Kilbride's Tools for Managers and Teams

RARE Meetings

What is it?

Good meetings are rare! This tool reminds you of the basic steps needed to make all of your meetings, RARE good meetings.

Good Meetings are RARE

- Roles are assigned and followed
- Agenda with times for each topic
- Record of Actions, Issues, Decisions
- Evaluation of meeting and team effectiveness

How do I use It?

❶ Clarify the **Roles** various team members will serve during the meeting.

TOOL TIP: Clarifying meeting roles is Step #2 for every tool in this Toolbox.

These roles can be permanently assigned to the same individuals for all meetings, or can be shared and rotated between members from one meeting to another.

Key meeting roles are identified and described below.

◆ *Scribe*--Serves as the team's record-keeper, takes notes during the meeting and records:

- Action items, with responsibility and deadlines;
- Decisions reached by the team, and
- Issues raised by the team, which cannot be resolved during the meeting.

TOOL TIP: See Meeting Aids (page xx), for a simple tool to capture Actions, Issues, Decisions during meetings.

The scribe usually publishes meeting minutes. Either the scribe or facilitator reminds the team to evaluate each meeting at the end.

- *Timekeeper*--the timekeeper watches the agenda, and notifies the team when the allotted time for a given topic is expiring. The group then decides whether to continue discussing this item or move on.

> HINT: It is the timekeeper's role to ensure the team has an agenda before the meeting begins.

- *Facilitator*--If the scribe is the team's record keeper, then the facilitator serves as the team's "discussion keeper". While all team members are expected to use effective Discussion skills, the facilitator pays special attention to ensure that…
  - ❑ Discussions stay on track.
  - ❑ Everyone participates.
  - ❑ As agreement is reached, items are brought to closure.
  - ❑ The team's ground rules are observed.

> TOOL TIP: See LISTEN (Discussion Skills), page xx), for better conversations.
>
> See Ground Rules (page xx), for possible team norms or rules.

> HINT: In some cases, the facilitator will be someone outside the team. Because they have no stake in the content of the team's work and can focus exclusively on the meeting process, trained external facilitators may also serve as scribe and/or timekeeper. Team members serving as facilitators should not attempt to fill multiple roles in the same way.

In addition to the three key meeting roles (Scribe, Timekeeper, Facilitator), other roles may include:

- *Participants*--Team members without other assigned roles are expected to follow the ground rules, use effective discussion skills, and contribute to the meeting process.
- *Meeting keeper*--Some teams have a support person to coordinate meeting logistics and administrative details. This role can also be shared and rotated among team members.
- *Sponsor, client, or customer*--This is who the team works for, the "owner" of a process or problem, or the "customer" of the team's outputs. They may or may not participate in meetings, but the team must always be aware of their needs and requirements.

- *Team leader*--While self-directed teams with shared leadership are becoming more common, most teams still have a designated leader, with authority and ultimate accountability for the team' s performance. In addition to doing "real work" like any other team member, the leader must also:

  - ❑ Ensure the team' s purpose and goals are relevant and meaningful.
  - ❑ Manage key relationships outside the team, especially with the sponsor and customers.
  - ❑ Build the commitment and skills of individuals and the team.

❷ In most cases, the **Agenda** is developed in advance and sent to team members. If not, then quickly build an agenda at the start of the meeting.

HINT:	Don' t block the agenda in tiny increments. Most topics should be no less than 1/10 of total meeting time. For example, if an all day meeting has lots of 10-15 minute blocks of time, you are being unrealistic about what can be accomplished in that length of time, or you are having meetings to share information you could communicate in other ways.

A blank *Meeting Agenda* worksheet is on the next page. It includes standard items at the start and end of the meeting, and provides additional space for:

- *Meeting Purpose, Date, Location and Time limits.*
- *Meeting Roles* (Scribe, Timekeeper, Facilitator, Participants).
- *Times* allotted to each topic.
- Person who will serve as *leader or presenter* for each topic.
- *Topic descriptions*, including its purpose and the tool or method to be used.
- The *Type* of item each topic represents. The acronym RAPID is useful as a reminder of the possible types of agenda items:

R = Report
A = Analyze
P = Plan
I = Idea generation
D = Decision

- *Preparation* required by team members prior to the meeting.

