PLANNING more MEANINGFUL meetings

BY LAURA LARSEN
We’ve all been there: the meeting that didn’t start on time, had no focus, and could have been resolved through an e-mail. It’s not just you; research suggests that poorly planned meetings are a waste of time and resources. Employees consider between one quarter and three quarters of their time spent in meetings wasted. On average, employees spend more than 20 hours a month in meetings, which might not include prep time.

Imagine the time and money that could be saved and the improvement to employee morale that could be achieved by getting better value for meeting time. Employees might be able to gain the equivalent of roughly two more days of work time per person per month by eliminating wasted meeting time. Research also indicates that more productive and meaningful meetings can boost the quality of the decisions made there.

The secret to a meaningful meeting has as much to do with the format and preparation as it does the content itself. In order to get the most out of meetings, be clear about what the meeting participants expect and create an environment where individuals have space to share insights and provide meaningful feedback.

Finance professionals often lead processes that involve many other people, so effective meetings are critically important to fulfilling deadlines. This article examines the elements of a meeting — its organization, the roles of participants, its ground rules, and action items — that come together to create an environment where staff members feel engaged in the decision-making process.

**ORGANIZATION AND PLANNING**

A successful meeting begins with a clear sense of purpose. Explicitly stated objectives ensure that the correct individuals are in attendance; having the right mix of people ensures that participants are invested and engaged in the topic at hand. It is sometimes appropriate to allow optional participation by giving participants the opportunity to self-select, based on their determination of what they will be able to contribute to the dialogue.

These steps can be accomplished by drafting a detailed agenda and sharing it with participants at least 24 hours before the meeting. Effective agendas include the following components:

- **Objectives:** Define why the meeting is being held.
- **Logistics:** State start and stop times, location, etc.
- **Participants:** Create a list of people, including whether or not their attendance is required or optional.
- **Preparation:** Inform participants about any tasks (including reading) that must be completed before the meeting.
- **Agenda items:** Outline how the meeting objective will be accomplished. Each agenda item should include an expected duration and indicate who will lead the discussion for that item.

When drafting the agenda, keep the meeting objectives foremost in your thoughts. The objectives should be organized logically, and the other meeting components should contribute to reaching the objectives. Also consider if a meeting is the best way to achieve those objectives — if you aren’t able to define a clear and compelling objective for your meeting, it probably isn’t necessary.

In the City of Madison, Wisconsin, for example, city officials applied this standard to a long-standing meeting between the mayor and staff that covered updates on ad hoc projects. As the steering committee set out to develop an agenda format, it became apparent the existing structure lacked a clear objective. Rather than continuing a meeting that lacked direction, staff worked to retool the format and ensure that meetings only take place when there is a clear objective (which the mayor now decides).

Staff in the City of Burnsville, Minnesota, had a similar experience when applying this approach to a monthly department head meeting. Participants often lacked a clear understanding of the meeting goal and felt overwhelmed by an overly ambitious agenda. The meetings were cut back to every other month, with an agreement that a meeting would be scheduled if substantive discussion were needed.
ASSIGNING ROLES TO PARTICIPANTS

In this section, we examine ways in which participants can make meetings more effective. Four key roles — leader, facilitator, recorder, and coordinator — will assist with the organization, execution, and outcome. The number of attendees and the dynamics of the group will ultimately determine whether some of these roles can be combined or if they are even necessary.

**Leader.** The leader organizes the meeting and owns the agenda. This is the person who develops the agenda, often with the input of the other meeting attendees, establishes the timeframe for each item on the agenda, and articulates objectives and expected outcomes. This is important work that must occur before the meeting starts to keep it on topic and running smoothly. During the meeting, the leader manages the agenda and the time spent on each topic and, along with the facilitator, makes sure the ground rules are followed. The leader also makes any assignments that come from the meeting; this includes ensuring that assignments are given to the people most likely to succeed with them — which can be especially challenging for cross-departmental meetings, since attendees from different areas may not agree on what department is ultimately responsible for the task.

**Facilitator.** In smaller meetings, one person might take the roles of both the facilitator and leader. In larger meetings, or meetings about controversial topics, the facilitator’s role is critical, especially if the meeting leader is perceived to have a bias toward a certain outcome. While the leader manages the agenda and keeps it on track from a timing perspective, the facilitator manages the people (and personalities). This means ensuring that one or two loud voices don’t dominate the discussion and keeping everyone engaged and participating. That includes encouraging those who don’t typically participate. Personality issues can distract attendees from the meeting’s goals, so a good facilitator can make the difference between a successful and unsuccessful meeting.

