>Meeting Contact</b>	Name:	Tel:	Email:	

### Meeting Type *Check All That Apply*

- Information     
  Status Review     
  Decision     
  Staff Meeting  
 Problem Resolution     
  Working Meeting     
  Other (specify) \_\_\_\_\_

### Meeting Objective (s) *(State the primary reason for the meeting. See instructions for examples.)*

### Meeting Intended Outcomes *(State the specific intended end results in terms of physical end products and/or conditions that extend the definition and understanding of the meeting objective above. See instructions for examples.)*

- Outcome 1
- Outcome 2

### Meeting Participants

<u>Name</u>	<u>Organization</u>	<u>Meeting Role</u>	<u>Required / Optional</u>	<u>OK for Virtual Attendance</u>	<u>Attended</u>
			<input type="checkbox"/> Req'd <input type="checkbox"/> Opt	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
			<input type="checkbox"/> Req'd <input type="checkbox"/> Opt	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
			<input type="checkbox"/> Req'd <input type="checkbox"/> Opt	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
			<input type="checkbox"/> Req'd <input type="checkbox"/> Opt	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
			<input type="checkbox"/> Req'd <input type="checkbox"/> Opt	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
			<input type="checkbox"/> Req'd <input type="checkbox"/> Opt	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes

### Participant Preparation Required

*(State what participants need to do prior to the meeting. If unique to an individual, include in "Special Requests" above.)*

# Optional Ways to Use a Template



## Leader – Option 1



- Completes it
- Distributes it
- Uses it during and after the meeting

## Meeting Participant

- Use it to understand the meeting
- Use it to help manage the meeting
- Use it to help after the meeting

## Leader – Option 2

- Completes it
- No Distribution
- Uses it during and after the meeting

## Leader – Option 3

- Uses it as a checklist for planning and managing the meeting

>> Your Organisation's Name <<  
Revised by updated version: # [www.effective-meetings.com](http://www.effective-meetings.com)

### Effective Meeting Worksheet

Meeting Title			Workshop Date
Meeting Date / Times	Date: 01 Jan 2008	Start: 10:00 AM	Finish: 11:00 AM
Location			
Virtual Connection Info (Voice #, URL, Webex, etc.)			
Meeting Leader	Name	Title	Email
Meeting Contact	Name	Title	Email

Meeting Type: Check All That Apply  
 Information  Status Review  Decision  Staff Meeting  
 Problem Resolution  Working Meeting  Other (specify): \_\_\_\_\_

Meeting Objectives List (Use the acronym SMART for the meeting. See instructions for examples.)

Meeting Intended Outcomes (Show the specific intended results in terms of physical end products and/or decisions that enable the attainment of the meeting objectives above. Use acronyms for examples.)

- Outcome 1
- Outcome 2

Name	Organization	Meeting Role	Required / Optional	On for 20/90 Attendance	Attend
			Required / Optional	On / Off	On / Off
			Required / Optional	On / Off	On / Off
			Required / Optional	On / Off	On / Off
			Required / Optional	On / Off	On / Off
			Required / Optional	On / Off	On / Off

Participant Preparation Required (List all participants who are to prepare for the meeting. If unique to an individual, include in "Special Requests" above.)

Agenda

	Topic	Time	Topic Lead	Intended Topic Outcome
1				
2				
3				

### Meeting Record

Primary Meeting Outcomes (Decisions, Agreements, Recommendations, Approvals, Conclusions, Plans, etc.)

- 01
- 02
- 03
- 04
- 05

Item #	Item	Responsible	Due Date
1			
2			

1

# Detail Template Available

## www.ManageProjectsBetter.com

>> Your Organization's Name <<

Provided by and Latest Version at [www.manageprojectsbetter.com](http://www.manageprojectsbetter.com)

- Information     Status Review     Decision     Staff Meeting  
 Problem Resolution     Working Meeting     Other

>> Your Organization's Name <<

Provided by and Latest Version at [www.manageprojectsbetter.com](http://www.manageprojectsbetter.com)

Agenda Topics:

>> Your Organization's Name <<

Provided by and Latest Version at [www.manageprojectsbetter.com](http://www.manageprojectsbetter.com)

