

Less pain; more gain: How To Make Your Meetings More Productive

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Some thoughts about meetings...

Just like your time and talent, 25 to 50 percent or more of your managers' time and talent is also tied-up in meetings. And you know each meeting is with two, three, five or more other people. Do you ever wonder what return you get from that investment? Seldom acknowledged, never measured, but no secret, meetings seldom produce their desired outcome. "*Heads would roll*" if any other business process had the level of failure or variation in output that meetings have. Nonetheless, the meeting is the primary mechanism for a manager to execute his or her duty.

The social and the financial costs to the organization of meetings failing to achieve their goals are quite substantial, so it is worth trying to make this business process more productive.

This white paper reviews three classes of meetings and discusses the framework each needs for success. This analysis should help members of the executive team make meetings in your organization more productive. As well, the paper introduces a new tool that can help you improve the productivity of any meeting.

Types of Meetings

The first step in making each meeting more productive is to recognize what type of meeting you are holding and to use the appropriate structure for the topic, issues and outcome that will be on the table.

Each type has its own unique requirements for success. And each has its own unique set of cost consequences.

Briefly the three types of meetings are—

1. For the Record
 2. For Conformance
 3. For Mutual Gain
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For the Record is a type of meeting dealing with the myriad of compliance issues required by regulatory authorities such as investors, boards, as well as governments and their agencies.



“For the Record”

For Conformance is a type of meeting dealing with daily supervisory or management issues to maintain alignment with corporate or departmental rules, policy, vision, goals and operating procedures.



“For Conformance”

For Mutual Gain is a type of meeting dealing with inter-departmental or inter-company issues. These meetings will be with the organization’s suppliers and customers or with the internal clients of departments such as users of the Information Services Department. This class of meeting is *critical* to the overall performance of the organization. For most organizations this type of meeting will be held most frequently.



“For Mutual Gain”

The table below summarizes some of the characteristics of these types of meetings. You can find a more detailed version of this table in the Appendix.

The Characteristics of Each Type of Meeting			
Type	For the Record	For Conformance	For Mutual Gain
Format	Chaired	Manager Led	Facilitated
Style	Top Down	Top Down	Peer-to-Peer
Goal	Compliance Policy, Survival	Conformation Vision/Goals/Procedures	Build Relationships Collaboration
Decision Process	By Majority Vote	By the Manager	By Consensus
Examples	Board Meeting Election of Officers Annual Meeting Audit Committee	Safety Meetings/WHMIS Budget Meetings Scheduling, Goal Setting Performance Reviews Status Update Meetings	Interdepartmental Needs Analysis Quality Improvement Project Meetings

Frameworks for Meetings

What holds meetings together? What’s the glue? Two of the meeting types share the same glue, while the third is held together by unique glue.

The “*For the Record*” type uses a framework (template and rules) called an Agenda and Robert’s Rules of Order, either formally or informally, along with about 200 years of history embedded in our culture of parliamentary procedure. The meetings are chaired. And within the Rules, the chair can do just about anything he or she wants. The glue for this type of meeting is **power**, the power of the law.

The “*For Conformance*” type has no traditional framework (template and rules) to follow. Nor do managers leading these meetings **have to have** a framework, nor do they think they need a framework. Managers pay their staff to attend their meetings. So they can do whatever they want. The manager has **power**. That’s the glue.

The “*For Mutual Gain*” type is particularly interesting. There has been no traditional framework (template and rules) for this type of meeting. These meetings are held with people outside your or your manager’s sphere of influence. Neither party has **any** explicit **power**. These meetings need a framework to be effective, but there has been no explicit framework available. To get buy-in participants use an ad-hoc collection of sales techniques, personal charisma or negotiation strategies. Generally these are inappropriate for the job. The glue for this type of meeting is **mutual gain**.

The *For Mutual Gain* meetings are potentially the toughest meetings to hold and yet the most important because the outcomes of mutual-gain meetings affect the overall financial performance of the enterprise.

We’ll take a deeper look at mutual gain meetings.

For Mutual Gain Meetings

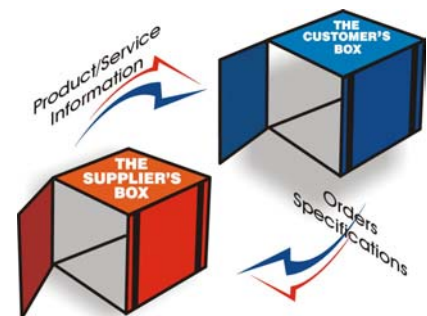
Mutual gain meetings are those meetings held with people outside your sphere of influence— out-of-your-box. The goal is to collaborate and build relationships. These are meetings along the external and internal supply or value chain.

