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Plan and Conduct Effective Meetings

24 Steps to Generate Meaningful Results

THE EMPLOYEE HANDBOOK FOR ENHANCING CORPORATE PERFORMANCE

Barbara J. Streibel

“Nobody knows when the first meeting took place or why, but it’s a safe bet that the meeting seemed too long to some participants, poorly organized to others, and boring to at least a few, and it’s likely that some were disappointed with the results.”

"The skill to manage a meeting . . . is perhaps the most critical asset in any career. . . . Most professionals . . . do not recognize the enormous impact their meetings have on their organizations and their careers."

—George David Kieffer,
The Strategy of Meetings

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Contents

Make meetings effective

Every meeting you hold costs time and money—sometimes a lot. Consider this book a small investment in improving the return on the time you and your people spend in meetings. Properly planned and conducted meetings can help you and all your employees work together more efficiently and with better coordination.

If you follow the basic principles and guidelines presented in this little book, you'll find it easy to improve your meetings. You and your people will find that meetings don't waste time but actually improve performance.

As it's used in this book, the term "meeting" refers to an event consisting of people, content, and process for a purpose. Because a meeting is basically a collaborative work process, the word "meeting" encompasses almost as many possibilities as the word "work."

There are many types of meetings that you as a manager might organize and/or facilitate, involving primarily your employees but perhaps including other employees and managers and even people from outside the organization. With this reality in mind, we frame our discussions in general terms, focusing on what all or most meetings have in common. We use the word "participants" to refer generally to the people who take part in a meeting. This word suggests an active contribution because we believe that the people invited to a meeting should be involved in it, not just be there.

This book will take you step by step through the process of a meeting, from start to finish and beyond. It reviews the impact of bad meetings, the factors that cause meetings to be bad, and the characteristics of good meetings. It outlines and discusses preparation. It explains how to start a meeting, including setting rules and assigning roles and responsibilities. It offers guidelines and suggestions for conducting a meeting, with a discussion of the problems that can arise and ways to deal with them. It explains how to close a meeting and how to follow up on the results. It recommends a selection of activities that can enable participants to work together more effectively and efficiently. It ends by discussing the use of technology in meetings and the issues involved in meeting virtually.

This book provides a brief coverage of meetings. We recommend that you read *The Manager's Guide to Effective Meetings* (McGraw-Hill, 2003), which provides more complete guidance in a form that's easy and enjoyable to read.

"By failing to prepare, you are preparing to fail."

—Benjamin Franklin

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☐ Accept mediocrity

☑ Use meetings smarter

When managers do not use meetings effectively, it can be bad for the managers, for their people, and for the organization. How bad?

What is the impact of not maximizing the potential of your people and not making the best use of their time and energy? What is the impact of showing weakness in managing people, time, and resources? What is the impact on your career? What is the impact on morale when employees feel that meetings are wasting their time and energy and taking them away from "real work"? What is the impact on the work environment when it seems that managers are not committed to working effectively and efficiently?

Bad meetings waste time, talent, and other resources. Bad meetings affect the climate and the culture of the organization. And if word gets outside the walls, there can be damage to the image of the organization. After all, bad management is bad management.

What are the benefits of good meetings?

Here are some of the things you can do with meetings:

- Share information—and learn from your employees—in a setting that allows and even encourages interaction.
- Answer questions.
- Ask questions.
- Discuss important issues and reach decisions as a group.
- Direct and coordinate the individual and joint efforts of your employees.
- Help your employees develop the ability to think critically.

- Draw on the experiences of your employees and others.
- Encourage your employees to raise questions and identify problems.
- Gain perspective on an issue.
- Observe how your employees interact.
- Help your employees work better as a team.
- Display and develop many of your managerial skills.
- Promote a sense of community.

These three recommendations will start you on your way to using meetings more effectively:

Do a cost-benefit analysis of your meetings: What are the costs in time and energy, in morale, in work attitude, in the impact on you and your career? What are the benefits?

Treat meetings like work: Encourage everyone to treat every meeting like any other essential work activity. Every participant should arrive knowing what the group is going to do, aware of what is expected of him or her, and prepared to contribute to the best of his or her ability.

Make a difference: Meetings can energize the participants, promote teamwork, and generate important results, or they can waste time and money and cause serious problems. Commit to reading this little book. Then commit to using the guidelines and recommendations.

"Meetings matter because that's where an organization's culture perpetuates itself. Meetings are how an organization says, 'You are a member.' . . . Bad meetings are a source of negative messages about our company and ourselves."

—William R. Daniels, senior consultant at American Consulting and Training, San Rafael, California

☑ Decide—to meet or not

"Is a meeting the best way to achieve what I want to achieve?" Always start with that question. Then go on to these questions:

- What do I want to do?
- What outcome(s) do I want?
- What is the best way to achieve the desired outcome(s)?
- Who is necessary?

If you don't have a purpose, don't hold a meeting. Is a meeting the best way to do what you have to do? Does it require involving other people? If so, in what way or ways?

Meetings can be *participatory* (involving input from others) and *nonparticipatory* (mostly one-way communication, both *informational* and *motivational*).

If your purpose is *informational*, consider alternatives for getting that information out. At least try to keep it short and/or make it interesting. A talking head is not a meeting.

If the purpose is *motivational*, start planning—but keep it short. Inspiration is usually best served in smaller doses.

If the purpose is *participatory*, think carefully about the methods you use and the people you invite. (We'll get to those questions later.)

What about meeting regularly? Regular meetings tend to become routine. Every meeting should interest the participants because of its purpose and the opportunity it gives them to make a difference. If this does not happen, you work harder and get less benefit.

Are you meeting to share information, make reports, and provide updates? If that is the case, try to replace or reduce those meetings by using e-mail or memos or *virtual* meetings.

If you're thinking about calling a meeting, consider the following three points:

Justify every meeting: If meetings are not required by organizational policy or a mandate from the top, set that rule for yourself. Your touchstone should be that basic question: What do you want the meeting to do?

Don't meet out of habit: If your answer to the question, "Why are you meeting?" is "Because we always meet on Monday mornings" or "Because it's been a month since we had a meeting," stop. Neither of those answers provides a purpose other than that you will be meeting for the purpose of meeting. That line of reasoning leads to mediocre meetings because it doesn't guide or inspire your preparation.

Think beyond your purpose: Sometimes a purpose that might not justify a meeting could be sufficient in certain situations. For example, in a company with a mushroom management style, it may be smart to hold meetings to provide information and/or hold discussions to empower employees and improve morale.

