APPENDIX 1

Managing Meetings
A Toolkit

"A meeting is a gathering where people speak up, say nothing, and then all disagree."

—KAYSER, 1990

The work of teams largely proceeds through meetings. Whether they are regularly scheduled or called out of need, effective meeting management is a key to success. Furthermore, people spend a lot of time in meetings. Typical executives spend two-thirds of their time in scheduled meetings, and the amount of time managers spend in meetings increases with organizational level. Middle managers spend about 30 percent of their time in meetings; top management spends about 50 percent of their time in meetings. In addition to scheduled meetings, managers are involved in unscheduled and non-job-related meetings. In a study sponsored by the 3M Corporation, the number of meetings and conferences in industry nearly doubled during the previous decade and the cost of meetings nearly tripled. Most businesses spend 7 to 15 percent of their personnel budgets on meetings.

Perhaps meetings would not be a bad thing if they were economical and effective. Unfortunately, as much as 50 percent of meeting time is unproductive, and up to 25 percent of meeting time covers irrelevant issues. As one senior executive put it, "To waste your own time is unfortunate, but to waste the time of others is unforgivable." Companies are so overburdened with meetings that experts say it's a wonder any work gets done. Meetings also trigger stress. The 3M meeting network recently launched a World Wide Web site where workers describe their meeting horror stories. Not surprisingly, managers have resorted to using various tactics, which vary from the radical (removing all chairs to make people stand, locking the doors, requiring people to pay 25 cents before speaking, etc.) to the more tame (see the example in Exhibit A1–1).

EXHIBIT A1–1 Meeting Tactics

The Test and Metrology Services Department of the Collins Commercial Avionics Division of Rockwell International in Cedar Rapids, Iowa, operates as a self-directed team. The key to their effective meeting management is amazingly cheap: cards. The card system came about because even with an agenda, lengthy weekly meetings among its 20 members exceeded the allotted time. In the card system, two 8 x 10-inch cards are passed out to each member at the beginning of the meeting. Each side is color-coded and inscribed with words: red and green on one card; white and yellow on the other. When an issue is brought before the team, all members display the red "needs discussion" card. If someone wasn't there to talk about the issue, she shows a white "need to talk" card to the facilitator, who recognizes the cardholder. As the discussion progresses, team members change their cards to green "ready to vote" cards. The facilitator terminates the discussion only when no more red "needs discussion" cards are displayed. When voting, team members can agree (green card), be neutral (white card), support but not like it (yellow card), or disagree (red card). The team members can hold up a yellow ("to task team") card that indicates more information is required. Lab manager George Fluharty states that the card system has had a dramatic impact on reducing the length of meeting time and providing team members with a voice. Another advantage to the card system is that everyone votes; no issue is dropped until the facilitator views each member's card. The cards have gone a long way to reduce side discussions and disruptive noise during meetings. However, like any system, there are disadvantages to the card system: Team members may form opinions quickly and show their votes before discussion is completed; the system also lends itself to subtle, nonverbal communication, such as when a member lays her cards on the table to signal her opinion. To stop that from happening, team members suggested that cards remain in laps until action is requested and side discussions can be conducted only with cards.

SOURCE*:* Pettit, J. (1997, January). Team communication: It's in the cards. *Training and Development, 15*(1), 12–14.

THE 4P MEETING MANAGEMENT MODEL

The 4P model is a method for designing and implementing effective meetings.[1] It has four key steps (see Exhibit A1–2): (1) specify the purpose of the meeting, (2) invite the right people, (3) carefully plan the meeting content and format, and (4) effectively manage the meeting's process.

Skilled meeting managers do not just sit at the head of the table and call upon people to speak in a round-robin fashion. Nor do they run a "talk show" by simply airing ideas, conflicts, and concerns. Skilled meeting managers do not write down everything that is said; rather, they call out and punctuate key themes. Skilled meeting managers do not orally paraphrase members' ideas; rather, they record them visually. Skilled meeting managers do not try to induce dominant members to yield the floor by saying, "keep it short" or "we need to hear from everyone"; rather, they use brainwriting at select times. They do not organize the meeting by who is there; rather, by what is to be done (see Exhibit A1–3). Munter and Netzley provide a full checklist for the meeting organizer and organize discussions around five key planning questions:[2]

1. Why meet? (Define your purpose and choose your channel)
2. Who to include? (Select and analyze the participants)

[1]Whetton, D. A., & Cameron, K. S. (1991). *Developing management skills* (2nd ed.). New York: HarperCollins.
[2]Munter, M., & Netzley, M. (2002). *Guide to meetings.* Upper Saddle River, NJ: Prentice Hall.