Every type of meeting is mission-critical for the individual leading the meeting, but mutual gain meetings are mission-critical for the organization as a whole. The outcomes from these meetings have a broad affect on financial performance.

The end result of a mutual-gain meeting is a deeper understanding of the work activities of the other party in a transaction. The more you understand how they accomplish what they do and the more they understand about what you do, and about the product or service you provide, the more likely you will be able to help one another.

Here are some examples of mutual gain meetings:

Consulting and Consultative Sales – where you require information from your customer in order to provide a product or service that truly meets their needs.



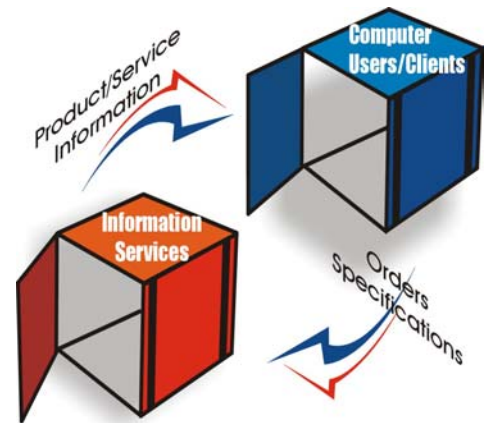
Meetings with individuals outside the organization are mutual gain meetings.

Project meetings – where creative thinking and collaboration is required from all project team members in order to effectively complete the project on time and on budget.

Team meetings – where creative thinking and collaboration is required from all team members in order to improve the business.

Information Services – where you require information from your end users in order to provide the product or service that will save your users the most time and money.

Mutual gain meetings are about making the other partner in a transaction more successful.



Meetings among peers or groups within the organization but who are internal suppliers of products or services are mutual-gain meetings.

The Cost of Meetings

There may be too many meetings but certainly too few successful meetings. Given that the primary role of a manager is to bring about change—to improve productivity and reduce operating costs—the meeting is a core business process of managers.

Managers and executives spend 25 to 50 percent or more of their time in meetings. Often these meetings involve several other people. If the desired outcome of the meeting misses its mark, as it often does, the cost of the lost opportunity can add up to as much as \$100 per hour per attendee.

Meetings affect the social fabric of the organization as well as its financial performance. Jim Collins writes in his book, “*Good to Great*”, about how great organizations share the characteristic of having meetings that create “intense dialogue” to shape their culture; to create a better workplace. Anyone who has attempted a business process re-engineering project knows just how dependant culture change is on meetings.

Many meetings are of critical importance and all meetings are expensive. However, the benefits of a successful meeting can be substantial so focus on improving the productivity of meetings, not reducing the number of meetings. The way to do this is to use an appropriate framework for each meeting topic.

The Game Changer

Looking from the perspective of who leads meetings, every meeting, for the individual who leads it, is filled with stress and time management issues. There is the potential embarrassment and fear of failure, the potential of disappointment or losing face. Meetings are a high-risk environment for many managers. The leader of the meeting must get a specific outcome. At every meeting, the leader of the meeting feels their job or professional reputation is on the line. Meetings reflect an individual’s leadership abilities. Meetings are

career makers or career breakers. That's stress! So for the individual leader of a meeting, every meeting is mission-critical.

However, from the perspective of the organization, mutual gain meetings are mission critical because the outcomes from mutual gain meetings affect the fundamental cost structures of an organization. Therefore, a framework for mission critical meetings can be a game changer for organizations.

Such a framework is shown in the photo on the right and briefly described in the caption. More details can be found in the appendix of this white paper on the framework we call a Discussion Document™ (fondly referred to by users as simply a "DD"). This framework was originally designed for mutual gain meetings, but is a valuable tool for any type of meeting. We describe here the contribution this framework makes to mutual gain meeting and follow with comments on its use to improve productivity in *For the Record* and *For Conformance* meetings.

A mutual gain meeting requires a special kind of framework because participants are operating outside their sphere of influence.

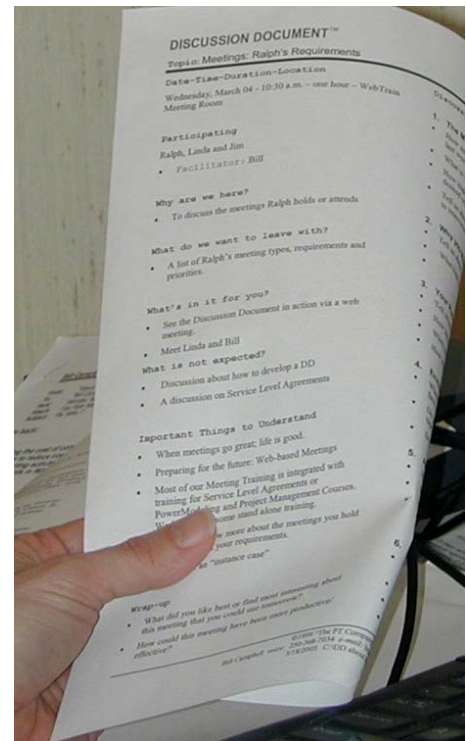
So what kind of framework will provide the needed glue? Clearly, the framework must help establish cooperation and trust. It must instill and support a collaborative environment. Power, which works so well in *For the Record* or *For Conformance* meetings, won't work for mutual gain meetings. Communication breaks down under the power frameworks. But a collaborative environment can be achieved using a Discussion Document™.