"It's as simple as this: When it is* not necessary *to hold a meeting, it is* necessary *to* not *hold a meeting."

Set goals, choose means

If you have a purpose for meeting, determine what you expect to achieve and how.

- What outcome(s) do you want?
- What's the best way to achieve the desired outcome(s)?

Set goals. Define your expectations. What outcomes will make the meeting a success?

For each purpose and each goal, choose an appropriate approach. You can think in the terms used by Michael Begeman, manager of the 3M Meeting Network:

- "Conversation for possibility"—to maximize creativity and generate ideas
- "Conversation for opportunity"—to narrow down a field of options by discussing, sharing information, analyzing, and taking positions
- "Conversation for action"—to make a decision and commit to taking action

Communicate your intent (purpose, goal, and approach) in the agenda. Then enforce the spirit of that "conversation" during the meeting. If the participants don't understand why and how you expect them to work, they may work in different directions and for different reasons.

Essential for any of the three "conversations" is *information.* For each item you schedule, designate someone to provide information and name that person on the agenda.

The information can be provided in advance (distributed with the agenda) or during the meeting (through brief comments, a presentation, and questions and answers). The method should be appropriate for the type and amount of information the participants will need to discuss effectively and efficiently and perhaps to reach a decision.

Here are three examples of conversations and suggestions for getting what you expect from them:

Communicate "possibility": If you want to meet to generate ideas, convey that intent. If you put on the agenda only "discuss ideas," some participants may expect to brainstorm, others may expect to debate, and still others may expect to be voting.

Communicate "opportunity": If you want to meet to identify alternatives to a current work process, convey that intent. If you put on the agenda only "consider options," some participants may expect a quick vote and others may be ready for a spirited debate.

Communicate "action": If you want to meet to vote on three proposals, convey that intent. If you put on the agenda only "talk about proposals," a few participants may want to make additional proposals, some may want to form a task force to study the proposals, and others may expect to reach a decision and then move on it.

"If you don't have purpose enough for a meeting, you can never do enough planning to compensate. The result would be only a well-planned waste of time and energy. As economist John Maynard Keynes noted, 'If a thing is not worth doing, it is not worth doing well.'"

☑ Decide how to decide

The process by which a decision is made affects the way people feel about the result. If you care how your employees feel and/or need their support for the decision and their commitment to act on it, you should think about how you want to make any decision you put on the agenda.

There are four basic ways to make decisions.

1. **Managerial.** It's sometimes appropriate—and certainly more efficient—to make decisions yourself. If you put a decision on the agenda, be clear that the purpose for discussing it is only exploratory and advisory, that the participants will not be making the decision.
2. **Vote by majority or plurality.** Traditionally, groups generally have made decisions by voting.
3. **Consensus.** This is the cooperative development of a decision that is acceptable enough for all the members of a group to agree to support it. The quintessential team approach, consensus is definitely the best way to reach some decisions.

   There are important advantages. Participants own the decision, which is not the case with managerial decisions. There are no "winners" and "losers" and no undermining of the decision as may be the case with decisions by vote.

   There are disadvantages. It's inappropriate when the decision involves specific simple choices. It can take a long time to achieve consensus—or even come close. It can be harder on some people than voting if personalities and group dynamics come into play.

4. **Delegation.** A fourth option is to give a group of people authority and responsibility.

   When you put any decision on the agenda, indicate "vote," "consensus," "managerial," or "delegation" so that the participants know in advance what to expect.

   Here are three suggestions to help you decide how to decide:

Vote under the following conditions: Vote if the time is limited, if there are differences among the participants that make consensus unlikely and it's more important to move forward than to resolve differences, or if the support of all the participants is not necessary to act on the decision.

Use consensus under the following conditions: Use consensus when decisions are important and/or of broad impact, when all or most of the participants are equally invested in the decision and are needed to take action on it, or when the exchange of ideas and perspectives would enrich the participants.

Delegate under the following conditions: Delegate when there are several individuals who generally are considered the best qualified to make the decision or who are the only people affected by the decision.

"Sometimes* how *you decide at a meeting may be just as important as* what *you decide."

☑ Schedule

Schedule only enough time to achieve your goals. Meetings generally should last no longer than an hour or 90 minutes. If you must schedule more time, allow breaks.

For each item, set a start time, a duration, and a stop time. First, if you think about each item, you'll estimate total time more accurately. Second, time allotments show that you've thought about each item, and so participants may take the agenda more seriously and work more efficiently. Third, with a more specific agenda map, you can conduct the meeting with more confidence and be better prepared and more in control.

Participatory activities—particularly those requiring discussion, creativity, and/or emotional involvement—can vary greatly in terms of time. You can't predict how people are going to work together: Sometimes there's synergy, and sometimes there's lethargy or antagonism. Allow extra time, especially for consensus decisions.

Try to structure the agenda to avoid getting bogged down in any activity or diverging from the items scheduled and to keep the participants from becoming bored, heating up, or burning out. There may be a natural flow of the items that makes sense. If there is not, you can alternate the items in terms of difficulty (hard/easy), time (long/short), energy (intensive/light), thinking (broader/narrower), and emotions (hot/cool).

After you have sequenced your business items, plan the ending. That means allotting 5 to 10 minutes or so to sum up the main points, the decisions, and the assignments and to evaluate the meeting.

Here are three things you should not do when scheduling your agenda:

Avoid the tyranny of 12 and 6: Many managers automatically allocate either 30 minutes or an hour when scheduling a meeting simply because that is what's commonly expected. Schedule to achieve your goals, not to fit the clock.

Prevent the "Parkinson puff": Set a time for the meeting to end. Remember the principle attributed to Cyril Northcote Parkinson: "Work expands so as to fill the time available for its completion."

Don't start with blah, blah, blah: Managers often put announcements first on their agendas. That's generally a bad strategy. It may lessen the initial feeling of community unless all the announcements are relevant to all the participants. It may distract participants from the agenda. It sends the message that it's not important to arrive on time. It starts the meeting with a one-way flow of information, which can make it difficult to transition into collaboration.

"Any meeting worth holding is worth planning. Good meetings start in advance—with good preparation."

☑ Pick and prepare

Invite to a meeting only the people needed to achieve your goals. For each person you are considering, ask, "How do I expect this person to contribute to the meeting?" If you don't know, don't invite that person. If you need people for only part of the meeting, invite them for that part.

A meeting is a very short-term project. What outcomes do you expect? Which employees or colleagues do you want on your team?