EXHIBIT A1–2 4P Meeting Management Model

Key Skills	Questions to Ask
Purpose	
• A complex problem needs to be resolved using the expertise of several people. • Team members' commitment to a decision or to each other needs to be enhanced. • Information needs to be shared simultaneously among several key people.	• What is the purpose of the meeting? • Is the purpose clear to participants? • Is a meeting the most appropriate means of accomplishing the goal? • Are key people available to attend the meeting? • Is the cost of the meeting in proportion to what will be accomplished?
Participants	
• The size of the team should be compatible with the task. • A balance between people with strong task orientations and those with strong interpersonal skills is desirable.	• Is the size of the meeting appropriate given the problem of coordination costs? • What diversity of skills and backgrounds is important to have in the meeting?
Plan	
• Provide for adequate physical space, etc. • Establish priorities by sequencing agenda items and allotting time limits to each item. • Prepare and distribute the agenda before or at the beginning of the meeting. • Organize the agenda by content, not by who is there. Use a three-step approach: announcements, decisions, discussion. • Think about your visual aids: Visual aids are 43 percent more persuasive than no visuals. • Choose the most appropriate decision-making structure (e.g., brainstorming, normal group technique).	• Has an agenda been created? • Has the agenda for the meeting been distributed to members prior to the meeting? • Have members been forewarned if they will be asked to report? • Has the physical arrangement been considered (e.g., whiteboards, overheads, flipcharts)? • Has key information been put into proper information displays? • Has a note taker been assigned?
Process	
• At the beginning, restate the overall purpose of the meeting and review the agenda and time constraints. • Make note of the ground rules, such as how decisions will be made (e.g., raised hands, secret ballot). • Use techniques to ensure equal participation from members. • Conclude the meeting by summarizing key decisions, reviewing assignments, and determining objectives for the next meeting.	• If this is the first meeting of a team, has an icebreaker been included? • Does the icebreaker get people involved in a behavioral or emotional way (at a minimum, a handshake or high-five)? • Have the ground rules been determined and shared with members in advance of the meeting?

SOURCES: Adapted from Whetton, D. A., & Cameron, K. S. (1991). *Developing management skills* (2nd ed.). New York: HarperCollins; Armour, S. (1997, December 8). Business' black hole. *USA Today,* p. 1A; Tropman, J. E. (2003). *Making meetings work: Achieving high quality group decisions* (2nd ed.). Thousand Oaks, CA: Sage.

EXHIBIT A1–3 Announcements, Decisions, and Discussion

Most meetings are organized on the basis of who is there. Reports flow out person by person, department by department, often beginning with the most prestigious person and proceeding down. However, this type of round-robin format is inefficient. It is better to organize meetings by the content. Announcements should come first, then decisions, and finally discussion time, in that order.

SOURCE: Tropman, J. E. (2003). *Making meetings work: Achieving high quality group decisions* (2nd ed.). Thousand Oaks, CA: Sage.

3. What to discuss? (Orchestrate roles and set the agenda)
4. How to record ideas? (Plan for graphic facilitation)
5. Where to meet? (Plan for technology and logistics)

Munter and Netzley argue that recording the comments in the meeting is a critical aspect of successful meeting management and present a variety of different ways to organize information on flip charts, and so on.

DEALING WITH PROBLEM PEOPLE IN MEETINGS

There is no surefire way to deal with "problem people." As a general principle, having structure helps. It can also be helpful to give group members a list of desirable and undesirable role descriptions prior to the meeting. Exhibit A1–4 is a list of typical group members. Although stated in jest, each description has a ring of truth to it.