Improving the Productivity of Meetings

Users of the Discussion Document™ report productivity improvements of 50 percent or more. What used to take two or more hours is now accomplished in an hour to an hour and a half. In the following section we discuss some basic ideas about how to improving meetings so they better meet their goals.

Improving Mega Meetings

Mega Meetings are one, two or three day events. They often involve a dozen or more managers. The amount of material to be covered and the time required to cover it can be daunting, for both the leader of the event and the participants.



The Discussion Document™ provides an explicit framework (Template and Rules) for meetings.

It is a tool to ensure your meeting will produce its desired outcome and finish on-time. Less stress, fewer time-management issues. More joy for you; a breath-of-fresh air for attendees.

The mission of a meeting: **get the outcome you desire**. A simple tool, the Discussion Document™, will help you achieve this mission-critical objective. The Discussion Document™, provides a framework—a support structure—for your meetings.

The Discussion Document™ uses a one-page, two column format. The left column frames the structure of the meeting, while the right column frames the discussion.

It's cool; you get your whole meeting mapped out on one-page. It's professional, you prove to attendees you value their time and participation.

These meetings offer an easy target for improvement and the solution is quite simple. Break them up into a number of smaller meetings and choose the appropriate framework for each topic or issue that will be on the table. A meeting of eight hours duration is split up into four to six separate sub-meetings. Use a separate Discussion Document™ for each sub-meeting.

As the mega-meeting event proceeds, a goal is achieved after each sub-meeting, participants feel that milestones are being reached, tangible outcomes are being accomplished and the larger whole of the event isn't as daunting.

Improving *For the Record* meetings

Once you recognize the type of meeting you will lead and apply the appropriate framework you are on the road to success.

For example: you will often find groups, say an Equestrian Society incorporated under the Societies Act, appropriately beginning a *For the Record* meeting, i.e. covering the *business* of the Society. When done the official business of the Society—the previous minutes read, unfinished business dealt with and who will be the new Officers for the coming year President, Vice President, Secretary—moves on to discuss the business of planning the annual riding competition or fund raising dance and does so without changing the format of the meeting. Businesses, non-profit organizations and other clubs do this all the time. The design plan for the riding competition or fund raiser suffers. The appropriate format for planning these events is as a mutual gain meeting. Switch from a chair to a facilitator; from an agenda to a Discussion Document™.

Improving *For Conformance* Meetings

The situation is similar with *For Conformance* meetings, the mixing of topics and issues without changing the format of the meeting. A meeting with staff may start off with a set of topics that require a top-down “control” approach. Safety issues, ethical issues, performance issues come to mind. However, if the manager has topics that require dialogue and cooperation such as improving a particular business process or a topic about a project then a different format is in order.

You don't need a DD to fire someone. But you do need a DD if you want cooperation, consensus or if you are trying to create a self-directed environment.

About the worst thing a manager can do is start a meeting off with a request, “*I want your input*” when in fact the outcome has already been determined. The appropriate starting point would be, “*Here is where we are going. I would like your feedback.*”

The Discussion Document™

This section of the white paper briefly presents the highlights of a Discussion Document™.

DISCUSSION DOCUMENT™

Topic: Meetings: Ralph's Requirements

Date-Time-Duration-Location

Wednesday, March 04 - 10:30 a.m. - one hour - [WebTrain Meeting Room](#)

Participating

Ralph, Linda, France and Jim

- Facilitator: Bill

Why are we here?

- To discuss the meetings Ralph holds or attends

What do we want to leave with?

- A list of Ralph's meeting types, requirements and priorities.

What's in it for you?

- See the Discussion Document in action via a web meeting.
- Meet Linda and Bill

What is not expected?

- Discussion about how to develop a DD
- A discussion on Service Level Agreements

Important Things to Understand

- When meetings go great; life is good.
- Preparing for the future: Web-based Meetings
- Most of our Meeting Training is integrated with training for Service Level Agreements or PowerModeling and Project Management Courses. We have done some stand alone training.
- We need to know more about the meetings you hold so we can meet your requirements.
- The idea of an "instance case"

Wrap-up

- What did you like best or find most interesting about this meeting that you could use tomorrow?
- How could this meeting have been more productive/effective?