Do you want to share some information? You probably can do that better through memos or e-mail. Then people can attend the meeting to ask questions and/or discuss that information. Do you want to motivate? If that is the case, keep it short. The best leaders often do the most good in the fewest words.

Do you want to make decisions? How? If you want a vote, get it without a meeting. If you want a discussion, invite everybody just to discuss and vote. Do you want to gather input and/or generate ideas? Send an e-mail and find out who's interested in helping.

Assign responsibilities for the meeting. Designate roles such as facilitator, scribe, timekeeper, and note taker (we'll discuss these roles later in the book) and make sure those people understand their roles.

As you decide whom to invite, add up the hourly cost (compensation and benefits) of all the people on the list and multiply the total by the estimated duration in hours. What will the meeting cost? What return on that investment do you expect?

The benefits of meetings cannot all be measured financially. However, when you know the cost of a meeting, you will work smarter to make it more effective and efficient.

Here are three more recommendations for picking and preparing participants:

Get the information you need: If you ask participants to prepare information for a meeting, tell them what you expect (basic background? short report? full presentation?), why the others need the information, and how much time you're allotting. Suggest that they provide the information to the others in writing in advance.

Prohibit dumping: Don't have people present information in a meeting that they could have delivered more efficiently and more effectively in writing. Is that *effective*? Is that *efficient*?

Consider the political: If you invite only the people who are essential to the meeting, you will exclude enough people that none of them should take it personally. But if you invite any people who are not essential, you may feel pressure to invite everybody for fear of offending anybody.

"The length of a meeting rises with the square of the number of people present."

—Eileen Shanahan

Set the scene

When should you meet? Depending on the schedules of the people you are inviting, you may have few or no options. But if there's more than one time possible, consider the rhythms of your employees and the workplace.

Where should you meet? You may not have much choice, but to the extent that you can choose, here are some considerations.

The room should accommodate comfortably the number of people invited. It also should allow space for a facilitator to move around easily and a scribe with a flip chart or another display.

The room should allow for the proper seating, which significantly affects the dynamics and results. To promote interaction, the best arrangement is a circle, a square, or a U shape: These configurations give all the participants the same status and encourage all to contribute equally. A rectangular table tends to focus attention on the ends; if you use this configuration, put the scribe at one end.

Make sure that the room has adequate lighting, that the windows have blinds or curtains to reduce sunlight and other distractions, that the temperature can be maintained at a comfortable level, and that the room is properly ventilated. It also should have any equipment or other facilities that you need (for slides, video, audio, computers. etc.), including convenient power outlets.

After arranging for a location, finalize the agenda. The format doesn't matter much as long as it is organized and structured and indicates the outcomes desired, the items (in sufficient detail and plain language), the start and stop times for each item, and the persons responsible for providing information or leadership for each part of the agenda.

Here are three more suggestions for preparing properly:

Enable and encourage preparation: Get the agenda out to the participants far enough in advance that they have time to prepare appropriately. Include any materials needed to help them prepare. If you plan any participatory activities, provide whatever information they will need.

Display the agenda: Consider putting the agenda on a flip chart, a transparency, or slides to display during the meeting. With the agenda on display, it's easier for the facilitator to keep the meeting on track by simply gesturing toward the agenda item if participants begin to stray.

Prepare, practice, and pack: Prepare any materials: notes, handouts, audiovisuals. Practice using any equipment. Pack the materials so that you can find whatever you'll need as you need it. (A checklist is very valuable.)

"As a fellow manager once pointed out, 'You're calling on their brains, but they don't leave their butts behind.' To get the most out of the former, you've got to keep the latter comfortable."

☑ Assign roles

The participants should share the responsibility for running their meetings. That is a good way to encourage a greater sense of community and collaboration and help your employees develop their leadership skills. Sharing the responsibility also may make meetings easier for you.

Here are four roles to consider.

The *facilitator* runs the meeting, leading the participants through the agenda systematically and at an appropriate pace and encouraging full participation by all. This role requires leadership, quick understanding, tact, sensitivity, good communication skills, and a grasp of psychology.

The *scribe* posts key ideas, points, and comments during discussions on a flip chart, a whiteboard, or another means of display so that all the participants can refer to them. The scribe is responsible for displaying a "living record" of the progress of the group, noting all ideas, points, and comments accurately and summarizing all decisions in full sentences. The scribe should ask for clarification of any ideas, points, or comments that seem unclear; that will help the facilitator guide the discussion.

The *timekeeper* helps the group keep on track with the timing of the agenda during the meeting. When the time allocated for an item is almost up, he or she announces the time remaining. Then, when the time is up, he or she signals the facilitator. It is possible to do without this role: You or the facilitator can keep track of the time.

The *note taker* records the basics of the meeting—decisions, action items, open issues, and key discussion points—for a permanent record (the minutes). The note taker is responsible for finalizing and distributing the minutes.

To use roles most effectively, here are three recommendations:

Rotate the roles: If you meet with the same people regularly, share the responsibilities according to their abilities and interests. If possible, give every member of the group a chance to play each role. Rotation ensures each participant a chance to develop his or her skills.

Try not to intervene: A participant may not handle a role in a way that meets your expectations or the expectations of the group. Use your best judgment. It may be wisest to suggest that another participant help by assuming some of the responsibilities; be specific here.

Free the role players: Remind the role players that their responsibilities could inhibit their ability to contribute to discussions and other activities. If any participant with role responsibilities wants to engage more actively in a certain activity, appoint another participant to substitute for him or her during that activity.

"Recognize the principles of shared responsibility. We need to establish a different kind of culture where it's up to every person at the meeting to pull his or her weight to make it work."

—Eli Mina

Start right

Arrive a few minutes early. You may want to display the agenda or at least display the goal(s) of the meeting in a prominent place. Try to greet the participants as they arrive; that is an easy way to promote a feeling of collaboration and shared enthusiasm and energy.

The facilitator should start at the scheduled time. Except under extraordinary circumstances, delaying shows a lack of respect for those who are there on time and encourages participants to arrive late.

It's a good idea to begin with a *warm-up*: a quick round-the-group sharing of comments, questions, concerns, and information. It engages all participants collaboratively, focuses them, and sets the atmosphere for the meeting. For example, the facilitator could ask each participant to finish a clause such as "My hopes/concerns for this meeting are. . . ."

The success of a meeting depends on full participation. Meetings are work. You've selected the people who are essential. You also must develop the sense of community that will inspire every member to share the responsibility for making the meeting a success.

If the participants have worked together in meetings, the group already should have established ground rules: expectations for behavior. The facilitator may review them briefly before starting the agenda. If you don't have ground rules, the next lesson will help you set some. Then make sure that your ground rules work.