EXHIBIT A1–4 Typical Group Members

Thelma Talk-a-Lot	("I just have to say this")
Sam Stall	("Let's not rush into this")
Don Domineering	(talks 75 percent of the time about his own ideas)
Nick Negative	(explains that someone has to be the devil's advocate)
Ted Theorizer	("It's really complex")
Nancy Nuts-'n'-Bolts	(always comes up with an impossible example to deal with)
Jim Just-a-Little-Bit-More-Information-on-This-Topic-Please	("I don't feel we should decide until we know more")
Herman Hypochondriacal	(is convinced that any path makes vulnerabilities increase)
Yolanda You're-Not-Going-to-Believe-What-Happened-to-Me	(uses immediate, personal events rather than overarching views to analyze problems)

SOURCE: Tropman, J. E. (2003). *Making meetings work: Achieving high quality group decisions* (2nd ed.). Thousand Oaks, CA: Sage.

ADVICE FOR MEETING ATTENDEES

The burden of effective meeting management does not rest solely on the shoulders of the leader. Group members need to engage in the following proactive strategies:[3]

- ***Determine whether you need to attend the meeting.*** Don't attend merely because you have been invited. If you have doubts about whether the meeting's agenda applies to you, discuss with the leader why he or she feels your presence is important.
- ***Prepare.*** Acquaint yourself with the agenda, and prepare any reports or information that will facilitate others' understanding of the issues. Come prepared with questions that will help you understand the issues.
- ***Be on time.*** Stragglers not only waste the time of other participants by delaying the meeting or by requiring summaries of what has happened, but they also hinder effective team building and hurt morale.
- ***Ask for clarification on points that are unclear or ambiguous.*** Most of the time, you will find that others in the room have the same question but are too timid to speak out.
- ***When giving information, be precise and to the point.*** Don't bore everyone with anecdotes and details that add little to your point.
- ***Listen.*** Keep eye contact with whoever is speaking and try to ascertain the underlying ideas behind the comments. Be sensitive to the effect of your nonverbal behavior on speakers, such as slouching, doodling, or reading.
- ***Be supportive of other group members.*** Acknowledge and build on the comments of others (e.g., "As Jane was saying . . .").
- ***Ensure equitable participation.*** Take the lead in involving others so that everyone's talents are used. This is especially important if you know that some participants' points of view are not being included in the discussion. This can be accomplished by encouraging those who rarely participate (e.g., "Jim, your unit worked on something like this last year. What was your experience like?").
- ***Make disagreements principle-based.*** If it is necessary to disagree with, or challenge, the comments of others, follow the guidelines for collaborative conflict management (e.g., base your comments on commonly held principles or values; for example: "That's an interesting idea, Bill, but how does it square with the president's emphasis on cost-cutting?").
- ***Act and react in a way that will enhance the group performance.*** In other words, leave your personal agendas at the door and work toward the goals of the group.

COMMON MEETING DISEASES AND FALLACIES

It is almost impossible to predict where most meetings will go awry. The following is a description of the most common meeting diseases and some ideas on how to combat them.

[3]See note 1.

The Overcommitment Phenomenon

Symptoms: Many people agree to perform tasks and accomplish goals that they cannot possibly do in the time allowed. In some cases, this problem is attributable to the pressures placed on managers to accomplish goals and say "yes." However, in many more instances, the overcommitment problem stems from a fundamental inability to estimate how long it will take to accomplish a task. In addition, people tend to make commitments in advance because their confidence in their ability to finish is higher when they are further away from the task.[4] Most people make subjective mental estimates of how long it will take to accomplish a task, such as writing a report, collecting information, or interviewing a recruit, by imagining the scenario and then estimating a time line based upon the running of the scenario. However, individuals' mental simulations fail to take into account the process losses that will inevitably thwart their efforts. For example, when they expect to spend two weeks writing a report, they fail to anticipate that their printer will break down and that they will have to spend a day offsite. Consequently, most managers are consistently behind schedule.

In many cases, managers and executives are asked to commit themselves to perform tasks and events at some time in the distant future. For example, a team leader might be asked to enroll in a three-day course next year, travel abroad to interview other team members, or attend a conference. Many people agree to these future invitations, but when the time approaches, regret that they have to do what they promised.[5] People fail to adequately weigh the importance of their future opportunities and time constraints, so they commit to things in the future that they would most likely decline to do in the present.