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C: [redacted]

A Discussion Document™ is one page. Just one. The advantages of the one-page format are—

- It is clear and concise
- All participants know what's going on
- Attendees see the whole meeting at a glance

The benefit of this is that there is greater participation during your meeting because there is no hidden agenda.

A Discussion Document™ has a two-column format. Why?

- The first column sets the meeting framework
- The second column sets the meeting content
- It's easy to follow.

It contains a single, concrete purpose of your meeting. The advantage of a single, concrete purpose is clarity and focus for your meeting. This results in a more productive meeting.

The DD contains a single, concrete meeting goal. This enables all attendees to be clear about what they are working towards during your meeting. Also, with a single, concrete goal you will be able to measure the success of your meeting, i.e., did you achieve the goal?

The DD identifies what will not be talked about. This allows you to constrain the meeting's discussion and provides clarity to the attendees. Your meeting will stay on

track and end on time.

The DD provides context for your meeting. It provides background information and expected activities that will happen after the meeting. It provides specific information each attendee will require in order to participate in the meeting. Doing so will ensure that all meeting attendees are “on the same page” and are better able to participate in the discussion.

The meeting content is divided into categories of discussion points. This allows you to break any large, overwhelming topic into smaller, more manageable “chunks”. This also makes it easier for the attendees to manage a large topic and therefore enter into the dialogue.

The meeting content is guided by 20 open-ended questions. Questions generate dialogue, discussion and debate. The answers to open-ended questions cover over a million variables. Questions result in collaboration by the meetings attendees and generate the best decision through the best of everyone’s thinking.

The DD has a “Wrap-Up” section that allows everyone to give feedback on the dynamics of the meeting. This gives you feedback on the success of your meeting and gives you information to work with to improve the next meeting. It also provides closure for the attendees.

A Discussion Document™ becomes the written plan for a meeting. A written plan has many advantages:

- You, as the facilitator, are freed up to think on your feet during the meeting
- You can collaborate with others to review and edit the plan
- Items and issues to be covered in the meeting are not forgotten
- Attendees know within 30 seconds everything that will be discussed
- Shows respect for the attendees
- Earns the respect of attendees

Discussion Points

1. The Meetings

- How many meetings to you lead each day? How about last week? Next week?
- What is the most frequent type of meeting?
- How important is discussion and dialog to getting the desired outcome from your meetings?
- Tell us about performance review meetings, meetings to interview new hires and cold calls?

2. Why you Meet

- Tell us about why you hold meetings.
- What kind of things are you trying to achieve?
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3. Your Plan for a Meeting

- Tell us how you plan for a meeting.
- How long does it take to plan?
- When and where have you used an agenda?
- How about e-mail to outline topics?

4. Environment and Tools

- Where do meetings take place? Your office, face-to-face; telephone?
- Do you use a white board? Do you use a computer, tape recorder or digital camera to record notes?
- Do you use PowerPoint or a PowerPoint Projector?

5. Attendees

- How many people attend?
- Who do you meet with?
- What skills do you bring to the table? What skills are necessary? What skill have you seen used that you wish you had?

6. Meeting Outcomes

- How many met your expectations? How do you know?
- What things go right?
- What things go wrong?
- Tell us about meetings you attend rather than lead? What went well? What didn't go well?

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about the meeting

A written plan offers the following benefits—

- You are better able to maintain control of the meeting
- Stress on you, as the facilitator, is reduced
- Time is better managed
- Early buy-in from attendees is achieved
- Stress on the attendees is reduced
- Attendees are willing to participate in your next meetings
- The plan for the next meeting can be improved
- You get the outcome you set out to get.

Change Management

Executives who desire to improve the way meetings are run in their organization by implementing a “corporate standard” policy will find that, like all change, it is easier said than done.

It is difficult, even with training and incentives to prevent people from returning to their old ways of doing things. It is simply difficult for individuals to move out of their comfort zone. Old habits are hard to break. Barriers are needed to prevent individuals from returning to their old ways.

The solution proposed in this white paper requires the adoption of a formal, (maybe even rigid structure) to a business process. The formality and rigidity called for is common among most other business processes, for example processing a purchase request or booking a patient into acute care. Getting managers to adopt a new process will not be easy.

The best approach/barrier we have seen is where a department head refused to attend meetings if his staff did not have a Discussion Document™. Although this seems drastic, particularly when many of the items to be discussed were possibly trivial in nature, his staff soon became very skilled and comfortable using the new tool.

Appendix

The appendix for this white paper will be released in two weeks. Check the download site at that time.