Here are three suggestions for dealing with special circumstances:

Be there, at least by proxy: If you can't get to the meeting on time, the facilitator should start the meeting without you. You've provided the agenda and any materials and delegated responsibilities, and so you're really not essential. As Kenneth Blanchard says in *Putting the One-Minute Manager to Work*, "As a manager the important thing is not what happens when you are there but what happens when you are not there."

Work around absences: If any participant responsible for an agenda item is not there in time for that item, the facilitator should try to rearrange the agenda to work around the absence. It may be necessary to reschedule that item. If that happens, apologize to the other participants for the inconvenience.

Start with introductions: If any of the participants don't know each other, the facilitator should start the warm-up by asking each person to provide some information, such as name, unit, job responsibilities, and reason for attending the meeting. Participants should feel like peers, a feeling that starts with introductions.

"There is a legitimate social component to meetings. Sure, we'd all rather be efficient than sloppy in our work. Sure, we'd all rather spend our time on 'real work' than on 'idle chitchat.' But you should never overlook the social side of work rituals—even in meetings that are 'all business.'"

—Michael Begeman

Agree on ground rules

Ground rules are agreements about behaviors. They should promote respect, collaboration, and efficiency without hindering spontaneity and creativity. Most people come to a meeting with expectations about behavior. Establishing ground rules is simply a matter of reaching agreement on regulating behavior to meet common expectations.

If you don't have rules, that should be the first item on the agenda. It's a good investment in encouraging interaction and developing a spirit of community. It's best if the participants develop the rules because they will be more likely to follow the rules if they all agree on them. The facilitator can start the discussion by asking, "What guidelines should we adopt so that our meetings benefit most from what we all have to offer?"

The discussion that generates the rules reveals values and emotions that can divide the participants or unite them. The way group members develop their rules shows a lot about the way they will work together.

The facilitator should help participants word their proposals and guide them through the decision process. As the members agree on a rule, the scribe records it on a flip chart or whiteboard. After the meeting, the scribe transfers the rules to a medium that enables you to bring them to every meeting, possibly to display them.

Groups typically consider the following issues: attendance, participation, role responsibilities, interruptions, respect, the discussion process, confidentiality, assignments, methods for evaluating meetings, and chronic violations of rules. The simpler the rules are, the easier it is to remember and follow them. Also, if a group gets bogged down in establishing rules, it sets a dangerous precedent for discussing other matters and it becomes easier for participants to obsess over rules and neglect the principles behind them.

Sometimes groups also decide on penalties for breaking the ground rules. To the extent possible, the group members should be responsible for enforcing their rules.

Here are three don'ts for ground rules:

Don't rush to rule: Don't assume that there should be a rule for every problem. The rules should be kept as simple as possible. The more rules there are, the easier it is for participants to neglect the principles behind them.

Don't punish with work: Don't allow the group to assign tasks as punishments. That sends the message that contributing to the group effort is something bad rather than a normal responsibility.

Don't deny democracy: Let the group members decide on the rules. Trust them to do it. They can always decide later to make changes. You want them to assume responsibility for themselves.

"For many situations that may arise during a meeting, the first and generally best remedy is the ground rules your group has set for its meetings."

Conduct the meeting

The facilitator should review the agenda to make sure that all the participants are on the same page—literally. The facilitator should explain the purpose of the meeting briefly and ask if there are any suggestions for changes in the agenda. If there are, the group will decide whether to revise the agenda or set aside the new item for another meeting.

The facilitator should follow the agenda unless circumstances dictate modifying the order of items. Your "meeting map" should be detailed enough to guide the facilitator, who is responsible for keeping discussions focused, managing participation, getting decisions (if appropriate), and planning actions (if appropriate).

The facilitator should prevent tangents that would not benefit the group and decide when to allow divergent thinking and useful contributions that may not seem directly relevant. If issues arise that call for deviations from the agenda, the facilitator should ask the permission from the group to allow a digression.

The facilitator should move at an appropriate pace and always be alert to signs to slow down or speed up. The facilitator should glance at the timekeeper regularly, ready for a signal to move toward a decision or to close the discussion and, finally, to end the meeting.

Here are three suggestions for making better use of time:

Make time obvious: Put a kitchen timer where all the participants can see it. Then, for each item, the facilitator can set it for the time allocated on the agenda to show that "the meter is running." Time is money, and meetings cost a lot of both. A timer is a very real reminder of this basic fact, and it makes the role of the timekeeper easier.

Avoid the "rush-hour syndrome": That is what Eli Mina, author of *The Complete Handbook of Business Meetings,* calls it when people try to squeeze too much agenda into too little time at the end of a meeting. With a timed agenda and a diligent timekeeper, the facilitator can lead the group to decide what items to conclude and what items to continue discussing at another meeting. It's more important for the group to be *effective* than for it to be *efficient.*

Don't let the clock run your meetings: Heed the old adage "If it's worth doing, it's worth doing well." The agenda schedule is not carved in stone, so don't allow it to be used to justify skimping on discussion or rushing a decision. Do it right—now or later, at another meeting.

"There are two types of conductors: One drives a train down the track, and the other manages to get all the instruments in the orchestra to play together. In conducting a meeting, a facilitator is expected to do both—keep to the schedule and help all members of the group work together."

Inform and discuss

The facilitator initiates each agenda item by stating the outcomes expected from the group. If someone is responsible for providing information, that comes next.

Avoid using meetings to provide a lot of information. The participants should receive the information in advance so that they arrive prepared to question, discuss, and decide.

The facilitator then asks for additional information or questions about the information. Any opinions and suggestions must wait for the discussion.

Some of the items to be discussed may not generate any discussion, and some items not scheduled for discussion may set the participants talking. The facilitator is responsible for handling unexpected situations. Refrain from intervening. Allow the group and the facilitator to decide how to proceed.

The facilitator opens the discussion. If participants are slow to contribute, it may be necessary to ask open-ended questions, draw out contributions, and ask follow-up questions. The facilitator should ask the participants to clarify their contributions as necessary—to restate, define terms, explain, or provide reasons, facts, or examples—and prevent digressions.

The facilitator should scan the faces of the participants, attentive to signs that somebody is not understanding something. If that is the case, he or she should clarify the issue.

The scribe records the main points of the discussion on a flip chart or another medium and put them on display. He or she should reduce contributions to their essence but keep the key words used by the contributor.

Here are three ways to encourage discussion:

Prepare questions: If you anticipate that it may be difficult for the facilitator to start a discussion, jot down a few open-ended questions so that the facilitator is prepared for that possibility.