### Effective Meeting Worksheet

Meeting Title	Worksheet Date:		
Meeting Date / Times	Date: 01 Jan 20xx	Start: 10:00 AM	Finish: 11:00 AM
Location			
Virtual Connection Info	(Voice #, URL, Passwords, etc.)		
Meeting Leader	Name:	Tel:	Email:
Meeting Contact	Name:	Tel:	Email:

#### Meeting Type Check All That Apply

- Information     Status Review     Decision     Staff Meeting  
 Problem Resolution     Working Meeting     Other (specify) \_\_\_\_\_

#### Meeting Objective(s) (State the primary reason for the meeting. See instructions for examples.)

**Meeting Intended Outcomes** (State the specific intended end results in terms of physical end products and/or conditions that extend the definition and understanding of the meeting objective above. See instructions for examples.)

- Outcome 1
- Outcome 2

#### Meeting Participants

Name	Organization	Meeting Role	Required / Optional	OK for Virtual Attendance	Attended
			<input type="checkbox"/> Req'd <input type="checkbox"/> Opt	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Req'd <input type="checkbox"/> Opt	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Req'd <input type="checkbox"/> Opt	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Req'd <input type="checkbox"/> Opt	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Req'd <input type="checkbox"/> Opt	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

#### Participant Preparation Required

(State what participants need to do prior to the meeting. If unique to an individual, include in "Special Requests" above.)

#### Agenda

	Topic	Time	Topic Lead	Intended Topic Outcome
1				
2				
3				
4				

#### Meeting Record

##### Primary Meeting Outcomes (Decisions, Agreements, Recommendations, Approvals, Documents, Plans, etc.)

- xx
- xx

##### Key Minutes / Notes

- xx
- xx

##### Next Steps

	Next Step	Responsibility	Due Date
1			
2			
3			

1

>> Your Organization's Name <<

Provided by and Latest Version at [www.manageprojectsbetter.com](http://www.manageprojectsbetter.com)

#### Next Meeting

Date: 01 Jan 2012	Start: 10:00 AM	Finish: 11:00 AM	Location:
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>> DELETE THESE INSTRUCTIONS PRIOR TO TRANSMITTAL <<

### General Instructions

Many meetings can be painful or a waste of time. This can happen if meetings are poorly designed and managed. A solution is to apply meeting management basic methods and this worksheet is one approach.

#### Meeting Organizer – If you are the meeting organizer, do the following:

- Read the "Worksheet Completion Instructions" below to understand each section.
- Complete all applicable sections in the worksheet. Skipping sections increases the risk of meeting failure. Completing the worksheet takes time but it is an investment in making meetings less painful and more effective.
- For very brief, clearly defined and single topic meetings, an abbreviated version of the worksheet may be appropriate.
- **Before the Meeting** – Complete the top part of the meeting worksheet to design your meeting. Share that information as you send the meeting notice with those invited to the meeting and anyone else that should be aware of the meeting. In some situations for important meetings, you might consider completing and distributing a draft version of the worksheet to allow meeting attendees to help define the meeting.
- **During the Meeting** – Bring the worksheet to the meeting and distribute copies. Use the worksheet to manage the meeting.
- **At the End of the Meeting** – Complete the meeting minutes and actions section with the meeting attendees.
- **Right After the Meeting** – Distribute the completed worksheet with minutes and actions to all attendees. In your email, ask to be notified of any errors within 24 hours. Use the completed worksheet to track actions completion if another action tracking system is not in place. Retain the completed worksheet as a record of the meeting and actions.

#### Meeting Invitee – If you are invited to meetings, do the following:

- If you are invited to a meeting and no worksheet such as this is provided, use the top part of the worksheet to question the meeting organizer of the intent, outcomes and any needed preparation for the meeting to make sure your time is well spent.
- Use this worksheet to educate yourself on how to manage meetings you call.

#### Organization Management – If you manage an organization, do the following:

- Have your organization use this worksheet (or some variation) to make meetings and your organization more effective. Start by using it yourself, lead by example.

### Worksheet Completion Instructions

**Meeting Title:** Use a title that clearly expresses the context and main purpose of the meeting.

Examples: Project xyz issue \_\_\_\_\_, discussion customer status review, customer direction change related to \_\_\_\_\_, Problem \_\_\_\_\_, solutions discussion, .....

**Meeting Leader and Contact:** Identify the leader of the meeting. Identify a contact name for questions about the meeting in absentia from the leader.