**Recorder.** The role of the recorder can be difficult to properly define. He or she is expected to capture highlights of key discussion and decisions, which can result in a robust set of meeting minutes — but at a cost. First, to keep the momentum going and ensure that assigned tasks are completed by established deadlines, the recorder needs to provide meeting notes to all attendees within one business day of the meeting. Producing an extremely detailed set of minutes makes this difficult. Second, the person taking the minutes cannot provide optimal input as a meeting participant if he or she is preoccupied with capturing minute details of the meeting. To allow the recorder to both produce a record of the meeting in timely fashion and participate fully in the meeting itself, that person should focus on summarizing each agenda item at a high level, capturing the decisions that were made and clearly documenting any action items, rather than attempting to document everything that is said verbatim.

**Coordinator.** The coordinator takes care of the logistics associated with the meeting, such as securing a meeting space that will adequately accommodate the attendees, ensuring that the technology is in place (e.g., audio-video, projectors, microphones), coordinating with speakers or other meeting guests, and handling any other pre-meeting tasks (e.g., procuring refreshments). This role involves scheduling the meeting and ensuring that materials are distributed to attendees in advance. As we all know from experience, a meeting that is delayed due to poor coordination, like malfunctioning audio-video or the a too-small conference room, gets off track quickly and may have trouble recovering. No meeting time should be spent on items that should have been ready in advance.

MEETING GUIDELINES

Guidelines help cultivate a space where participants can speak freely and work creatively. Meeting rules make sure participants feel that their time and opinions are being respected by other members of the group. To ensure that all attendees are committed to the following the rules, spend time before the meeting establishing rules as a group (or for a recurring meeting, during one of the initial meetings). After guidelines are established, participants can be quickly reminded of them at the beginning of future meetings. The
following list includes suggested guidelines, based on the experiences of four cities — San Mateo, California; Burnsville; Portland, Oregon; and Madison, Wisconsin — that field tested the methods explored in this article.

**Be on time, or let the organizer know if you will be late.** Start and end the meeting on time. When you consider the total compensation of all people taking part in even a moderately sized meeting, the cost of wasting time by starting late is considerable. Just as the meeting attendees should respect the start time, so the organizer should make every effort to start and end the proceedings on schedule.

**Be prepared and attentive.** Meeting attendees should commit to doing any readings or other tasks that are a prerequisite for accomplishing the meeting’s objectives. The meeting organizer should commit to clearly delineating what these tasks are in the agenda and sending the agenda out with enough lead time for attendees to do their part. Once the meeting begins, all attendants should commit to giving their full attention and avoid doing other work (e.g., checking e-mail).

**Take the time to accurately absorb the perspectives of other attendees.** A prerequisite for good group interaction is for the members of the group to accurately understand each other’s viewpoints. For example, if the purpose of a meeting is to forecast hotel tax revenue, and a participant thinks that tourism will decrease next year, each attendee should be able to restate that argument in their own words, in a way that the person who originally expressed the opinion would agree with. Understanding the perspective of others helps prevent groups from getting into personality conflicts.

**Practice the art of precision questioning.** Understanding another person’s perspective does not mean you have to agree with it. How disagreement is expressed makes a big difference in whether a meeting is productive or destructive. When one person questions another person in precise terms, rather just posing a broad or vague challenge to the veracity of the other person’s views, it helps the team focus in on the real differences in viewpoints and explore those differences in a meaningful, productive way. Going back to the previous example, you might ask your colleague why he believes that tourism will decline. Is he referring to tourism for special events or for more routine amenities? What time of year might the decline occur? The goal is to understand the thinking behind a position so it can be tested. For instance, if it turns out your colleague believes the number of special events that attract tourists will decline, the team can take steps to investigate, like talking to the convention and visitors’ bureau to compare the upcoming year’s schedule with events held in prior years.
Define the way in which decisions will be made. The purpose of meetings is often to make decisions. Participants should therefore have a clear understanding of how decisions will be made. Consensus may be necessary at some meetings, and a majority at others. For some decisions, it can be useful to clarify which meeting participants have the ability to make the decisions. For example, in meetings involving the chief executive officer, his or her opinion will be given a stronger consideration. Not every meeting needs to adhere to the same rules, but in the case of disagreement, all participants should feel that issues were addressed fairly and decisions were made in a transparent way.

