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**DEVELOPING PEOPLE AND ORGANIZATIONS**

# A Simple and Practical Format for Effective Workplace Meetings

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## INTRODUCTION

This document highlights the simple structure and task-related issues relevant to planned meetings in the workplace. The principles apply to individual and group meetings. They are based upon my experience of chairing and participating in over 10,000 meetings and by research-informed evidence. A good meeting can turn things in a positive or even inspirational direction. A poor meeting can cement a sense of demoralization. A key thing I have learnt is that what leads to a positive or negative meeting, is not just the ability of the individuals in it, but the clarity of the meeting process and the system it sits within. Talking about one aspect of a meeting, punctuality, Marquet (2012, p.29) says that,

> …little things like lack of punctuality are indicative of much, much bigger problems.

What happens in a meeting can be a symptom or reflection of organization culture. It can also influence and change the culture. Improve the function of a meeting and it will probably improve function outside of it. Meetings are an opportunity to observe and model many aspects of culture, such as,

- Values
- Leadership
- Collaboration
- Task clarity
- Discipline
- Boundary management
- Ownership
- Accountability
- Decision-making
- Inclusiveness
- The nature of authority

## ORGANIZATION AND MEETING DYNAMICS

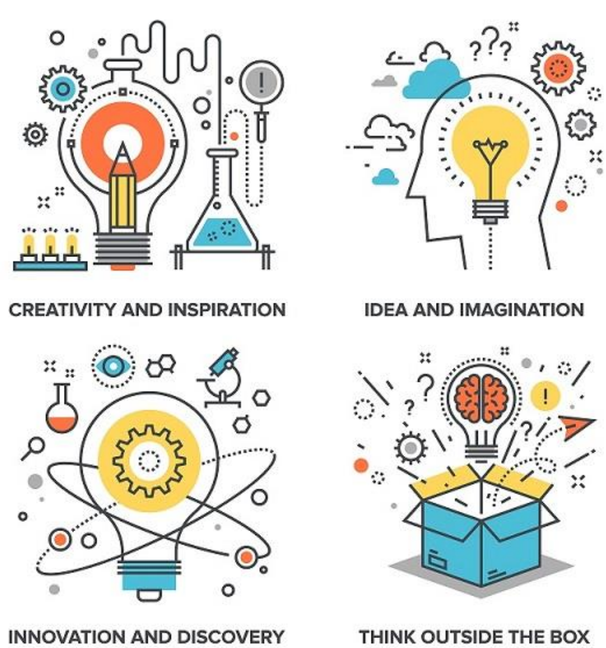
Whether a meeting is a product of the culture or influences it – paying attention to it provides a great opportunity. The opportunity is to provide a high standard that will strengthen the organizational culture. And what takes place in the meeting can also provide insight to the bigger problems that Marquet refers to. In his case, he was referring to the leadership of a nuclear submarine. Where inadequacies in culture and leadership can have life and death consequences. While the consequence may not be so severe in most organizations, they are serious in all measures of well-being, from financial to physical and mental health.

It could be argued that what happens in a regular meeting within an organization is the most obvious reflection of its culture and the best way to influence it. Therefore, the dynamics of a meeting can provide valuable insights into the prevailing issues of the organization. There are many factors other than the format of a meeting that will contribute to a productive meeting. For instance, the skills of the people involved. However, a good format certainly helps and a poor one will not. A lack of clarity in different aspects of the process may lead to a counterproductive meeting. An appropriate format can help contain potentially difficult meetings. It may enable challenging issues to be worked on productively and reduce the likelihood of conflict. It also provides a model of working together that will have many benefits outside of the meeting. It is an opportunity to provide a model of how,

- meetings and relationships are managed
- authority is exercised
- core values are held and reflected in the work
- communication is facilitated
- differences can be helpful
- decisions are made
- people are included
- contributions are valued
- understanding can be achieved
- anxieties and uncertainty are contained

Many more points could be added. In some ways, a meeting is a microcosm of the organization. The purpose of all planned meetings is to achieve desired objectives. And this is most likely to happen when people collaborate creatively together. Creative collaboration can be thought of as a kind of playful interaction. Friedman (1999, p.64) states,

> Broadening the perspective, the relationship between anxiety and seriousness is so predictable that the absence of playfulness in any institution is almost always a clue to the degree of its emotional regression.