**Meeting Type:**

Attendees need to know what the type of meeting is being called; this will support success. A single meeting could be multiple types, check all that apply.

2

# Real Solution #3

*Better Meeting Management*

***Just Before the Meeting***

# Just Before the Meeting

## *“Important Meetings”*

### Day Before the Meeting

#### Walk Around or Call

- Are you attending?
- Needed preparation clear?
- Any questions?

#### Email

- “Reminder”
- Offer to answer questions
- Restate purpose, outcome and preparation

### Day of the Meeting

- Review the Agenda
- Print agenda hardcopy
- Be prepared
- Check logistics

# ***Opening The Meeting***

# Opening the Meeting

## Arrive Early

- Check room logistics
- Write the meeting purpose and outcomes on the white board

## Start On Time

## Verify All Needed Attendees are Present

## Personal Introductions (if needed)

- Introduce yourself
- Have everyone introduce themselves and their meeting role

# Opening the Meeting

- Pass out **agenda hardcopy**
- State the **purpose and outcomes** for the meeting
- Review **agenda**
- Restate what **preparation** was requested
- **Ask for questions**



# Opening the Meeting

- Summarize **background** of this topic
- Summarize any **past meetings**
- State pertinent management or customer **direction**
- Define what will happen **after this meeting**

# ***Manage the Meeting***

# Conducting The Meeting

- **Go through the agenda**
- **As each agenda item is completed**, ask all if we are done with that topic
- **Watch the body language and comments from the participants** as you address each agenda item
- You do **NOT WANT TO LOSE THE AUDIENCE** because then, the meeting is over
- **Use a “Visual” to focus discussions**

***Use A “Meeting Visual”***

# Meeting Visuals



***A “Visual” will focus meeting attendees attention on one thing***

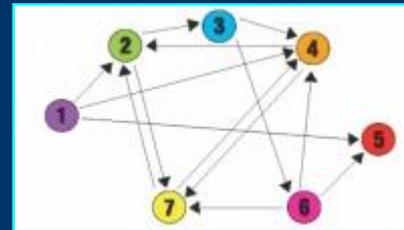
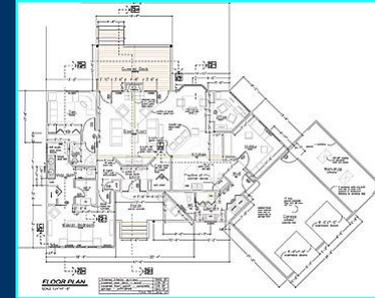


# Meeting Visuals

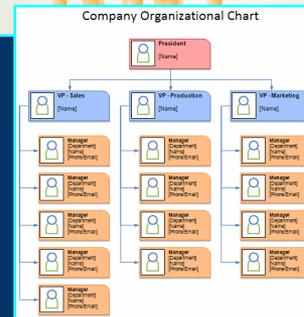
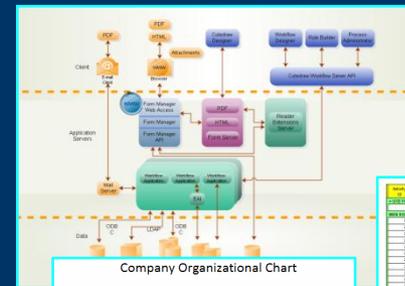
## What ?

- Drawing or Picture
- Relationship Diagram
- List or Outline
- Process Diagram
- Schedule
- Hierarchy Chart