MEETING AGENDA

2. Roles

1. Project: ______________________ Scribe/AID Recorder: ______________________ Facilitator: ______________________

Meeting Date: ______________ Meeting Participants: ______________________ Timekeeper: ______________________

Meeting Purpose: Location: Limits = *From* *to*

TIME	**LEADER**	**TOPIC** (Description of Topic and Purpose or Process)	**TYPE** *"RAPID"*	**PREP**
		Review AGENDA for this meeting and agree upon topic priorities/times/sequence.	P	Review agenda
		Review AID from prior meeting and update status of assigned actions.	R&A	Review AID and update your assigned actions
		Review AID from this meeting to finalize assignments and due dates.	D&P	
		EVALUATE team's effectiveness. Identify opportunities to improve. Decide upon changes.	A&I&D	None
		SCHEDULE next meeting and develop agenda (with improvements).	P	Bring calendars

RAPID ◊ R = Report; A = Analyze; P = Plan; I = Idea generation; D = Decision

❸ It is essential for a team to produce and keep a **Record** of its work. It is usually the Scribe' s responsibility to ensure key items are recorded and minutes of the meeting are produced.

While any and all content that you deem important can be recorded, it is essential you capture at least three types of items.

As an "aid" to recording these important areas, many teams use a form like the blank *Meeting AID* worksheet shown on the next page.

The types of items recorded on the form include *Actions, Issues* and *Decisions*. The left-most column is used to identify the type of item by its initial, *A, I* or *D*.

An explanation of each follows:

- **Actions**--Specific actions the team has agreed to take as follow-up to the meeting. Since one or more individuals will usually be assigned and accountable for completing the assigned actions, you should fill out the columns identifying…

  - ❑ WHAT is the specific action to be taken?
  - ❑ WHO is assigned the action?
  - ❑ WHEN will the action be completed? The person assigned must agree with the due date.

- **Issues**--These are challenges, opportunities or areas the team agrees are important for it or someone else to address, but for which they cannot determine an immediate resolution, reach a decision, or develop a specific set of actions for addressing the issue.

  The list of Issues serves as a "parking lot" for team concerns which must be addressed in the future. This is the best way to keep the team moving when a specific topic or agenda item generates a great deal of discussion among team members, but no clear path forward can be identified. To keep the team moving forward, without ignoring legitimate concerns, record the Issue and proceed with the next agenda item.

  Since Issues frequently deal with boundary issues or relations with other teams or customers/suppliers, they will often require further clarification by the team leader or an assigned member outside the meetings.

  In other words, you will often record an Issue and assign an Action for someone to clarify the Issue as follow-up to the meeting.

  Issues are an important source of future agenda items. When building the agenda for future meetings, review old lists of Issues. If they have been sufficiently clarified, the team may be prepared to tackle them and reach resolution during the next meeting.

Tools for Managers and Teams

MEETING AID

2. Roles

1. Project: ______________________________ Scribe/AID Recorder: ______________________________ Facilitator: ______________________________

Meeting Date: ______________________ Meeting Participants: ______________________________ Timekeeper: ______________________________

Meeting Purpose: Location: Limits = *From* *to*

DATE assigned or agreed upon	**A?I?D?**	**WHAT** (is the Action assigned; Issue identified; or Decision agreed to by the team)?	**WHO**	**WHEN DUE**	**STATUS**

- **Decisions**--As the team reaches agreement on important matters, record these decisions. This is a very effective way to bring closure to a topic or item. By suggesting that the team' s decision be recorded, you will surface any lingering concerns.

  Once clarified and the decision recorded, the matter can be put to rest and the team can move on to the next item. Over time, the record of team Decisions becomes a living history of the team' s work. This is important to avoid revisiting decisions that have already been made, and can help the team make future decisions.

HINT:	A policy is simply a set of guidelines about how future decisions will be made. One of the easiest ways to develop policies is by reviewing past decisions. Once established, policies simplify and accelerate future decision making.

The *Status* column on the form is provided to remind the team to circle back in the future for updates on progress or completion of Action items, or changes in open Issues.

❹ The final step in ensuring you have RARE good meetings is to **Evaluate** both the meeting and the team' s effectiveness. Perhaps the most important step required to move from ordinary to exceptional meetings is a shift in thinking. Rather than viewing meetings as periodic *events*, see them as a key *work process* of the team, no different than producing a product, or delivering a service.

Below is a diagram showing a variation of the PDCA cycle for stages in the meeting process. When viewed this way, meetings become a work process of the team, which can be evaluated and improved, just like any other process.

