A Meetings Tool Kit

prism
LEARNING SOLUTIONS

Ground Rules

Ground rules are a set of standards for meeting behavior that participants agree to up front based on a shared belief that they will have a positive impact on the quality of their meeting participation and results.

BEST PRACTICES:

- ✓ Develop them collaboratively whenever possible
- ✓ Confirm mutual understanding of the purpose and meaning of each one
- ✓ Keep the list manageable; no more than 10
- ✓ Keep the list realistic
- ✓ Post them in full view
- ✓ Refer to them as a process check when things aren't going smoothly
- ✓ Hold yourself and others accountable to them
- ✓ Areas of consideration….
    - Level and quality of participation expected
    - How decisions will be made
    - Level of preparation expected
    - Meeting management standards

Here are examples of some common ground rules that may work for your group or team.

- Respect the input and opinions of others
- Seek first to understand, then to be understood
- Own what you say and contribute
- Be accountable for your opinions
- No interrupting
- Contribute openly
- Differing opinions are expected
- Work toward consensus in all decisions
- Once a decision is made, support it
- No toxic humor
- Have fun
- Discussion opinions stay private – in the room
- No multi-tasking
- Cell phones and pagers off
- Ask questions – take responsibility for ensuring you're on the same page as others
- Start on time, end on time

Managing Meeting Disruptions

Aside from the diligence required to Plan a meeting, then successfully pulling off the steps of Opening, Conducting, Closing and then Following Up, managing disruptions is sometimes the most difficult thing about leading a meeting. Those disruptions most often come in the form of participant behaviors, whether intentional or not, that impact one or more of your goals.

It is important to recognize that disruptions can dampen the energy and engagement in a meeting. Handled well they are only a speed bump.

WAYS TO DEAL WITH "DISRUPTORS"

When a participant raises a topic or concern that is not on the agenda, first make sure is it not connected in some valid fashion. **RESTATE THE ISSUE USING YOUR ACTIVE LISTENING SKILLS**. Ask for ***clarification***, seek ***additional information***, listen well for a ***connection***. Keep in mind that "disruption" often leads to ***innovation***. If it is not connected, it is an "off-track" issue. Once determining it is not directly connected to the goals of the current meeting, decide with the group which approach to take.

Adapt your Agenda to Deal with It Right Away

- ✓ Let the participant know that the issue does not fit on the agenda of the current meeting.
- ✓ Ask the group to decide if it can/should be added to the current agenda.
- ✓ Adjust times for agenda items or the meeting if and when you have ***all participants'*** permission.
- ✓ Add the item to your meeting process using the tools available.

A discussion about changing the agenda can also be a time stealer. Take care not to lose control – consider a lightning round to get everyone's opinion, then make the call based on what you heard.

Add it to your Parking Lot

If you or the group decides that the issue is not a fit for the current agenda:

- ✓ Let the participant know that the issue does not fit on the agenda of the current meeting.
- ✓ Write the name of the issue on the Parking Lot chart, or in the meeting notes if they are visible.
- ✓ Let the participant know what will happen with the issue.
- ✓ Ask for readiness to move back to the agenda. (If needed, be assertive; insist on moving back to the agenda.)
- ✓ You may want to delegate responsibility to the participant who raised the issue for the follow up measures.

Diffuse

If the participant is out of sorts:

- ✓ Acknowledge/appreciate the person's willingness to contribute the idea or topic.
- ✓ Let the participant know that you are equally passionate about the goals of the agenda.
- ✓ Ask how the participant would want to proceed on the new issue; ask other participants for suggestions.
- ✓ Determine the follow up on the action.
- ✓ Return to the agenda (consider following up with the participant after the meeting).

Refer to the Ground Rules

If disruptions are an ongoing factor, consider the types of behaviors that occur and build the desired behavior into the ground rules. Use them to hold each other accountable.

CLOSING A MEETING

Summarize and Review

Summary and review are critical to ensure everyone ends up with the same understanding of what has been discussed, decided, planned and implemented.

"The measure of a conversation is how much mutual recognition there is in it; how much shared there is in it. If you're talking about what's in your own head, or without thought to what people looking and listening will feel, you might as well be in a room talking to yourself."

Dylan Moran, Irish Comedian

Verbal Commitments

The idea of verbal commitments is an accountability tool and a way to uncover any unspoken concerns or dissent.

A couple of common uses are…

Important team decisions

A specific use of the "round robin" technique, each participant verbalizes commitment to a decision.

Action Plans

Ask each person who has an action item for a verbal commitment to the task and due date.