***A Depiction of the Core Meeting Topic***



Outline	
Agenda	Page 9
1. Introductions	Page 9
2. Why Team Communications Are Important	Page 9
3. Types of Meetings	Page 9
4. The Good and That Not So Good About Meetings	Page 11
5. Common Meeting Solutions	Page 14
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5.2. Agenda Development	Page 15
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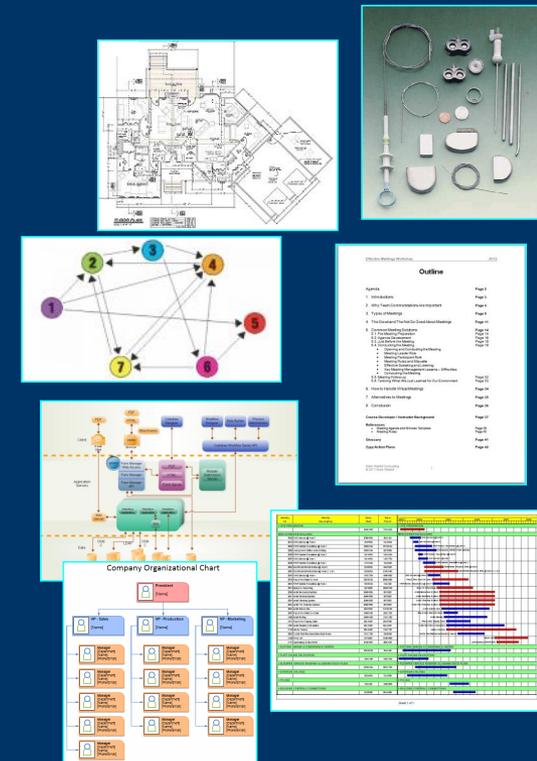
Task	Start	End	Duration	Dependencies
Task 1	1/1/2014	1/15/2014	14 days	
Task 2	1/1/2014	1/15/2014	14 days	
Task 3	1/1/2014	1/15/2014	14 days	
Task 4	1/1/2014	1/15/2014	14 days	
Task 5	1/1/2014	1/15/2014	14 days	
Task 6	1/1/2014	1/15/2014	14 days	
Task 7	1/1/2014	1/15/2014	14 days	
Task 8	1/1/2014	1/15/2014	14 days	
Task 9	1/1/2014	1/15/2014	14 days	
Task 10	1/1/2014	1/15/2014	14 days	
Task 11	1/1/2014	1/15/2014	14 days	
Task 12	1/1/2014	1/15/2014	14 days	
Task 13	1/1/2014	1/15/2014	14 days	
Task 14	1/1/2014	1/15/2014	14 days	
Task 15	1/1/2014	1/15/2014	14 days	
Task 16	1/1/2014	1/15/2014	14 days	
Task 17	1/1/2014	1/15/2014	14 days	
Task 18	1/1/2014	1/15/2014	14 days	
Task 19	1/1/2014	1/15/2014	14 days	
Task 20	1/1/2014	1/15/2014	14 days	
Task 21	1/1/2014	1/15/2014	14 days	
Task 22	1/1/2014	1/15/2014	14 days	
Task 23	1/1/2014	1/15/2014	14 days	
Task 24	1/1/2014	1/15/2014	14 days	
Task 25	1/1/2014	1/15/2014	14 days	
Task 26	1/1/2014	1/15/2014	14 days	
Task 27	1/1/2014	1/15/2014	14 days	
Task 28	1/1/2014	1/15/2014	14 days	
Task 29	1/1/2014	1/15/2014	14 days	
Task 30	1/1/2014	1/15/2014	14 days	
Task 31	1/1/2014	1/15/2014	14 days	
Task 32	1/1/2014	1/15/2014	14 days	
Task 33	1/1/2014	1/15/2014	14 days	
Task 34	1/1/2014	1/15/2014	14 days	
Task 35	1/1/2014	1/15/2014	14 days	
Task 36	1/1/2014	1/15/2014	14 days	
Task 37	1/1/2014	1/15/2014	14 days	
Task 38	1/1/2014	1/15/2014	14 days	
Task 39	1/1/2014	1/15/2014	14 days	
Task 40	1/1/2014	1/15/2014	14 days	
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Task 42	1/1/2014	1/15/2014	14 days	
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Task 44	1/1/2014	1/15/2014	14 days	
Task 45	1/1/2014	1/15/2014	14 days	
Task 46	1/1/2014	1/15/2014	14 days	
Task 47	1/1/2014	1/15/2014	14 days	
Task 48	1/1/2014	1/15/2014	14 days	
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Task 54	1/1/2014	1/15/2014	14 days	
Task 55	1/1/2014	1/15/2014	14 days	
Task 56	1/1/2014	1/15/2014	14 days	
Task 57	1/1/2014	1/15/2014	14 days	
Task 58	1/1/2014	1/15/2014	14 days	
Task 59	1/1/2014	1/15/2014	14 days	
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Task 77	1/1/2014	1/15/2014	14 days	
Task 78	1/1/2014	1/15/2014	14 days	
Task 79	1/1/2014	1/15/2014	14 days	
Task 80	1/1/2014	1/15/2014	14 days	
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Task 82	1/1/2014	1/15/2014	14 days	
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Task 84	1/1/2014	1/15/2014	14 days	
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Task 88	1/1/2014	1/15/2014	14 days	
Task 89	1/1/2014	1/15/2014	14 days	
Task 90	1/1/2014	1/15/2014	14 days	
Task 91	1/1/2014	1/15/2014	14 days	
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Task 93	1/1/2014	1/15/2014	14 days	
Task 94	1/1/2014	1/15/2014	14 days	
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Task 96	1/1/2014	1/15/2014	14 days	
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Task 98	1/1/2014	1/15/2014	14 days	
Task 99	1/1/2014	1/15/2014	14 days	
Task 100	1/1/2014	1/15/2014	14 days	