Create a space in which everyone can voice an opinion. The quality of information at a meeting will be better if all the attendees share their perspectives. This can be more easily said than done, however, as some participants may feel inhibited. The leader and facilitator can help by explicitly addressing the confidentiality of the views voiced at the meeting. For certain issues, creating a confidential space can offer additional assurance that it’s OK to speak openly. Another strategy the leader/facilitator can use is to ask the least senior participants in the meeting to give their views first, as these people might otherwise not feel comfortable speaking freely or at all if more senior staff set the tone on an agenda item by speaking first.

Finally, don’t expect everyone to be entirely comfortable with the idea of meeting guidelines right away. Being late to meetings, doing other work during a meeting, or any of the other bad meeting habits can become so ingrained that it is difficult for people to imagine giving them up. Once the guidelines are established, each meeting should have a positive effect on the next, until even the those colleagues who are habitually late or unprepared feel the pressure to join their colleagues in following the rules — which then inspires others to do the same.

ASSIGNMENTS

A good meeting ends with all participants on the same page. To ensure that you end on time, be sure to build in wrap-up time into the agenda. At the end of the meeting, summarize the decisions that were made and review the action items. Make sure assignments are clear.

Assignments often go to just a few members of the group. The facilitator should recognize this tendency and encourage all members of the group to volunteer for tasks, where practical. (In some cases, only certain people will be qualified for specific tasks.) For example, in Madison, team members often cited capacity concerns with their existing workload as their reason for not volunteering to complete team tasks. To overcome this challenge, the team set clear timelines and deliverables. This gave meeting participants a much better sense of what was expected and when, allowing them to better envision how the team’s work could fit in with their other
work commitments and making them more comfortable with volunteering to help with the team’s work outside of the meeting.

TWEAKING FUTURE MEETINGS

After your organization has revamped the way in which it conducts meetings, focus on continual improvement by taking stock of how different strategies are working in practice. One thing to watch for is making sure the right participants are at the table. You might need to take steps to optimize participation, such as inviting some new people, or you might also need to give other, less critical participants the ability to opt out, or at least attend only the portion of the meeting that is most relevant to them.

Next, consider how the format can be adjusted to get the most from and for meeting participants. Don’t expect perfect results the first time out. Establishing a new standard for the meeting structure, especially if your organization hasn’t really had any discernable meeting structure, is a big shift that might require a period of adjustment. For example, the City of San Mateo revised its finance department’s division head meeting. Despite some rough patches in the meeting, it was a positive experience. Much of the difficulty associated with the first meeting was attributed to team members adjusting to their roles. The meeting was more focused and the participants were more engaged than before. Decisions that were made were well documented, as were assignments that came out of the meeting. Despite these initial challenges, the total time for the meeting was reduced by 20 percent, from 90 minutes to about 70 minutes. Much of the efficiency was attributable to an agenda with explicit time allocations for each topic and the work of the leader and facilitator to keep things on track and moving. Eventually, it is expected that this standing meeting will be reduced to 60 minutes.

Participants appreciated the structure provided by the format and felt that the approach was ultimately more efficient. The increased focus was evident even at the first meeting. Some participants observed that a pre-meeting to clearly explain the roles, review the new agenda format, and establish ground rules would have been helpful, however. The city also found that more planning time would have paid dividends.

CONCLUSIONS

We spend a lot of time in meetings making important decisions. Why not take steps to make this time more productive and engaging for all participants? When meetings are structured optimally, the quality of the decisions we make will be better and employees will feel more satisfied.

Notes

1. A number of surveys show that managers and employees believe that a significant amount of time spent in meetings is wasted. For a summary of some of the relevant surveys, see: Ray Williams. “Why Meetings Kill Productivity,” Psychology Today, April 15, 2012. The New York Times article cited below also includes some of these statistics.


3. Part of the research for this article is based on Wiser: Getting Beyond Groupthink to Make Groups Smarter, by Cass R. Sunstein and Reid Hastie (Harvard Business Review Press, 2014). The authors cite ample scientific evidence that conventional group decision-making practices result in sub-optimal decisions.


5. Chip Heath and Dan Heath, Switch: How to Change Things When Change is Hard (Crown Publishing, 2010). The authors show research that indicating that peer pressure is an effective way to help create organizational change.

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