

Power Packed Meetings – Part 1
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November 2005

I often say that no matter how you look at it, an organization is simply a group of people working towards the same goal. The organization is only as successful as the strength and the quality of the relationships between the people. And how do people build relationships? Through meetings and conversations: bilateral meetings (one on one), team meetings, divisional meetings, cross-functional meetings, Communities of practice meetings, departmental meetings or stakeholder meetings.

The work only gets done if people have an effective way of coming together face to face to discuss *what* needs to be done and *how* it needs to be done. Facilitation allows for power packed meetings by ensuring that you have a *Purpose*, a *Plan* and a *People focus* in all meetings.

The Three P's:

- **Purpose:** Clarity on your objectives. Definition of what success will look like.
- **Plan:** Methodology (tools and processes). Road map to reach your objectives.
- **People:** Active participation which leads to commitment. Balance between the head and the heart.

This first article in a series of three will focus on the first P: the purpose.

PURPOSE

First things first: you need to be crystal clear about the purpose for coming together. Why are you calling a meeting or organizing an event? What do you want to accomplish and why?

The objectives of the meeting and how you define success become the guideposts that will determine which process and which tools are needed in order to achieve what you set out to do. Once the objectives are clear, you can work your way backwards to determine what needs to happen and in what sequence in order to get you there.

Does this scenario seem familiar? It is 9:00 a.m. on the second Friday of the month and you are sitting around a boardroom table with your colleagues. It is your bimonthly staff meeting. You are not sure what is on the agenda today – you only know that the boss will be talking and you will be listening and maybe make a few comments here and there. You also know that even though it is scheduled for an hour it usually extends way past that. You are in the midst of this meeting trying to stay alert but interest wanes because the same topics were being discussed at the last three meetings. It actually feels like a time warp – you seem to be having the very same conversation...no decision has been made and apparently, there's been little movement on these files since the last time. "Why am I here?" you ask in frustration. "Because it is the second Friday of this month

and we always meet on the second Friday and on the last Friday of each month – it’s just what we do in this team!”

Do you want to be a workplace hero? Do you want people to come willingly and happily to your meetings? Do you want people leaving your meetings with a sense of satisfaction for a job well done?

Well here is a way to change that meeting paradigm - before even scheduling a meeting (or attending a meeting for that matter) ask yourself, “What is the purpose of this meeting?” The purpose should dictate the tools and the process for the meeting.

There are five types of meetings:

1. Business meeting:

The business meeting is the very traditional and typical “boss meets staff” type of meeting. In this kind of meeting the “Roger’s Rules of Order” set the stage. There is a chairperson sitting at the head of the boardroom table, subordinates sit on the “sidelines”, someone takes the minutes, decisions are made by majority votes, there are a minimum number of people necessary to have a quorum, etc...

2. Problem solving: There is a glitch in the system and we need to fix it before it creates more errors and delays – let’s call a meeting! Authors such as Edward de Bono (1999) have written extensively about creative problem solving techniques that taps into both sides of the brain when looking for solutions to a problem: the left side of the brain (the more logical, sequential, analytical side) and the right side of the brain (the more creative and visionary side). De Bono has developed several approaches to creative problem solving including the *Six Thinking Hats* (1999) which is a disciplined process that teaches us to separate our thinking into six valuable functions and roles: facts, optimism, judgment, feelings, creativity and process management. The *Six Thinking Hats* is a tool that enables team members to be focused and to the point and more importantly, to look at *all sides* of an issue. It neutralizes employee rank and status and puts everyone on an equal playing field.

Another useful concept in problem solving is the diverging-converging concept. David Kolb’s (1983) theory on learning styles proposes four styles: diverger, assimilator, converger and accommodator. When you want to find a solution to a problem it is important to start with techniques that will help generate a lot of ideas such as brainstorming – it is the *diverging phase*. Think of it as a *flood light*: shedding light in all the nooks and crannies of a problem to make sure you have looked at all the possible angles. Then you need to move to the *converging stage*: give form and structure to the bulk data you generated in the diverging stage by sorting and categorizing ideas and setting clear criterion for decision making to help you choose the solution that is best suited for your situation. The metaphor of a *spotlight* helps convey the notion of streamlining and focus necessary at this stage.

The NMC booklet entitled *Tools for Leadership and Learning* (2002) describes many tools that are well suited for problem solving meetings: *Workout*, *Interview Matrix*, *Process Map* and the *Five Why's*.

3. Information Sharing Meeting: We've all been there – sitting in a hotel ballroom for the annual All Staff meeting listening to the series of PowerPoint presentations that are being read by some important people at the front. This is how we share information formally in our organizations. (If you ask me you get a lot more information out of the hallway and water cooler conversations though...). PowerPoint is a way to package and share information in a standardized way. With those advantages comes real risks: if someone “hides” behind the PowerPoint and simply reads what is written on the slides without elaborating for fear of “saying the *wrong* thing” it can be fairly sterile and superficial. What was supposed to be only an *aid* to share information risks becoming the only *means* of information sharing.

There are many other ways of sharing information that can be more interactive and meaningful. For example, a *Talk Show* is a dynamic alternative to the series of “key note” PowerPoint presentations or the traditional Panel Presentations where each guest reads their notes in turn. Guests sit in a semi circle in comfy chairs on stage and a “host” engages them in a lively conversation much like Oprah would do with her guests on her Talk Show. It becomes a more interactive and maybe even a more entertaining (and therefore more impactful) way to share information.