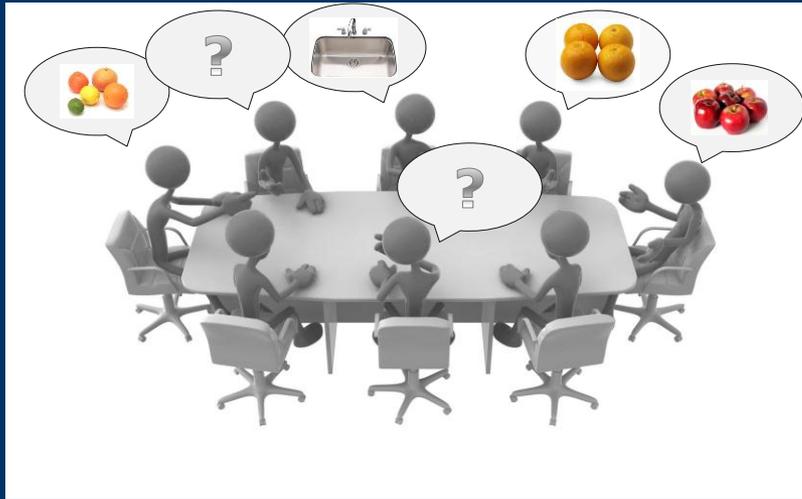
# Meeting Visuals

## Why ?

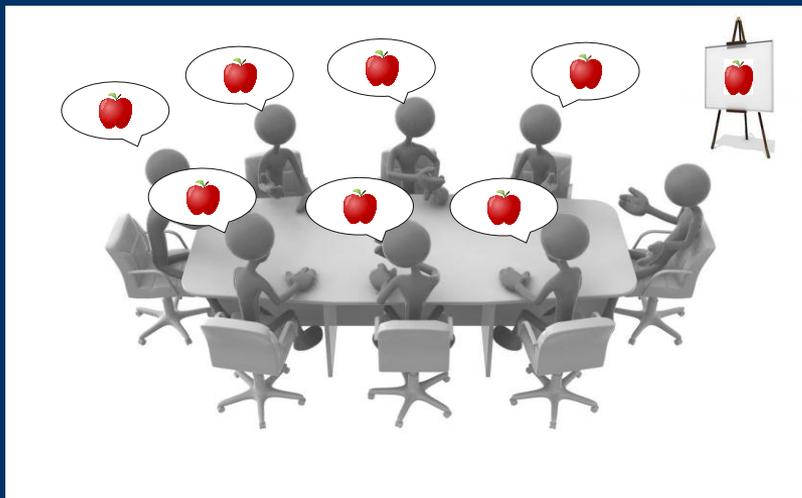
- Provides a common framework for agenda topics
- Focuses the discussion on a singular topic at any one time
- Provides a context of what has been discussed, is being discussed and will be discussed



# Meeting Visuals



**No “Visual” = No Focus**



**“Visual” = Focus**

# Conducting The Meeting

## WATCH THE TIME

- Before the meeting, make timing notes on the agenda
- During the meeting check your time progress
- If more time is needed for a given item....
  - Make a leadership decision to stay on topic or
  - Move ahead or
  - Ask the participants what is best



***Engage Everyone***

# Engaged Participants?

**YES**

**NO**



# How To Engage Participants

## What to Do

- Meetings Can Have Assignments to Report On
- *“I Want Everyone’s Opinion on This”*
- Ask Questions of Individuals  
*“What do you think?”*
- Ask Questions of the Group
  - *“Is this the most important topic?”*
  - *“What else should we address?”*
  - *“Should we decide now or wait till we have more information?”*
  - .....