Look Ahead

What's next? Make sure you don't lose momentum by not identifying:

- The next meeting time/date
- What is to be done between now and then
- What participants can expect in terms of follow up

Ice Breakers

As the name suggests, these sessions are designed to "break the ice" at an event or meeting. The technique is often used when people who do not usually work together, or may not know each other at all, meet for a specific, common purpose. Ice breakers are an excellent tool when well designed and facilitated (think SIMPLE) and when there is “ice” to be broken. Otherwise, they can be perceived as a waste of time.

Consider using an ice breaker when:

- Participants come from different backgrounds
- People need to bond quickly to work towards a common goal
- Your team is newly formed
- People from a variety of areas and/or levels are participating
- The topics you are discussing are new or unfamiliar to many people involved
- As facilitator, you need to get to know participants and have them know you better

BEST PRACTICES:

- ✓ Avoid asking people to take a significant social risk
- ✓ Consider your participants and their personalities
- ✓ Consider if the ice breaker will help people feel comfortable, establish a level playing field, set a collaborative tone, etc.

Examples:

A Characteristic: in addition to the usual introduction elements, ask participants to assign themselves a descriptive adjective that begins with the same letter of their first name, e.g. Creative Carl, Enthusiastic Emily, Tactful Tracy.

The Little-Known Fact: in addition to the usual introduction elements, ask participants to share one little known fact about themselves. This "little known fact" becomes a humanizing element that can help break down differences such as grade/status in future interaction.

True or False: ask your participants to introduce themselves and make three or four statements about themselves, one of which is false. Now get the rest of the group to vote on which fact is false.
As well as getting to know each other as individuals, this exercise helps to start interaction within the group.

Interviews: ask participants to get into twos. Each person then interviews his or her partner for a set time while paired up. When the group reconvenes, each person introduces their interviewee to the rest of the group.

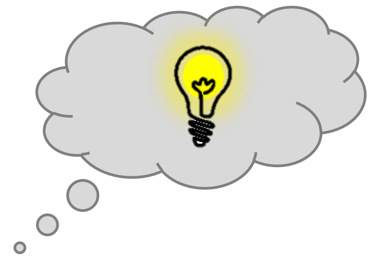
The Human Web: this focuses on how people in the group inter-relate and depend on each other. The facilitator begins with a ball of yarn. Keeping one end, pass the ball to one of the participants to introduce him- or her-self and their role in the organization. Once this person has made their introduction, ask him or her to pass the ball of yarn on to another person in the group. The person handing over the ball must describe how he/she relates (or expects to relate) to the other person. The process continues until everyone is introduced.

Source and further reading: [MindTools Article]

Warm Up Activities

While warm up activities can also have an "ice breaker" impact, their primary goal is to get peoples' heads into the room and on the topic at hand. It is all about readiness to be a strong contributor.

This is a great tool for any meeting, but especially for any meetings where you need people doing their best thinking and/or absorbing a great deal of information.



BEST PRACTICES:

- ✓ Keep it simple
- ✓ Make it something that everyone can feel confident contributing to
- ✓ Keep it short and fast-paced

Examples:

Word Associations: have the group generate a word list or word "cloud" associated with the topic. Another variation is to bring in a word "cloud" or list and ask each participant to select a word that stand out or intrigues them about the topic, and why.

Word Cloud Resource: www.wordle.net (requires Java)

Picture Associations: bring in a variety of pictures, such as stock photos or magazine pages, and have participants select one that they think relates to the topic and why, or have smalls group create a collage that represents the topic and share with the large group.

Know /Want to Know: in small groups, ask participants to make a T-chart listing everything they already know about your topic on the left and what they want to know on the right. This can also help you set priorities for sharing information.

Burning Question: have each participant offer one question they have the topics being covered.

Problem Solvers: group participants in small teams to work on some problem together. This is not to solve a problem on the agenda, but to get them into the collaborative mind frame.

Brainstorming: ask participants to brainstorm about a low-risk issue at the outset of a meeting. As a mental shift during a meeting, introduce a lateral thinking brainstorming technique, such as generating ideas that do the opposite of what we are really pursuing, e.g. ideas for having the worst customer service.

Fears, Hopes, Expectations: manager(s) and individual team members break into separate groups. Ask the groups to create a chart of their top fears, hopes and expectations for the meeting or the topic. Have a spokesperson from each group share the results with the other group.

Facilitator Best Practices

MANAGING MEETING TIME

Arrive early
Set up the room, check the Lifesize® system and any other technology.