Allow anonymity: If the participants hesitate to discuss a sensitive issue, the facilitator can try this technique: He or she distributes index cards and asks the participants to note any comments or ideas. Then the facilitator collects the cards, shuffles them, and distributes them. The participants read the cards aloud one by one. That process may generate reactions. Even if it does not, at least it has elicited the comments and ideas that a discussion would have generated.

Work in small groups: If the participants are worried about expressing themselves well, the facilitator can form groups of two or three and give each group an index card to record thoughts or concerns. The people in each cluster work together through any difficulties in expressing what's on their minds. Then the facilitator collects the cards and reads them aloud, resolving any wording problems.

"To conduct a discussion properly, the facilitator must . . . open the discussion, manage participation, keep the discussion focused, and close the discussion. It's so simple—on paper."

☑ Direct traffic

The facilitator should ensure that each person has an opportunity to contribute, prevent any person from dominating, and engage all the participants in collaborating.

You can encourage every participant to take responsibility by attaching copies of this guide to the agenda.

Your Job Responsibilities

- Read the agenda carefully before the meeting.
- Prepare to work toward the objectives.
- Contribute and encourage others to contribute.
- Pay attention to what others contribute and respect them.

The facilitator should encourage differences of perspective and opinion and ensure that everyone understands each contribution. The facilitator directs traffic, working with the scribe to keep the discussion focused and progressing toward the objectives.

However, if opportunities arise, don't miss them. If an idea or a suggestion is good but not germane to the discussion, the facilitator should signal the scribe to save it in the *parking lot*: a separate page of a flip chart, for example, for contributions that otherwise could lead to tangents.

Each participant brings different experiences, abilities, and perspectives to the table. A meeting is often the ultimate in teamwork. The greatest danger is not *conflict*, but *groupthink*: the tendency of a group of people to agree regardless of the facts. Discourage groupthink by emphasizing the value of critical thinking, disagreement, and diversity of thinking.

The facilitator brings the discussion to a close when the timekeeper indicates or the discussion becomes less productive. The facilitator then moves on to the next step.

Here are three ways to improve discussions:

Save time with thumbs: If a discussion slows, the facilitator should check whether to move on. A good way to do this is to have the participants to signal: thumbs up—"I'm ready for closure," thumbs down—"I still have serious concerns," or thumbs sideways—"I'm neutral: close or continue." If any thumbs are down, the facilitator should ask about the concerns.

Drive the vehicles in your parking lot: Do something with those contributions. Some may not be worth pursuing, but others may belong on a meeting agenda at some point. A parking lot is like a suggestion box: It can generate great opportunities for managers smart enough to use the contributions.

Prevent groupthink: Encourage the group members to raise objections and concerns. Promote an environment that is open to questions and alternative perspectives. Divide the group into smaller groups to discuss those items and then compare the results. Have the members develop criteria for evaluating options and then use those criteria.

> ***"The discussions should be civilized and respectful: hard on the issues, but soft on the people."***
>
> ***—Eli Mina***

☐ Treat all people the same

☑ Work with styles

People work in various ways. To improve interactions, managers and facilitators should understand the basics of *team player styles*. In his book *Team Players and Teamwork*, Glenn M. Parker discusses four team player styles that are essential to any team:

Contributor: Provides information and focuses the group on the task at hand.

Positive: dependable, responsible, organized, efficient, logical, clear, relevant, pragmatic, systematic

Negative: shortsighted, compulsive, preoccupied with facts, uncreative, perfectionist

Collaborator: Provides a sense of purpose, gets the group to set goals, and emphasizes overall purpose.

Positive: cooperative, flexible, confident, focused on the future, conceptual, accommodating, generous, open, visionary, imaginative

Negative: overly committed, overly involved, too global, overly ambitious, insensitive

Communicator: Attends to "people issues" and helps the group address matters of process.

Positive: supportive, encouraging, relaxed, informal, spontaneous, helpful, friendly, patient, considerate, tactful

Negative: aimless, foolish, placating, impractical, manipulative

Challenger: Encourages the group to question its methods and goals, asks tough questions, and pushes the team to take reasonable risks.

Positive: candid, questioning, outspoken, straightforward, ethical, honest, truthful, principled, adventurous, brave

Negative: rigid, arrogant, self-righteous, contentious, quibbling

A facilitator who can identify the characteristics of team player styles can build on the positive.

In problem situations, the facilitator can encourage participants whose styles can help most naturally:

- If the group is getting caught up in digressions—Collaborators
- If a discussion seems to too soft, not probing and questioning—Challengers
- If emotions are rising and straining collaboration—Communicators
- If the discussion is becoming abstract—Contributors

Here are three suggestions for getting the greatest benefit from personal differences:

Lend a hand: If the pace is too slow (the participants seem bored or impatient) or too fast (the participants are having trouble contributing or following), signal the facilitator with a small gesture. If pacing is a consistent problem in your meetings, you may need to allocate time more appropriately.

Promote participation through advocacy: Ask each participant to represent a constituency or an attitude (act as a skeptic, an optimist, a pragmatist, a pessimist, and so on). The person is responsible for participating from the perspective of that constituency or role.

Help people keep on the ball: Do participants tend to talk over each other? Give the facilitator a foam ball. When a discussion opens, the facilitator tosses the ball to the first person who wants to contribute. Then that person tosses the ball to the next person who signals. Whoever has the ball has the floor.

"Contributors, Collaborators, Communicators, or Challengers: each of these . . . team player styles . . . has a unique set of strengths."

—Glenn M. Parker

☐ Talk the issue to death

☑ Get a decision

For most agenda items, the purpose of a discussion is to arrive at a decision—even if that decision is only to consider the items further at another time. In fact, it could be argued that no meeting should end without a decision.

If you're making the decision yourself, let the participants know what you expect from them before the discussion starts. Do you want them to explore options for you to consider? Do you want them to discuss a tentative decision?

If you're delegating the decision, you should explain why you're choosing certain people to make it. Do you consider them the best qualified to make the decision? Are they the ones affected most by the decision?

If the participants are making the decision by vote or by consensus, the facilitator must check the decision first so that all the participants understand what they're doing. The facilitator states the decision in full sentences and explains what it means.

What if the participants can't reach a decision? That depends on the situation.

If they've considered the issue thoroughly and especially if time is short, you may choose to make the decision. However, if you believe that the group would benefit from considering the issue further, it may be smart to postpone the decision.