**YES**



**NO**



# ***Meeting Rules***

# Meeting Rules to Consider

- *Leader*
- *Objectives & Agenda*
- *Right Invitees*
- *Preparation*
- *Timeliness*
- *Electronic Devices*
- *Managed & Notes Taken*
- *Respect & Listening*
- *Teamwork*
- *Follow-On Actions*
- *“Thank You”*
- *Summary*



## *Meeting Rules*

- \* *Every meeting has a leader*
- \* *Every meeting has a defined objective and an agenda which is provided by the leader before and at the start of the meeting*
- \* *All needed participants are invited to the meeting, no more, no less*
- \* *All participants prepare for the meeting*
- \* *The meeting starts and finishes on time*
- \* *The meeting leader manages the meeting to meet all objectives and to keep the meeting on track*
- \* *Subjects outside the scope of the meeting are noted and tabled*
- \* *Meeting participants respect other participants by listening without interrupting, giving all opinions professional respect*
- \* *All Meeting participants work as a team to attain meeting objectives and to enhance organization team work*
- \* *When "follow-on" activities are necessary, next steps, responsibilities and completion dates are defined*
- \* *The meeting ends with a "thank you" to all participants*
- \* *The meeting leader distributes a summary of meeting Results*

# Electronic Devices?

## ■ **Good**

- *Research topic of discussion*
- *Take notes*
- *Show pertinent documents or graphics*



## ■ **Not Good**

- *Do other work, check emails*
- *Disrespectful to other meeting participants*
- *De-energizes the meeting*



# Some Rules Seem Easy, But

## ■ Cell Phones

- OK to have on
- OK to take a call
- OK to take a call if one leaves the room
- Must be Off
- Must be Silent
- No Rule

## ■ Texting

- No
- OK
- No General, OK if .....

## ■ PC Email

- No
- OK

## • PC Note Taking

- No
- OK

## • PC Web Surfing

- No
- OK
- No General, OK if .....

## • PC Used for References

- No
- OK

## • Side Conversations

- No
- OK
- No General, OK if .....

# ***Handling Difficult Situations***

# How to Handle Difficult Situations

## Off Topic Discussions

- Refer to the time remaining
- Mention the needed outcome
- Identify future venue for “off-topic” subject

## Side Discussions

- Stop talking and look in their direction

## Complainer or Griper

- Listen, some folks just need to vent
- If “on-topic” ask others about their views
- If “off-topic” mention the importance of that topic (if it is important) and that
  - We can deal with that later, or if it is a simple issues....”Here is what we can do on that”



# How to Handle Difficult Situations

## Aggressive Debate

- If this is really a **constructive debate** and is in scope of the meeting agenda, **let it go, but watch it**
- If it becomes **destructive**, complement both parties on their interest and energy and **ask for the views of others**
- Say “**we need to move on, time is short**”

## Talks Too Much

- Mention that “we need to move ahead, **what is the final thought you want the team to understand?**”
- If this does not work, when they take a breath, **thank them for their comment** and ask for other opinions

## Will Not Talk

- Mention to the group that you **need inputs from all parties**
- Complement each quiet person on their experience and **ask them what their views are**
- Ask the group open ended questions, **have all respond individually**

# How to Handle Difficult Situations

## Disaster Meeting

You are not the meeting lead but, the meeting is a disaster; no agenda, no objectives, arguments, random thoughts are being offered and the meeting is degrading into something no one wants.

### Ask Some The Following:

- **What exactly are we trying to resolve?**
- **What should the primary objective** of this meeting be, what do we need to decide today?
- **What outcome do we need?**
- **Should discuss....**(write the topics on a white board)
- **Should we meet later** when we have a better handle on this?