Collaboration, creativity, and play are facilitated by a safe environment, where mutual trust and confidence develop. This, in turn, requires structure, predictability, and clarity. These conditions promote curiosity, which is the essence of play and exploration, the qualities that underpin discovery and achievement. This is true whether we are talking about the discoveries of an infant who explores from the safety of a mother's secure base or those of the great explorers in 'the age of discovery'. Clifford-Poston (2001, p.89) when talking about what a child needs to learn, simply says,

> A secure base from which to venture into the world and the permission to be curious.

The same can be said about the world of work and what happens in meetings. If a meeting is not a place for potential learning, where something new might emerge, information can just be sent by email, for example. To maximize the time and effort invested in a meeting process this article outlines the basic requirements.

**CLARITY OF PURPOSE – TASK DEFINITION**

If a meeting is going to take place everyone must know what the purpose and desired outcomes are. It sounds obvious but it is surprising how often the purpose of a meeting gets lost over time or was never clear, to begin with. This is understandable as a meeting may easily go-off task due to avoidance of difficulties and other reasons. A meeting may even become a refuge and escape from the work, rather than a place where difficult matters can be thought about. On the other hand, attendees may try to avoid a potentially difficult meeting.

Many organizations are prone to developing one new meeting after another but not giving up existing meetings. A new kind of meeting is sparked by a good idea, but the existing meetings which were also sparked by good ideas can be hard to let go of. So, a situation develops where people spend too much time in meetings and complain that they cannot get the real work done.

**Case Example**

One organization I was working in had this problem. People were increasingly complaining that they did not have enough time for their core tasks as too much was spent in meetings. After much discussion without much progress, it was taken to the monthly organizational consultancy. It was then agreed that all the chairs of the various meetings would review their meetings. They were to report back if the meeting was necessary to continue or not. If it were to continue, could the frequency be reduced? The chairs all reported back that their meetings should continue with the same regularity. When discussed at the next organization consultancy meeting, the consultant suggested that each chair go back to their meetings and come back with a clear definition of the meeting purpose. He suggested that any meeting that could not define its purpose in one or two clear sentences, should have a trial of stopping and see what happens. Following this, one meeting stopped and others became fortnightly rather than weekly. Once this happened there were no untoward consequences. Time was freed up and the pressure on the schedule reduced – much to the benefit of the organization's primary task.

As said, the purpose of any meeting should be defined in 1-2 clear sentences. The desired outcome(s) should be included in this definition. Periodically the meeting should review whether the purpose continues to be relevant. If not, either make the necessary adaptation or discontinue the meeting. Meetings should mainly be for discussing significant matters that need to be done in person. Also, as we have learnt many meetings can work well online - saving time and expense of travel.

**THE ROLE OF THE CHAIR**

This is vital to help ensure an effective planned meeting. The suitable chair for a meeting will usually be defined by the meeting's task. For example, in some meetings, a chair may be the line manager of the attendees. In others, it may be a peer or someone who does not work with the attendees directly. In some meetings, the chair is permanent, such as when it is a line manager. In others, the role may be time-limited, such as a Board meeting. In some cases, such as a peer-group meeting, it may revolve with each attendee taking a turn. Whatever the type of meeting, the chair always has a key role. Therefore, it is important to be clear about what it is. The following are appropriate responsibilities,

**1. Ensuring that the task of the meeting is clear, and all attendees know what it is.** This is can be discussed in the meeting, allowing questions for clarification. The task may seem clear, but people's interpretation of it may vary. The chair will need to be clear of his/her responsibilities and authority - related to the meeting itself and each attendee. An unclear definition of meeting task with unclear authority is a recipe for disaster. A central issue is the nature of decision-making authority. Some meetings have it and some do not. Those that do, need to understand the limits of their authority.

**2. Be clear about who is required to attend.** Usually, the expected attendance is clear. However, it is often not so clear what the expectations are about absences. It helps to have rules about absence or partial attendance. Requests for absence or partial attendance should be discussed with the chair in advance of the meeting. Sometimes the chair may have the authority to agree or not with the request. For instance, if the chair is also the line manager of attendees, he/she may decide whether to prioritize attendance at the meeting or missing the meeting to get on with other tasks. It is not helpful when people are absent without explanation or request in the meeting to leave early. As with most things anticipation and planning are always preferable. There are always exceptions where advance notice is not possible.

Another question that is important to clarify is whether someone else can represent an absent attendee at the meeting. For example, can a deputy manager attend on behalf of a manager? In some meetings, it may be helpful to have this option, while in others it may not be appropriate.