A decision means little if it doesn't result in action. The next step is for the facilitator to help the group determine what action to take, the approach, the time frame, the person or people to be responsible for the action, and the specific results expected from the action.

Here are three more points about making decisions:

Ensure secrecy for voting: It's often easier on participants if they don't have to vote by a show of hands. A private vote takes only a minute or two longer. The facilitator gives each participant an index card on which to vote. The facilitator collects the cards and then reads each one, and the scribe tallies the votes.

Get input: If the participants can't reach a decision and you decide to allow more time for discussion, the facilitator should ask the participants to gather input from others. Sometimes a little information or another perspective can save a lot of time and effort.

Assign to a person, not a group: It's best to assign a specific task to a specific person rather than assigning an area of responsibility to a team. If possible, avoid "action by committee."

"A meeting is just a gathering of bodies if there's no meeting of the minds."

—Carolyn B. Thompson,
Interviewing Skills for Managers

Close the meeting

No matter how well a meeting goes, it's better if it ends right.

End it on time even if it starts late. The participants have schedules to keep and other work to do. Ending on time shows consideration and encourages the participants to work efficiently.

The facilitator should summarize the main points, decisions, actions, and assignments. The participants should know whether they have achieved the objectives for the meeting and what they are going to do next. That gives them a feeling of closure and accomplishment that encourages a greater commitment to action.

The assignments naturally will go onto the agenda for the next meeting to follow up on those which are scheduled to be completed by then and get a progress report on any others. You'll also schedule any unfinished business.

Should the facilitator also schedule the next meeting? That sometimes is a good idea, especially with a project team or a task force and long-term goals. But ending a meeting by scheduling a meeting can develop into a routine of meetings to motivate people to complete their assignments. That is a bad habit and an expensive incentive.

You have the time frame for the assignments. You can wait to schedule a meeting according to the progress of the people responsible.

The facilitator should thank any person who presented, the scribe, the timekeeper, the note taker, any person assigned to a task, and all the participants. It's always good to show appreciation. Those who've done their best deserve thanks, and those who haven't contributed enough may feel compelled to do better the next time.

Your meetings will end better if you do these three things:

End meetings on time: There's another reason to end on schedule. It can seem like poor management if you can't plan enough time to achieve your objectives or get your team to work effectively and efficiently enough.

End right, not rushed: It takes a few minutes to end a meeting well. But it's better than feeling hurried and frustrated and disappointed, which is often the result when meetings run long.

Thank the participants personally: Even if you have a facilitator conduct the meeting, you should thank the participants yourself. After the facilitator thanks them, you can stand up and express your appreciation. You also can thank them individually after the meeting ends. Be sincere and, if possible, specific.

"One of the biggest problems with meetings is that there's a lot of talk but not much action afterwards or even too much action and too few results."

☑ Evaluate

If you don't evaluate your meetings, you're not likely to improve them.

The way you evaluate a meeting depends on the purposes, the participants, and any problems.

Here's a quick, simple method. The facilitator mentions aspects of the meeting one by one, for example, agenda, pace, and atmosphere. For each aspect, the participants indicate thumbs up, thumbs down, or thumbs sideways. The facilitator then asks the thumbs-down voters for their reasons and asks the group for recommendations.

A more open method is to ask each participant in turn for comments. The facilitator also can ask questions, both general and specific.

If you use an oral method, the scribe should record all comments and suggestions. The group should end by agreeing on one thing to improve the next meeting.

You may prefer to have evaluations in writing. In that case you can distribute a sheet with statements and ask the participants to indicate their reaction to each statement: yes/no or on a scale from one to five. Here are some sample statements:

- I had enough time to prepare adequately.
- The agenda was organized well and specific.
- I knew the purposes for the meeting.
- I felt free to contribute.
- Participants showed respect for one another.

- The facilitator used questions well.
- The pace was appropriate.

Open-ended questions require more time and energy from the participants but usually provide more information. Have the facilitator pass around index cards and ask three questions about the meeting:

- What did you like most?
- What did you like least?
- How could we improve?

These examples are basic. You also can ask more focused questions.

What if time runs out before any evaluation? Distribute a written evaluation to all the participants by e-mail or memo immediately after the meeting. Specify a deadline.

Here are three suggestions for more effective evaluation:

Evaluate the role players: The facilitator, the scribe, and the timekeeper are responsible for making the meeting work. Include them in your evaluations, at least the first few times, to help all group members better understand the responsibilities and challenges of each role.

Just ask: Which approach to evaluation is better, oral or written? Which type of questions, general or specific? If you're unsure, ask the participants. After all, it's their meeting, too.

Close strong: Thank the participants for helping you make meetings more effective. That's what they're doing by evaluating the meeting—if you use their evaluations. Express your appreciation sincerely.

"Evaluating every meeting is key to having effective meetings."

—Peter R. Scholtes, Brian L. Joiner, and Barbara J. Streibel, **The Team Handbook**

Provide minutes

The minutes of a meeting can document what happened and what's scheduled to happen more effectively when they focus on *action.* Action minutes are basically lists, not narratives. They should show agenda items, decisions, actions planned, results expected, time frame, and persons responsible for those actions:

1. Date, time, and location of meeting
2. Participants
3. People invited but absent
4. Facilitator, scribe, timekeeper, and note taker
5. Agenda—for each item:
   - Main points and outcomes (decisions and actions)
   - Persons responsible for actions, time frame
   - Results expected
6. Items for later meetings
7. Evaluation
8. Reports (attached)

You should determine the format as early as possible so that your note takers can document your meetings with consistency.

Your note taker should distribute the minutes *as soon as possible.* A deadline shows the importance of meetings and assignments.

This job is simple. Since the note taker was recording the main points during the meeting, the minutes are almost done by the close. He or she finalizes them, prints them, gathers any materials presented at the meeting, makes copies, and distributes it all. Let him or her know who should receive the minutes.

It's even easier if the note taker used a laptop computer to take notes, if files can be shared by e-mail or through an intranet, and if the minutes and other materials can be distributed electronically.

Here are three more points about minutes:

Check now or regret it later: The minutes are important, and so inaccurate or incomplete information can be dangerous. It's smart to ask the note taker to give you the minutes to review before he or she distributes them. It's not a question of not trusting the note taker but an acknowledgment of the importance of the minutes. It takes just a few minutes to avoid problems and embarrassment.

Spread the words: Distribute the minutes to all the meeting participants, of course, and to any other interested parties. That could include anybody who received the agenda, the supervisors of any participants responsible for assignments (because those assignments will take time and effort away from their other work), the supervisors of all the participants, and any manager or other employee who will be involved in the assignments in some way.