The *Press Conference* offers an alternative to the traditional Question and Answer periods that usually follows the formal presentations at conferences or at the All Staff meetings. After a brief presentation, the speaker steps out of the room while the participants work with colleagues at their tables to craft one or two burning questions that they would like frank answers to. This allows for some filtering of the questions to identify key and strategic questions that need to be asked. This process also ensures a more equitable participation from everyone in the room rather than a select vocal few.

4. Consultation Meeting: First, let's define what a consultation truly is. Too many times I have been asked to facilitate consultation meetings that were in fact information sharing meetings in disguise. The priorities had already been set, the report had been written and there was also a draft action plan to implement it! Calling this type of meeting a consultation creates false expectations and can lead to frustration on the part of participants (and of the facilitator!). If a meeting is to be called a consultation it implies that the participants have an opportunity to actually shape the outcomes. In a true consultation meeting participants' points of view are solicited, their recommendations are encouraged and their input will be apparent in some, or in many aspects of the final product.

Tools like *Open Space* and *Courtyard Cafes* are ideal for consultations. They are large group processes which allow for a “whole system” to be in the room thinking and dialoguing together. What we mean by “whole system” is simply that all levels and all areas of the organization are represented, from top to bottom and left to right, so that you

have the whole picture instead of just a slice of the picture. Finance people can talk to policy people and program people can talk to human resource people. And no need for “buy-in” exercises after this type of event because everyone who has to “buy-in” was in the room helping shape the outcome – they’re already on board!

5. Negotiation Meeting: In negotiation meetings both sides must have the opportunity to express their positions in a safe environment. The trick in negotiation is to start by identifying the common ground between both parties. With that as a building block, you can tackle the more contentious issues. Margaret Wheatley (2004) talks about the *geometry of meetings*. In her article entitled *Solving, not Attacking, Complex Problems A Five-State Approach Based on an Ancient Practice*, Wheatley describes a model that suggests the *shape* in which we meet has an impact on our conversations. For example, our First Nations people have taught us that sitting in a *circle* convey a message of equality where everyone has a chance to speak and be seen. Wheatley writes, “circles create soothing space, where even reticent people can realize that their voice is welcome”. She explains that when there is conflict in a group you need to start the session sitting in a *circle* to allow for a calming and quieting period before you encourage people to sit around a *square* table and literally "take sides" as they express their different points of view on the issue. The group then moves to a *half-circle* to signify that even though they have made progress in understanding the problem they are only half way there – they still need to identify what is missing in order to come to some agreement. This stage moves people from conflict to the first stages of resolution.

Other valuable tools in negotiation meetings are the *Win-Win Tool and Interest-based Negotiations* (Chartier, 2002). The *Win-Win Tool* encourages groups on each side of an issue to look at the other side’s point of view to try to resolve the problems and challenges in ways that are acceptable to all. *Interest-based Negotiations* have a few key principles, which include knowing your BATNA (Best Alternative To a Negotiated Agreement), focusing on interests not positions, and separating the people from the definition of the problem. The *Issue Analysis* (Lapointe & Chartier, 2004) is a facilitated process that allows all issues to be surfaced in a confidential and positive environment. Once the issues have been posted on the wall and sorted into themes, what was initially a negative is flipped to a positive: if these are the issues that are impeding our work as a team then what are some concrete action steps we can take to improve on this situation? What will be done, by whom and by when?

The Follow-Through

So there you have it: five types of meetings and five sets of tools and processes that are best suited to their purpose. You will get kudos from your colleagues when you put these principles into practice and you will gain a good reputation for leading effective meetings. (No small feat in today’s overtaxed and perpetually changing organization!)

But this is not the end of the story... As discussed in *Facile* (Lapointe & Chartier, 2004) the follow-through is key. If there are no observable results from a meeting, people will start doubting the legitimacy of meeting in the first place and pretty soon will not want to

attend meetings because “What’s the point anyway? Nothing is ever done with what we say!”

After a meeting, make sure that:

- The logistical requirements were carried through: materials gathered, recommendations clear and evaluations complete
- You capitalize on the momentum created by the session to get things done – people are seeing some new possibilities and feeling more positive after a successful event so they are more likely to get involved if you make clear requests
- Identify small practical action steps for quick successes and implement them right away to build confidence and morale

The paper trail...

When we see something in black and white it seems more real and more valid somehow. Record on paper the recommendations, the decisions or the plans that resulted from your meeting and distribute promptly to participants to let them know in a concrete way that they have been heard and that their input is now part of the corporate memory. It validates their participation in your session.

Different outputs are expected from different types of sessions. For example:

- *Information sharing meeting*: Distribute Power Point presentations and background materials.
- *Consultation event*: Distribute “As Was Said” report to participants. Send final report and provide regular updates on the implementation plan and any resulting policy / process changes
- *Planning session*: Distribute resulting action plan and set-up implementation committees or work groups. Have committees provide regular update reports. Revisit the plan and evaluate progress regularly.
- *Decision-making “workout”*: Send e-mail confirming decisions taken, accountabilities and timelines. Give regular update reports.

What makes a meeting effective and powerful is as much a function of the front-end work (identifying the purpose and appropriate process) as the tail end work (follow-up documentations and actions). Contrary to common belief, what makes a meeting a *good* meeting is not just what happened between 9:00 and 10:30 when you sat down with your colleagues at the boardroom table to talk. Preparation and follow-up is key.

So what do you think? Will you become a caped crusader of effective meetings in your own organization? I bet you would have quite a fan club if you did...

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