Leave Transition Time in the Schedule
Scheduling often defaults to 30 or 60-minute intervals. Meetings get stacked back to back for people and meeting rooms. Allow at least 5 minutes for transitioning. Schedule meeting rooms in advance and for a period afterwards if set-up and take-down is needed.

Start and End on Time
Start and end on time. Be a model and example—don't waste the time of people who are interested and on time. The latecomers will learn that you start and end on time, and begin to honor the established times.

Integrate Latecomers
Don't stop to update late arrivers—this is an affront to those who are on time. Likewise, don't publicly embarrass latecomers. Quietly indicate what page or agenda item you are on and have them join in where the group is.

Agenda Timing
SITUATION: The group is discussing a topic that was allotted 10 minutes and you have one minute left. How do you manage this meeting time issue?

SUGGESTED APPROACH: Do a Process Check - discuss with the group to a) spend more time now and lengthen the meeting or take time from other agenda items, or b) set a time outside of the meeting to continue the discussion - end the discussion and place it on a parking lot flipchart with a plan how to address it later.

MANAGING PARTICIPATION

Set a positive tone
Greet each participant as they enter the room. Express interest and enthusiasm about the agenda, and the opportunity to achieve meaningful goals. Call people by name. (Use tent cards or name tags if needed.)

Body Language
Use open nonverbal postures, and monitor non-verbal cues of participants.

Leading a Discussion
Ask open-ended questions to encourage input and discussion, e.g. "*What are your ideas to improve our success with projects?* "

Practice active, reflective listening techniques, e.g. "*It sounds like you are concerned* (reflecting feelings) *about the budget overruns on our project (*reflecting/paraphrasing content.)"

MANAGING TO OUTCOMES

Revisit Meeting Purpose and Goals Often

Recap/Capture
After each time block, recap the discussion and restate any decisions.

No Cliff-hangers
Before moving on to a new subject, make sure the group comes to some alignment.

Parking Lot

A Parking Lot (wall chart or online doc visible to participants) can be useful for various things—most commonly for dealing with extraneous issues, questions or ideas to be pursued further, topics that need substantial time to address, or topics that need a different set of participants to effectively address. It has the practical effect of capturing important ideas and concerns without spending meeting time that is designated for something else. It has the positive psychological effect that participants feel heard and have some level of assurance that their input will be addressed in the future, preventing distraction.

BEST PRACTICES:

- ✓ Post and bring attention to the tool early in session.
- ✓ Identify potential parking lot topics assertively (encourage all participants to help with this.)
- ✓ Make a quick decision about how each topic will be carried forward.
- ✓ Include Parking Lot items in meeting notes.

Parking Lot

A place to "PARK" topics that are:

- Important, but not on the agenda
- Need substantial time to discuss
- Should be handled offline, and/or by fewer or other people

TOPIC	WHEN / HOW TO ADDRESS

Force Field Analysis

Force Field Analysis is a useful decision-making technique. It was created by Kurt Lewin in the 1940s for use in social psychology, and is now used in business especially for go/no go decisions.

It helps you make a decision by analyzing the forces for and against a change, and it helps you communicate the reasoning behind your decision. You can use it for two purposes: to decide whether to go ahead with the change; and to increase your chances of success, by strengthening the forces supporting change and weakening those against it.

You use the tool by listing all of the factors (forces) for and against your decision or change.

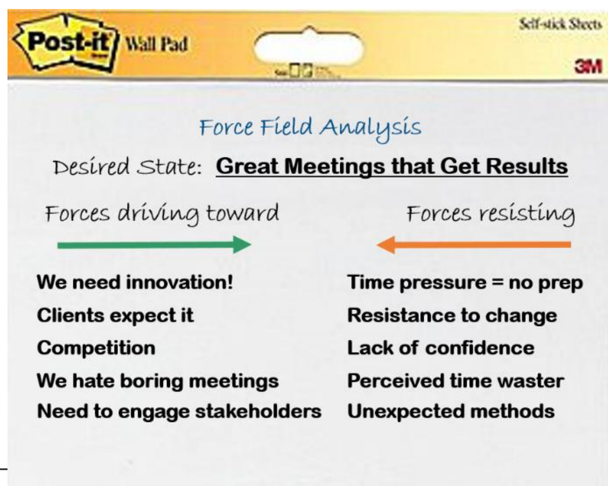
Areas to consider:

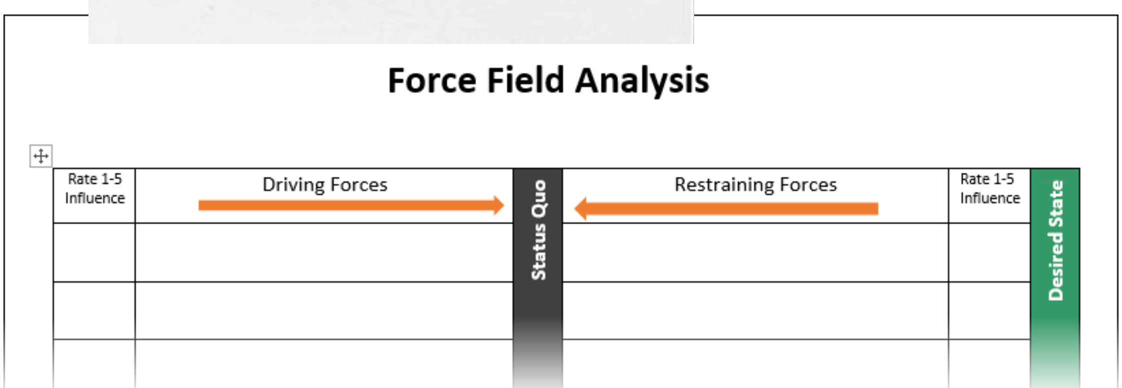
May the forces be with you.

- ✓ What business benefit will the change deliver?
- ✓ Who supports the change? Who is against it? Why?
- ✓ How easy will it be to make the change? Do you have enough time and resources to make it work?
- ✓ What costs are involved?
- ✓ What other business processes will be affected by the change?
- ✓ What are the risks?

Score each factor based on its influence, and add up the scores for and against change to find out which of these is greatest. You can then look at strengthening the forces that support the change and managing the forces against the change, so that it's more successful.

Example:





Force Field Analysis

Rate 1-5 Influence	Driving Forces	Status Quo	Restraining Forces	Rate 1-5 Influence	Desired State

PARTICIPATION BALANCERS

Round Robin

Sometimes referred to as a Listening Round, it is a simple tool whereby a meeting leader asks each person in turn to share input, give an idea or opinion, express their commitment or respond to a question. As you might guess, this is a way of balancing participation between more vocal participants who may tend to monopolize and quieter participants who may tend to hold back. It also ensures that silence is not mistaken for agreement or apathy, and everyone is on board and accountable for agreements made.

The meeting leader facilitates by:

1. Giving each person a turn to speak uninterrupted.
2. Use reflective listening, if appropriate, to ensure understanding.
3. Invite listeners to ask clarifying questions.
4. Thank the contributor.
5. Move to the next person in order.

Lightning Round

A simple, and effective tool for getting information from everyone in a short amount of time is a lightning round. Similar to Round Robin, but creates a high sense of urgency and momentum by virtually eliminating the temptation to hold the floor unnecessarily. It works especially well for “stand up” or other update meetings, beginning of meeting check ins, introductions, pulse checks, etc.

BEST PRACTICES:

- ✓ Create a sense of urgency
- ✓ Say “no explanations needed”
- ✓ Give a time expectation, like 30 seconds
- ✓ Give a very specific parameter like “top 3 priorities this week”

Optional – use a “toss-able” item to create lightness, momentum and mitigate awkward transitions.

Note-Storming

Nothing has revolutionized meeting facilitation as much as the sticky note! They come in myriad shapes, colors and sizes. Use them to get and organize input, especially from larger groups. Use them to go for quantity of ideas.

Note-storming is a broad term for using sticky notes to brainstorm, generate ideas and gather input.

BEST PRACTICES:

- ✓ MOST IMPORTANT – No judging, censoring, evaluating (positive or negative), discussing “how to,” implementation or feasibility of ideas. Keep it pure, creative thinking.
- ✓ Allow participants 1-2 minutes of individual thinking time on a question or statement, e.g. Generate as many ideas as you can on improving our vendor selection process.
- ✓ One idea per sticky note.
- ✓ Participants say their idea out loud and then post or hand to facilitator or “gatherer.”
- ✓ Participants discard ideas that are a duplicate of one already offered by another participant.
- ✓ Allow each participant to submit at least one idea before a free-for-all ensues.
- ✓ Encourage participants to build on ideas, connect ideas and group ideas together.
- ✓ Have a plan for how to organize and evaluate the ideas, either in the meeting or as a follow-up process.
- ✓ Be sure to close the loop with participants if ideas move to another stage without their active participation.

Affinity Grouping – Look for the core concepts that tie ideas together in order to group ideas for further work.

Dot Voting – Use sticky dots or marker dots as a way to collaboratively prioritize ideas using any criteria. Examples: ideas you think are potential quick wins, ideas you have the most enthusiasm to pursue, ideas you think are the most “out of the box,” etc.