Approve it or not: It may not be necessary to approve the minutes formally at the next meeting. Of course, the participants may agree on an approval process. Encourage the participants to review the minutes when they receive them and then bring any questions or concerns to your attention.

"A meeting is an event at which minutes are kept and hours are lost."

—Anonymous

☑ Work and improve

After the meeting, the work continues as the people responsible for action items do their assignments. Provide support. It may be smart to ask other members of the group to lend a hand.

Part of that ongoing support is communicating about the meeting, decisions, actions, and accomplishments. Keep stakeholders informed about progress on action plans. Then, when those action plans produce results, put out a summary report. Credit the persons responsible, of course, and express thanks to all the participants in the meetings who developed those action plans.

The last assignment of a meeting is for you: Improve future meetings. That's as important as improving the performance of any other work process.

Consider any concerns and suggestions expressed in the evaluations. Form a task group to review the evaluations and any suggestions and generate ideas for improving your meetings. Develop a special evaluation to focus on certain points and elicit recommendations at the next meeting.

Are there problems with the agendas? If there are, ask group members to mark up copies of a recent agenda with comments. Then involve some of them when you develop the next few agendas.

If meetings have suffered because of behavior problems, meet with the individuals involved. Focus on helping them understand that all the participants benefit when they show respect for others, follow the rules, and express their differences in a civil manner.

If there are problems with the roles of facilitator, scribe, timekeeper, and note taker, here are three suggestions:

Provide training: Gather your people for a training session. Explain the responsibilities of each role. Answer any questions. Then stage some short role-play situations. You can play the part of the group, causing problems to test the people acting as facilitator, scribe, timekeeper, and note taker. This is also a good way to help the "teams" develop coordination.

Prepare personally: Work a little with the people to whom you assign the roles in advance of the meeting. Run through the agenda and discuss any situations that seem likely to arise. You also can emphasize the need for the role players to work as a team.

Support with signals: During the meeting, help your facilitator (and the three others, if necessary) by sending signals. Some gestures are common forms of communication, such as giving a "thumbs-up," nodding, and shaking your head. You could agree on other gestures to signal a person to slow down or pick up the pace, to clarify, or to ask questions.

"Keep the people who participated in the meeting collaborating after the meeting."

Identify causes

If you're meeting to solve a problem, the first step is to identify the causes. Two effective activities are *repetitive why analysis* and *cause-and-effect analysis.*

Repetitive why analysis is simple. Ask "Why?" about the problem, then "Why?" about the answer, then "Why?" about the next answer, and so on, until you reach the root cause.

Here are some examples:

"Why was the report late?"
"I had trouble using the software."

"Why did you have trouble using the software?"
"I couldn't find the manual."

"Why couldn't you find the manual?"
"It floats around."

"Why does it float around?"
"There's no one central place to keep manuals."

A version of this technique is the *five whys*—probing to five levels.

Cause-and-effect analysis is better for problems with interrelated causes because it structures the relationships.

First, define the problem. Draw a horizontal line. Label either end with the problem (effect). Then identify the primary (direct) causes. For each one, draw a diagonal line from either side of the horizontal line and label it with the cause. (The diagram will resemble a fish skeleton. This *fishbone* diagram is also known as an *Ishikawa* diagram after the person credited with creating it.) If a primary cause is the effect of another cause, put the secondary cause on a horizontal line from the primary cause diagonal. For any cause of a secondary cause, draw a diagonal line from the secondary cause horizontal line for the tertiary cause.

Here are three suggestions for using these techniques:

Promote comfort: It's not enough to choose techniques and tools appropriate to your purposes. You also need a suitable environment. The participants should feel comfortable with one another and with the activities. The facilitator should start by explaining the rules. Even more important, especially for activities that involve creativity or critical thinking, the participants should feel free to offer suggestions and express opinions.

Understand the techniques: Know how and why they work. Know which techniques and tools work for which purposes in which situations. Use them. That may seem obvious, but some people use techniques and tools as if they were magic.

Stimulate and support thinking: When identifying causes, people often use organizational schemes such as methods, materials, machines, manpower (or people) (the four M's); place(s), procedure(s), people, policies (the four P's); or surroundings, suppliers, system(s), skills (the four S's).

The techniques and tools . . . can be very useful—or a waste of time and effort. That depends on the extent to which the tool or technique you choose to use fits your need as well as on how you use it."

Go with the first idea

Get lots of ideas

Two good activities for generating ideas are brainstorming and mind mapping.

Brainstorming encourages creativity by separating creativity and analysis. The purpose is to generate a lot of ideas.

The facilitator explains the topic and displays it. The participants think for a few minutes, and then the facilitator invites ideas.

The participants can contribute one by one, in order, passing if they have nothing to contribute. When everyone passes for a round, the session ends. Alternatively, the participants can call out their ideas as they come until they have nothing left to contribute.

The facilitator should explain and enforce the principles:

- Feel totally free to contribute any ideas.
- Treat everyone with respect.
- Don't react to any ideas.
- Don't interrupt.
- Build on ideas.
- Keep focused on the topic.

After brainstorming, break to allow the participants to recuperate and prepare to think analytically.

Mind mapping helps a group capture complex ideas quickly, easily, and visually to see the big picture and identify relationships among ideas.

Choose a central idea or concept as a starting point. The scribe writes this focus in the middle of a display. Set a time limit, such as five to seven minutes.

The facilitator elicits contributions inspired by the focus. The participants contribute freely without making judgments. The scribe captures the contributions on the display, drawing lines out from the focus and recording each contribution in one or two words or abbreviations or a sketch—whatever works. If a contribution relates to another one on the display rather than to the focus, the scribe records it on a branch from that contribution. If any area of the map becomes too dense, the scribe can start a map for that area on another display.

Mind mapping is an exploratory tool that is followed by analysis.

Here are three suggestions for better brainstorming:

Start quietly: If any group members tend to be quiet, try "quiet brainstorming." The participants take five minutes to jot down ideas. Then each person shares his or her ideas and the group transitions into spontaneous brainstorming.

Make it easier on the scribe: This variation is more efficient if the group later will be using an affinity diagram. Each participant who contributes an idea writes it on a large sticky note, which the scribe places on the display.

Keep it free: Brainstorming works when the participants feel free. To discourage reactions, pass around red cards or cards marked "Stop!" for participants to hold up if anybody reacts to their contributions.

"It is easier to tone down a wild idea than to think up a new one."

—Alex F. Osborn

Evaluate options

After the group has generated ideas, the next step is to organize, analyze, and evaluate them.