# ***Concluding the Meeting***

# Concluding the Meeting

- Give everyone a “heads up” at 10 minutes
- If remaining time is not enough
  - Tell the group what agenda items will be discussed, or ask the group which items should be addressed
  - Discuss how the un-addressed agenda items should be handled
- Conclude discussions 5 minutes before the scheduled end time for summary and actions



# Use the Meeting Template as A Guide to Close the Meeting

- Note Outcomes
- Note Key Minutes
- Note Next Steps

**Ensure your meeting has a productive conclusion**

>> Your Organization's Name: <<  
Revised by and last revised at [www.markwaldof.com/Effective](http://www.markwaldof.com/Effective)

### Effective Meeting Worksheet

Meeting Title	WORKSHOP CALL		
Meeting Date / Times	Date: 01 Jan 20xx	Start: 10:00 AM	Finish: 11:00 AM
Location			
Virtual Connection Info (Voice #, URL, Password, etc.)			
Meeting Leader	Name:	Tit:	Email:
Meeting Contact	Name:	Tit:	Email:

Meeting Type Check All That Apply  
 Information  Status Review  Decision  Staff Meeting  
 Problem Resolution  Working Meeting  Other (specify): \_\_\_\_\_

Meeting Objective (s) (State the primary reason for the meeting. See instructions for examples.)

Meeting Intended Outcomes (State the specific intended end results in terms of physical and products and/or conditions that describe the deliverables and understanding of the meeting objective above. Use instructions for examples.)

- Outcome 1
- Outcome 2

Meeting Participants

Name	Organization	Meeting Role	Invited / Outcome	OK for Virtual Attendance	Attended
			<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Participant Preparation Required  
(State what participants need to do prior to the meeting. If unique to an individual, include in "Special Requests" above.)

Agenda

	Topic	Time	Topic Lead	Intended Topic Outcome
1				
2				
3				
4				

### Meeting Record

Primary Meeting Outcomes (Decisions, Agreements, Recommendations, Approvals, Discoveries, Plans, etc.)

- xx
- xx

Key Minutes / Notes

- xx
- xx

Next Steps

	Next Step	Responsibility	Due Date
1			
2			
3			

1

# **Real Solution #4**

*Better Meeting Follow-up*

# After the Meeting

- Finish the meeting minutes
- Use a template
- Send to all with a request for any corrections or additional information within 24 hours
- Update and post



# Real Solution #5

*Use Virtual Meetings  
When That is the Best Approach*

# Virtual Meeting Types

- Full real time wide screen video and audio, electronic white boards, ....



- PC video and audio



- Audio only



# Virtual Meetings

## Good

- Saves tons of time
- Saves travel
- Saves money
- Allows wider participation
- Fully adequate for many meeting needs

## Not Good

- Hard to manage
- Technology delays
- Time zone differences
- Little or no body language
- Cultural and language challenges are amplified

# Virtual Meetings

## What to Do

### Standard Things Done With Greater Focus

- Very clear agenda
- Very clear purpose and outcomes
- Very clear instructions on preparation
- Very important to have “Visuals”
- Careful focus on meeting management

### Virtual Meeting Special Things That Are Important

- Make sure the technology type is appropriate for the topic
- Make sure the technology works!
- Fewer agenda items
- Slower pace
- Take more time to validate what is said and understood
- Minutes are a “must”

# Real Solution #6

*Use Meeting Tools*

# Meeting Tools

## Template

- Agenda
- Minutes

Effective Meeting Worksheet

Meeting Title: \_\_\_\_\_ Date: \_\_\_\_\_ Time: \_\_\_\_\_

Meeting Location: \_\_\_\_\_

Meeting Type: \_\_\_\_\_

Meeting Objectives: \_\_\_\_\_

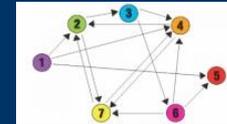
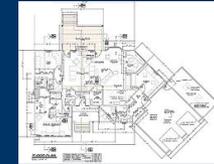
Meeting Participants:

Name	Classification	Meeting Role	Prepared / Assigned	On for / Off for	Attendance

Meeting Record

Date	Time	Location	Attendees	Agenda	Minutes

## Visuals



Task	Start	End	Progress
Task 1	1/1	1/10	100%
Task 2	1/1	1/15	50%
Task 3	1/5	1/20	20%
Task 4	1/10	1/25	10%
Task 5	1/15	1/30	5%

## Rules

**Meeting Rules**

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- \* All needed participants are invited to the meeting, no more, no less
- \* All participants prepare for the meeting
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- \* When "follow-on" activities are necessary, next steps, responsibilities and completion dates are defined
- \* The meeting ends with a "thank you" to all participants
- \* The meeting leader distributes a summary of meeting Results