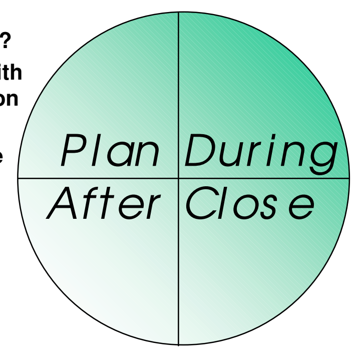
PDCA for the Meeting Process

Plan the meeting

- **Purpose**
- **Meeting absolutely necessary?**
- **Who should attend?**
- **Develop Agenda with changes based upon prior evaluation**
- **Individuals Prepare**

During the meeting

- **Review roles, agenda, ground rules**
- **Follow agenda, stay on track**
- **Record (AID) Actions, Issues, Decisions**
- **Process checks**



After

- **Publish record or minutes**
- **Implement actions**
- **Check on progress**
- **Plan next meeting**

Close the meeting

- **Clarify actions, deadlines, responsibilities**
- **Evaluate the meeting**
  - **What worked?**
  - **What didn't?**
  - **How can we improve?**

At key points during and at the close of each meeting, evaluate using one of the following methods.

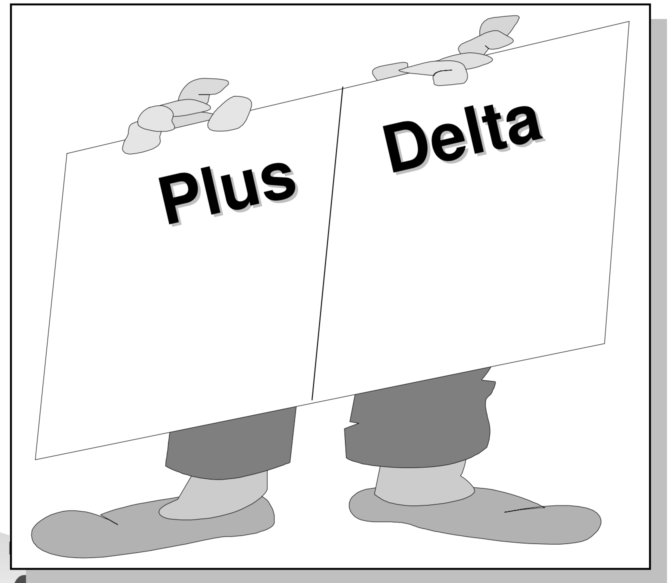
- **Plan**/**During**/**Close**/**After**--Create a form or flipchart like the table below, and use it to record the teams ideas about what works and what doesn' t during each stage of the meeting process.

	Plan	During	Close	After
What worked?				
What didn' t?				
How can we improve?				

- **Plus**/**Delta**--This is one of the simplest and most widely used evaluation techniques.

> Delta is Greek word for change.
>
> The symbol is •.

Divide a flipchart into two columns, like the illustration that follows.



Record team members ideas about Pluses and Deltas…

Plus	Delta
• What went well before this meeting, i.e., since the last meeting? • What went well during this meeting? • What should we keep doing?	• What didn' t work? • What can we do better? • What should we change or do differently in the future?

- **Sticky Plus/Delta**--This is a variation on the Plus/Delta technique that is especially effective when dealing with very large groups (more than 20).

  Rather than having participants state their Pluses and Deltas aloud for the scribe to capture, have participants write at least one Plus and one Delta on separate sticky notes and place them on a flipchart as they leave the meeting.

> TOOL TIP: Use the Affinity Diagramming technique, page xx, to group the feedback on sticky notes.

- **Finger Vote**--To quickly surface concerns of team members, ask them to rate the meeting by raising an appropriate number of fingers, 1-5, using the following:

> *1=hated it; 2=didn't like it; 3=OK; 4=liked it; 5=loved it*

  Allow those who vote 1-2 fingers to clarify their concerns <u>and</u> state what they would propose the team to do address them during future meetings.

- **Facilitator Feedback**--Another option is to have the person assigned as Facilitator for a meeting:

  - ❑ Observe and record team behaviors during the meeting, then
  - ❑ Give feedback to the team or individuals at break points or at the end of the meeting.

  There is some danger in this approach, particularly with teams in the early stages, or if the assigned Facilitator is not trained in giving effective feedback.

  To be useful, the team must recognize that the feedback is simply another form of data, and the feedback giver must evaluate without imposing his or her "way" of doing things.

  While this can be effective, it is not recommended for teams in the early stages, or when individuals have "axes to grind" with one another. It works best when the feedback-giver is a neutral third party.

> HINT: If assigned to observe your team' s process, review prior meeting evaluations to identify what behaviors to look for.