An *affinity diagram* is a technique for organizing ideas, concepts, or issues. The participants put each item on a sticky note or index card. Then they take the items to a board, wall, or table and silently arrange them into logical clusters until they arrive at a consensus. If an item fits into more than one cluster, they make a duplicate.

The facilitator reads the items from one cluster at a time and asks for a label (usually three to five words) for that cluster. The group may combine similar clusters or split large clusters. Then the participants discuss the clusters and the ways the items are interrelated.

PMI is a simple tool for weighing the pros and cons of actions (yes or no) or alternatives.

The scribe draws three columns headed "Plus," "Minus," and "Interesting." Then the participants come up with points about the alternative—positive, negative, or other ("Interesting").

It may become obvious whether the pluses or minuses prevail by the number of points and the importance. If it is not, the group continues. The members consider each Plus or Minus point and assign a numerical score for importance. Then they consider the points under "Interesting." If the discussion does not lead to a decision, the group can compare the totals of point values to reach a decision.

The *effort-impact matrix* or *grid* is basically a simplified graphic cost-benefit analysis that is used when the top criteria for a decision are the effort (time, money, difficulty) needed for an action and the impact (effectiveness) expected from it and when there are few possibilities to consider.

First, the group decides which matters more, effort or impact, and by how much. Then the scribe draws a horizontal line—the impact continuum—and an intersecting vertical line—the effort continuum. The group plots each choice along both continua, which puts the choices within one of four quadrants: low effort, high impact; high effort, high impact; low effort, low impact; and high effort, low impact.

Here are three ways to work with ideas generated by the group:

Organize ideas: Use an affinity diagram. It's a good way to discover key themes and issues.

Analyze alternatives: Use PMI. It's a simple way to expose positives and negatives.

Evaluate choices: Use an effort-impact matrix. It shows how multiple factors translate into the bottom line.

"Perhaps the most neglected yet important aspect of promoting better interaction . . . is to invite to the meeting individuals with diverse perspectives, a range of experiences, and different thinking styles."

☑ Decide and plan

Arriving at a decision that all participants accept and support can be difficult.

Grid analysis is especially effective when there are numerous options and criteria.

The scribe creates a grid, listing the options as rows and the criteria as columns. The participants weight each criterion for its importance; the scribe puts each weight with the criterion column heading.

Then the participants rate each option for each criterion from 0 (poor) to 3 (very good); the scribe puts each rating in each cell. Next, the scribe multiplies each rating by each weight, puts that score in the cell, and totals the scores for each option.

Multivoting works well when options are more difficult to rate by criteria.

The scribe displays the options. The facilitator determines how many votes to allow each participant. For each option, the participants vote by raising their hands; the scribe records the number. The options then are ranked by number of votes. If another round of voting is necessary, the group can drop options with fewer votes.

Nominal group technique is used to generate ideas or solutions and prioritize them.

The facilitator states the issue or problem, and the scribe writes it on the display. Then the participants brainstorm and the scribe records their contributions. Next, the facilitator reads each contribution and makes sure that everybody understands it. The group can combine similar contributions if all the participants agree. The scribe should number (consecutively) each surviving contribution.

The facilitator gives each participant five index cards. They each write down the five contributions that they consider the best, one per card, and then assign points to each, from five for the best to one for the last, putting the score in the lower right corner of the card.

The facilitator collects the cards, shuffles them, and then reads each score. On the display, the scribe records the scores. Then the facilitator adds up the scores, and the scribe records the totals.

Here are three more points about deciding on options:

Don't let numbers decide: Grid analysis is just analysis. You should discuss the winning option to ensure that it's the best choice.

Adjust for your situation: In multivoting, the number of votes allowed is generally a third of the number of choices. You can allow fewer for faster results or more if discussion reveals that voting may be difficult.

Go nominal: Nominal group technique can improve discussions. It gives all the participants an equal opportunity. It encourages more passive participants to participate. It allows the group to reach agreement faster.

"We're all familiar with the saying 'If all you have is a hammer, everything looks like a nail.' If you're using only one tool or technique, the odds are pretty good you're using it wrong sometimes."

☑ Meet virtually

Our definition of a meeting is *an event consisting of people, content, and process for a purpose.* Technology is expanding the concept of meetings as it changes how people communicate and collaborate. People can meet even when they are not in the same place at the same time. And by expanding the possibilities, technology challenges people to think differently about meetings.

Any discussion of technology can be overwhelming. Focus on what it can mean to *you* in terms of three factors:

- What restrictions can you overcome?
- What do you lose for that freedom?
- How can you compensate for what you lose?

Technology enables us to bring together people who are separated by space or time, such as employees who work in several locations and/or at different times. Technology enables us to save time, reduce expenses, minimize inconvenience, and be more productive.

Virtual meetings may sharpen the sense of purpose because they generally require more focus and more discipline. They also reduce the opportunity for socializing. Virtual meetings may make participants more objective because they feel the presence of others less than they do in face-to-face meetings.

But there are also disadvantages. The most obvious is that group dynamics and individual dynamics are different. Virtual meetings can work well for smaller groups, but they're more difficult with more participants, especially for interactivity techniques.

In using technology to meet or to avoid meeting, here are three recommendations:

Focus on purposes, people, and processes: In evaluating ways to meet virtually or avoid meetings, think as you would when considering meeting conventionally. Determine your purposes, decide on the people necessary, and choose the most effective and efficient ways for the people to achieve the purposes.

Do the math: In a survey, senior and middle managers said that only 56 percent of meetings were productive and that phone calls, memos, e-mails, or voice mails could have replaced over 25 percent of the meetings. What would the percentages be in your organization and your unit? How could you be using technology to be more effective and efficient?

Consider the essential requirements: Sales reps and technicians talk about requirements for an application or a system. But the requirements to consider above all are the psychological, emotional, and social requirements of your employees. What do they need if you use technology to meet virtually? The answers to this question are not on a Web site or in a brochure. They're in what you know about your employees and your workplace culture.

"Be prepared to be overwhelmed by the possibilities and keep in mind that no technology will guarantee better meetings—or even meetings that are as good."

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"Sometimes it's impossible to prepare adequately. . . . But don't allow one bad meeting to be followed by another. . . . Bad meetings usually lead to worse meetings. . . . Everybody tends to develop a fatalistic attitude toward meetings—and that can be a tough attitude to break. So, bad meetings usually lead to worse meetings. The reverse is also true: good meetings often lead to better meetings. And good meetings start in advance—with good preparation."

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