Mark Walsh Consulting 611-885-6000 www.markwalsh.com

## Other?



## Meeting Rules

- \* Every meeting has a leader
- \* Every meeting has a defined objective and an agenda which is provided by the leader before and at the start of the meeting
- \* All needed participants are invited to the meeting, no more, no less
- \* All participants prepare for the meeting
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- \* When "follow-on" activities are necessary, next steps, responsibilities and completion dates are defined
- \* The meeting ends with a "thank you" to all participants
- \* The meeting leader distributes a summary of meeting Results

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# Meeting Tools

## Downloadable

[www.ManageProjectsBetter.com](http://www.ManageProjectsBetter.com)

>> Your Organization's Name <<  
 Provided by an updated version of [www.ManageProjectsBetter.com](http://www.ManageProjectsBetter.com)

### Effective Meeting Worksheet

Meeting Title	Worksheet Date	
Meeting Date / Times	Date: 01 Jan 200x	Start: 10:00 AM Finish: 11:00 AM
Location		
Virtual Connection Info (Voice #, URL, Password, etc.)		
Meeting Leader	Name:	Tel: Email:
Meeting Contact	Name:	Tel: Email:

**Meeting Type** Check All That Apply  
 Information  Status Review  Decision  Staff Meeting  
 Problem Resolution  Working Meeting  Other (specify) \_\_\_\_\_

**Meeting Objective(s)** (State the primary reason for the meeting. See instructions for examples.)

**Meeting Intended Outcomes** (State the specific intended end results in terms of physical and products and/or activities that fulfill the objective and understanding of the meeting objective above. See instructions for examples.)

- Outcome 1
- Outcome 2

**Meeting Participants**

Name	Organization	Meeting Role	Required / Outcome	OK for Virtual Attendance	Attended
			<input type="checkbox"/> Req'd <input type="checkbox"/> Opt	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Req'd <input type="checkbox"/> Opt	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Req'd <input type="checkbox"/> Opt	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Req'd <input type="checkbox"/> Opt	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Req'd <input type="checkbox"/> Opt	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

**Participant Preparation Required**  
 (State what participants need to do prior to the meeting. If unique to an individual, include in "Special Requests" above.)

**Agenda**

	Topic	Time	Topic Lead	Introduce Topic	Outcome
1					
2					
3					
4					

### Meeting Record

**Primary Meeting Outcomes** (Decisions, Agreements, Recommendations, Approvals, Decisions, Plans, etc.)

- X1
- X2

**Key Minutes / Notes**

- X3
- X4

**Next Steps**

	Next Step	Responsibility	Due Date
1			
2			
3			

1

**Conclusion**

# Things That Work Well



## How Things Work Well

### ■ COMMUNICATION

- Known Requirements
- Effective Operating Models
- Plan of Work
- Integrated Work
- Known Team Structure
- Defined Roles
- Teamwork
- Common Goals
- Leadership
- ..... (and more) .....

*Everyone of These  
Other Success factors  
Also Require  
Effective*

**COMMUNICATION**

# Meetings

## *Why So Important?*

Meetings are important for many reasons including:

- **Communication, Communication, Communication**
- **Everyone Hears and Sees.....**
  - Same Message
  - Same Questions and Answers
  - Same Team Attitude
- **Brainstorming**
- **Unplanned Communications Happen**
- **Team Building**
- **Roles Defined and Reinforced**
- **Validate Desired Behaviors**
- .....

*Many Things Can Be Changed*

*You Can't Boil the Ocean*

*So, What Will You Do to Start?*

# Ideas For Making Changes

## What Could You Do?

- Prepare Better?
- Use a Meeting Template?
- Better Agenda and Outcome Definitions?
- Meeting Rules ?
- Better Meeting Minutes and Follow-Up?
- Be more Active in Meeting Management?
- Design a Set of Truly Needed Meetings?
- Or .....?

# A Few Quotes

- The most important thing in communication is hearing what isn't said. [Peter Drucker](#)
- The single biggest problem in communication is the illusion that it has taken place. [George Bernard Shaw](#)
- Communication works for those who work at it. [John Powell](#)
- Science may never come up with a better office communication system than the coffee break. [Earl Wilson](#)

# Fixing Bad Meetings

Speaker

Mark Waldof

Mark Waldof Consulting LLC

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# Final Thought

*“Take time and energy to manage meetings effectively and your project, your organization and your customers will benefit in many ways”*