Whether giving feedback to a full team or individuals, consider the guidelines on the next page.

FEEDBACK Guidelines

- ❑ *Ask before you coach*--Don' t give feedback unless the recipient has agreed to have you do so.
- ❑ *Not everything needs to be public*--Some feedback is best provided to individuals, rather than the full team. Use your judgment.
- ❑ *Here and now*--Comment on this meeting. No history.
- ❑ *Speak for yourself*--Don' t say "the team liked.." or "Dan felt.."
- ❑ *Comment on actions or behaviors*--Don' t comment on the person. For example, don' t say "Timyou are quick to cut others off." Instead, say "Tim, I noticed on three separate occasions, you cut others off before they were finished speaking." By phrasing it this way, you are commenting on what Tim did, not on how Tim is!
- ❑ *State observations and inferences*. Without judging, describe what you saw and explain the inferences or assumptions it led you to, e.g., "When we changed subjects without reaching any kind of decision, I assumed we were avoiding x."
- ❑ *Be specific*--What specific behaviors were effective and why? Which were not effective and how might it be done differently? How often did they occur? To this end, it is helpful to record the frequency of specific behaviors. If participation is a problem, record the number of times that dominant or reluctant individuals speak. Watch to see if individuals direct their comments to other individuals, versus the team as a whole.
- ❑ *Be constructive*--Don' t maim. Point out the positives.

◆ **Surveys**--Another approach is to have team members complete a survey such as the one on the next page to evaluate team effectiveness. This can be administered prior to a meeting, and the results used at the outset of that meeting, to identify potential problem areas and get the team to agree on ground rules for addressing them. With such a survey, you can keep individual ratings confidential, and report only overall group scores.

To summarize the data, either:

- Multiply Performance x Importance to determine the highest scoring (top priority) survey item, or
- Calculate an Average and Range for each item. For example, if 7 team members rated a particular question as follows: 2, 3, 1, 4, 3, 2, 2

Average = sum ÷ # of responses

= 2+3+1+4+3+2+2 ÷ 7 =

= 17÷ 7 = 2.4

Average Performance scores from 3-5 are Opportunities. Average scores < 3 are strengths.

The Range is the highest rating minus the lowest. Ranges of three or more indicate enough diversity of opinion that the team should discuss the matter. For the example above:

Range = high - low = 4 - 1 = 3

Evaluation of Team and Meeting Effectiveness

Evaluate your team' s effectiveness by answering the questions below. Do members of this team…		Performance *1=Very Good 2=Good 3=So-so 4=Poor 5=Very Poor*	x	Importance *1=Trivial 2=Not Imp. 3=Somewhat Imp. 4= Important 5=Very Import.*	=	Score
1.	Come to meetings prepared?	1 2 3 4 5	x	1 2 3 4 5	=	
2.	Remain present during the entire meeting?	1 2 3 4 5	x	1 2 3 4 5	=	
3.	Participate fully and appropriately?	1 2 3 4 5	x	1 2 3 4 5	=	
4.	Use tools and methods to analyze problems, make decisions, etc.?	1 2 3 4 5	x	1 2 3 4 5	=	
5.	Follow through on commitments made during meetings?	1 2 3 4 5	x	1 2 3 4 5	=	
6.	Have one conversation at a time?	1 2 3 4 5	x	1 2 3 4 5	=	
7.	Avoid interrupting speakers?	1 2 3 4 5	x	1 2 3 4 5	=	
8.	Avoid revisiting a prior topic or decision?	1 2 3 4 5	x	1 2 3 4 5	=	
9.	Address issues honestly and openly?	1 2 3 4 5	x	1 2 3 4 5	=	
10.	Deal constructively with conflict or differences of opinion?	1 2 3 4 5	x	1 2 3 4 5	=	
11.	Offer new, creative, or unconventional ideas?	1 2 3 4 5	x	1 2 3 4 5	=	
12.	Assign and follow meeting roles (scribe, facilitator, timekeeper)?	1 2 3 4 5	x	1 2 3 4 5	=	
13.	Develop and adhere to realistic agendas, with times for each topic?	1 2 3 4 5	x	1 2 3 4 5	=	
14.	Record Actions, Issues, and Decisions agreed upon during meetings?	1 2 3 4 5	x	1 2 3 4 5	=	
15.	Evaluate team and meeting effectiveness using Plus/Delta, etc.?	1 2 3 4 5	x	1 2 3 4 5	=	

A Sample of Tools for Managers and Teams