**3. Managing the time boundaries of the meeting.** How frequent is the meeting? What time does it start and finish? Sometimes these boundaries are established by organization policy and the chair's role is to manage those expectations. During the meeting, the chair may allocate someone the role of timekeeper. This person can remind attendees if the meeting is over-extending the agenda. It may be decided to allocate a certain time for each agenda item. Having someone in addition to the chair monitoring the time helps to keep the meeting on-task. Someone I worked with introduced this idea to me, and I was surprised by how much difference it made. Especially the reminder if an agenda item was going on and when we were close to the end of the meeting. The chair may decide to ask the meeting if they would rather continue one item and carry over others. There are many judgements to be made by the chair during a meeting.

**Punctuality**

Talking about why it is important to be on time, or even better a few minutes early, Duckworth (2016, p.267) says,

> It's about respect. It's about details. It's about excellence.

It needs to be clear what the expectation is if an attendee is late. In some cases, it may be appropriate to say that once the meeting time has started no-one will join the meeting. The reason could be that given the nature of the meeting, it would be unhelpful to disrupt once the discussion has started. Or it may be that occasional lateness has become a regular occurrence and the boundary needs tightening.

As the reliability of meetings is key to their success, avoid cancellations and time changes as far as possible. Regular unplanned changes undermine confidence, safety, and trust. If a cancellation or change needs to be made give attendees as much advance notice as possible.

**Case Example**
I had this experience, where lateness was a pattern especially for one or two individuals. About 15 minutes into one meeting, I saw a person who was late go-by outside. I paused the meeting and went outside to meet him who I was also the manager of. I said it would be unhelpful to join the meeting at this point and he could talk with me afterwards to discuss why he was late. The problem of lateness did not carry on after that. As said, it is the matter of a pattern that is the issue and not being excessive towards occasional lateness.

**4. Establishing the meeting ground rules.** For example, rules on confidentiality – what can be discussed in and out of the meeting? Ensuring that any rules of engagement are clear, such as being respectful. Qualities such as trust, fairness, openness, are especially helpful in creating a positive collaborative culture (Jaques and Clement, 1991, p.xv). They continue (p.73),

> It is our values that move us, bind us together, push us apart, and generally make the world go round.

A meeting should reflect the core values of the organization it is taking place in. It can be an ideal opportunity to model those values. Details such as whether mobile phones are switched off are important. In general, to enable the engagement of people in the meeting it is best to limit any distractions. Phones can be switched off and emergency contact with people in the meetings can be done through a nominated person outside of the meeting. It is helpful for everyone outside of the meeting who needs to know to understand this.

**Example**
This is an example of clarity that incorporates points on time boundaries and rules. It is a simple directive that a chair of a meeting put at the top of every meeting agenda,

**Meeting time:** 9.15-10.30 am
**Note:** All phones to be switched off. Respect start and finish times. Time will be allocated to agenda items. The meeting will finish at 10.30 even if the full agenda is not covered.

**5. Setting the agenda**. How this is done will depend on the type of meeting. Some meetings are business-like, and others are more exploratory. If there is no need for a formal agenda, as in some consultancy meetings, the task of the meeting should always be clear. Where there is a need for an agenda it is best to be completed and shared in advance. This helps attendees to prepare and not be taken by surprise in the meeting. However, there are occasions where something especially sensitive cannot be shared in advance. This should be an exception rather than the rule. A good method for establishing the agenda is for the chair to send one out and ask attendees to add suggestions to it. The chair will determine, which items and in what order the agenda is discussed. Prioritising is important and leaving off some items or carrying over is at the discretion of the chair. Some meetings will have standing items on every agenda.

**6. Minute-taking and actions**. Minutes are a requirement of most but not all meetings. As the chair needs to be paying attention to how the whole meeting is running it is unhelpful to also be the minute taker. This role can be taken in turns by the attendees or be someone whose role is specific to this. Usually, the most helpful minutes are those that show the agenda items discussed, any decisions made, actions to be taken, by whom and when. Where actions are agreed it is important to follow up. At the beginning of the next meeting, a quick update can be given on the progress of actions from the last meeting. This can be continued until the action is signed off as complete.

As minutes represent a summary of what was discussed rather than a verbatim record there needs to be a process for agreeing the minutes. A simple process is for the minute taker to first send the minutes to the chair. The chair can agree with the minutes or make corrections. The minutes can then be sent to all attendees for agreement and comment. Once approved by the chair the minutes are then a formal meeting record. It is important to be clear who the minutes are available to besides the attendees. Some minutes may be a confidential record and others may be shared.