Treatment: The easiest way to deal with the overcommitment problem is to simply double (or triple) the amount of time projected to accomplish a task. For example, publishers typically add six months to an author's projected completion time for a manuscript. Another way of combating the bias is to break the task down into its different elements and then estimate the time necessary to complete each part—people are more accurate at estimating the time necessary to accomplish smaller tasks. When someone asks you to do something, such as write a report, travel, or make a presentation, imagine that you are being asked to do this the next week, or even the next day. If you are disinclined, it may not be a good idea to take it on.

Calls for More Information

Symptoms: Often, teams are uncomfortable making decisions. This is particularly true when the decision matter is complex and value laden. Under such conditions, teams will do nearly anything to avoid making decisions. The manager faces an avoidance-avoidance conflict: Making a decision is difficult, but not making a decision makes one appear indecisive. Managers often respond to this avoidance-avoidance conflict by requesting more information. In theory, the amount of information relevant to any decision situation is boundless; however, at some point, decisions must be made. One way of avoiding decision making, but not appearing to be indecisive, is to request

[4]Gilovich, T., Kerr, M., & Medvec, V. H. (1993). The effect of temporal perspective on subjective confidence. *Journal of Personality and Social Psychology, 64*(4), 552–560.
[5]Loewenstein, J., & Prelic, D. (1991). Negative time preference. *AEA Papers and Proceedings, 81*(2), 347–352.

additional information. This makes people feel as though they are making progress, but actually, the additional information may not be diagnostic or useful. It is merely gathered so that the team members can better cognitively justify their decision. Decision avoidance is a particular concern when teams make negative decisions, such as downsizing.

Consider, for example, the following scenario:

> A businessman contemplates buying a certain piece of property. He considers the outcome of the next presidential election relevant to the attractiveness of the purchase. So, to clarify the matter for himself, he asks whether he would buy if he knew that the Republican candidate were going to win, and decides that he would do so. Similarly, he considers whether he would buy if he knew that the Democratic candidate were going to win, and again, finds that he would do so. Seeing that he would buy in either event, he decides that he should buy, even though he does not know which event occurs.[6]

The preceding rationale is known as the **sure-thing principle.** It would seem irrational, or somewhat silly, if the businessperson in this case were to delay purchase until after the election or to pay money to find out the election results ahead of time. Yet in organizations, decision makers often pursue noninstrumental information—information that appears relevant, but if available, would have no impact on choice. The problem does not end there. Once they pursue such information, people then use it to make their decision. Consequently, the pursuit of information that would have had no impact on choice leads people to make choices they otherwise would not have made.[7]

Treatment: The decision trap of calling for more information can best be dealt with by keeping a clear log that details the history of the decision. For example, a team member might say something like, "You know, this issue was first brought up two years ago, and it was agreed that a competitive analysis was necessary. This competitive analysis was performed and I brought you the results the following spring. Then, it was suggested that a task force be formed. We did this and came to some conclusions in a report circulated last fall. We agreed at that time that we would make a decision at this meeting. I realize that more information is always better, but I am beginning to wonder whether the costs of continuing to search for information are a way of avoiding a decision." This strategy is especially important in teams where membership changes (and, hence, organizational memory is lost) and in teams that must make tough decisions (e.g., employment terminations).

Failed Memory and Reinventing the Wheel

Symptoms: Many teams face decisions that they make on a repeated basis. For example, merit review decisions, hiring decisions, admission decisions, funding decisions, and so on are all decisions that must be made repeatedly. However, teams often exhibit a

[6]Savage, L. J. (1954). *The foundations of statistics.* New York: John Wiley & Sons.

[7]Bastardi, A., & Shafir, E. (1998). On the pursuit and misuse of useless information. *Journal of Personality and Social Psychology, 75*(1), 19–32.

memory loss of sorts, in terms of how they made previous decisions. As a result, they spend precious time arguing with one another as to how they made the decision in the past, and memories prove to be fallible. The failed memory problem is most likely to afflict teams that have not created a sufficient organizational memory. The failed memory problem also haunts teams that experience turnover. Under these situations, team members who take notes, or have some kind of record, have an enormous advantage.

Treatment: The key here is to make the process explicit and then to have it recorded in some fashion so that it can be later retrieved. The problem is that most people trust their memories at the time they are discussing the issue or making the decision; consequently, they don't bother to write down what they believe will be burned into their memory.