**7**. **Preparation for the meeting.** The meeting room and how it is organized is an important part of an effective meeting. Some things that often indicate good preparation or lack of, include,

- A suitably sized room, enough chairs, etc. Being in a quiet enough space.
- The right kind of table. As well as size the question of round or rectangle table is worth considering. The positioning of people around a table can give a message about the meeting.
- Everything required in place, such as a projector, a large flipchart, etc.
- The room should be clean and well presented. It is worth checking the room a few minutes beforehand to make sure everything is in place.
- It is helpful to have a working clock in the room.
- Other items, such as tissues, water, cups, spare pens.
- Having a clear room booking system to prevent double booking and allocating suitable rooms for each meeting.
- Ensuring the right number of copies of any paperwork that is required for the meeting, agendas, etc.

These may seem obvious and simple, but I have seen many meetings delayed and distracted by not getting this right. As Marquet said, small issues not being managed well is often a sign of bigger issues in the organization. An essential part of preparation is that which all attendees do to be ready for the meeting with attention. The useful kind of attention includes being receptive to new ideas and possibilities. Any prior reading is done. Whenever possible any required reading should be sent out in advance, so people arrive as up to date as possible. The chair should role model a high quality of preparation. This also and most importantly means being mentally prepared. Giving a sense of having time and space for the meeting.

**8. Facilitating the discussion.** Perhaps the most skilled task of the chair is to facilitate a discussion that is inclusive and productive, within the time restraints of the meeting. There are many judgements to be made – when to allow silence for thinking, when to lead the discussion, when to prompt, when to cut short, when to extend, etc. This is a skilful task and one in which a chair will always be learning. One way of learning is to ask the meeting for feedback on how they have found the process.

**9. Presence.** The quality of presence provided the chair is central to everything discussed so far. The chair of a meeting is in a leadership role and Friedman (p.16) states that,

> What counts is the leader's presence and being, not technique and know-how.

The kind of presence that is helpful is one where the chair is self-differentiated, thoughtful, and calm. A self-differentiated person can be separate from others while remaining connected. From this position, the chair keeps the meeting's task in mind while exploring different possibilities. The effective chair will actively relate well to others while remaining calm and non-reactive. Friedman (p.14) argues,

> A well-differentiated leader is less likely to become lost in the anxious emotional process swirling about.

With this capacity, he/she can affect the whole system of relationships and reduce the level of anxiety in the organization network. All meetings take place in and influence a wider relationship system. Friedman (p.19) says that the leader's integrity promotes the integrity or prevents the "disintegration" of the system he or she is leading. This is true whether we are talking about the system of the organization or a meeting. Therefore, possibly the most important task for a chair is to work on the nature of his or her being and presence.

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**APPENDIX -** examples to illustrate a simple format for making the purpose and requirements of a meeting clear.

If you complete a format like this for your meetings, it will be a helpful way of reviewing the purpose of each meeting. It may also highlight improvements that need to be made.

**1 - Senior Management Meetings**
**Task:** To ensure the effective performance of the organization in line with its mission, values, and outcomes. The meetings will cover,

1) business planning and co-ordination
2) problem-solving development and training
3) review of KPI's – identification of successes and difficulties, agreeing on responsibilities for improvement.

**Chair/Manager:** Director

**Participants:** Director, Deputy Directors, Department Heads, others as needed. (A suitable representative for an absent participant can be nominated agreed with the Chair.)

**Frequency:** Weekly for 1-hour

**Administration (any required paperwork):** Agenda and KPI's distributed in advance. Minutes will include the record of attendance, decisions made, actions. Minutes will be distributed to attendees and filed.

**Relevant Policies, etc.:** Organization Governance Policy

**2 - Individual Supervision**
**Task:** To develop the supervisee's quality of work in line with the organization's mission, values, and outcomes.

**Manager:** Line Manager/Deputy Manager

**Participants:** Supervisor and Supervisee

**Frequency:** 1 hour every 2 weeks. When meeting every 2 weeks is not practically possible – a minimum of 2 hours within the month

**Administration (any required paperwork):** Supervision agreements and records, filing.

**Relevant Policies, etc.:** Supervision Agreement, Supervision Record, Supervision Policy, Performance Development Review