



## MEETING EFFECTIVENESS TOOL

### DESCRIPTION

Like most adults, you might be spending a large proportion of your life in meetings and therefore it would be most worthwhile to improve the effectiveness of your involvement. Meetings revolve fundamentally around communication. This tool is a set of principles and guidelines as well as checklists to assist in making meetings more effective, primarily for you as participant, but also in the role of chairperson.

### PURPOSE

To make meetings more effective by encouraging the habits of:

- a. Challenging the **need for meetings** in the first place
- b. Playing a proactive, contributing role in meetings and gaining appropriate entry
- c. Listening & understanding by asking questions, restating and taking notes
- d. Sharing information, personal disclosure and initiating
- e. Building, supporting, helping and pulling people in

### DETAILED GUIDELINES

1. Although there are many different reasons, meetings are mainly held to **interactively exchange information**, which includes such non-tangible stuff as emotional data and hence the need for doing it face-to-face. By definition this means a two-way traffic of communication. The primary purpose of most meetings is to transmit, share or gain information including views, opinions, ideas and other mental 'goods' and to consult. The second reason is to seek involvement and commitment of others in finding solutions, exploring options and making decisions by leveraging the mental power of others and giving people "Einspruchsrecht" (the right to partake in decisions which affect them).
2. **The Golden Rule No. 1**: Have a clear **purpose for the meeting** and therefore challenge the **need for the meeting** in the first place and in particular the need for you to attend the meeting, if it is not your own. You have the right to say NO. There are many alternatives to achieve the points made in item No. 1 above, especially if we use technology – tele / video conferencing, emailing, etc.
3. **The Golden Rule No. 2**: However, once you are happy to attend a meeting, then fully commit to this decision and **come prepared**. The biggest problem is that we do not prepare for these meetings and that the members of the meeting do not play their proper role in these meetings. As a general rule, 50% of the time should be spent preparing for the meeting (including thinking time), 20% attending and partaking in the meeting and the remaining 30% used to take action, follow up and close out on agreed actions.

\*\*\*\*\*

*Copyright: Jürgen Tietz*

## MEETING EFFECTIVENESS

Preparation means knowing the purpose, what is expected of you, what role are you to play, what items in the meeting you have to answer for. **Do your 'homework'** before and not during the meeting. Most people suffer from the meeting paradox: **We don't have time to prepare for effective meetings, because we spend too much time in ineffective meetings.** Furthermore, we do not make it crystal clear who owns the action, what the result should look like and by when! We do not even have clarity about who owns each item on the agenda.

4. **The Golden Rule No. 3: 'Speak your thoughts'**. Meetings, as opposed to briefings or announcements, are a process of give (speaking) and take (listening) and it follows that you have a responsibility towards the others involved in the meeting to **give your share** of information / input. This includes specifically agreeing and supporting, but also disagreeing and opposing. How else are the others going to know how you feel or what's on your mind, unless you speak up. Silent agreement or disagreement does you and the meeting no good at all. Lay out your thinking, perspective, criteria or paradigms that justify your view. So often it's a case that there is no right or obvious answer or else there would have been little need to meet. A written brief or instruction could have sufficed.
5. **Golden Rule No. 4: 'Less is More'**. You know your subject matter well, but keep it simple and don't dilute one good reason or argument by making too many poor points. You will only expose an Achilles' heel in the process. Remember the paradox: **By presenting only the few critical facts, the audience will remember more of your message!**
6. **Golden Rule No.4: 'Strike a balance'**. Offer support, but do also oppose. Talk but don't hog the discussion. Listen but do ask questions. Initiate, but accept critique and **NO**. The age-old story of differentiating between your urgent and the important.
7. It's **Ok to oppose**. One purpose of a meeting is to explore different options and seek alternatives. This is not possible if all hold the same views and beliefs.
8. When partaking in a meeting you must make sure you know what's expected from you. **What role** should you play and is that your preferred role? Leader, facilitator, innovator, organizer, scribe, evaluator or finisher.
9. In order to benefit most from meetings, you should **put others at ease**. In that way they will play an active role in the process. This means establishing **rapport, actively listening, seeking understanding, giving or sharing** without trying to get something in return. This is what personal disclosure and sharing your comfort level is about. The point is to establish common ground as quickly as possible so as to have a foundation on which to build discussions.
10. During the meeting it's important to **tune into others'** wavelengths as well. Establish and act in line with their **interpersonal style**, particularly that of senior people with whom you often interact. Some persons are **results- or bottom line-** focused. Others want **detail** and background. Still others might be **friendly-** or **fun-** focused and enjoy an intimate or relaxed interaction. It also helps to **mirror people**. Their body language, vocal style and similar behavioral aspects, without directly mimicking them. It's the old story of 'When in Rome, do as the Romans do'. Use people's **names** and look at them when you do. Find reasons to **compliment** others in the meeting.
11. **Exercise your rights** when attending a meeting. You have the right to have your say, influence others, ask and seek understanding and to communicate your thinking, feelings, wants and needs. Rights do, however, come with **obligations**. In meetings you should honor your obligation to seek to understand others (first), get mentally involved and show initiative, be proactive and look for opportunities and be an active team player.

## MEETING EFFECTIVENESS

12. Often we find it difficult to get our **timing** right in **gaining entry** to the discussion. My advice is to not wait for the 'Amen'. Once you sense the speaker is 'approaching the runway' and you are ready with your contribution, 'take off'. If you wait for the other person to 'taxi to the airport building and disembark' first, you will 'miss the boat'!

So how do you know when the approach to the runway is taking place? Look for the 'landing flaps and the wheels being let down' - when the speaker starts making more pauses, repeating or restating what he has said, summarizing and concluding his 'argument'. In general, once you have understood the core point and its justification and the person is starting to garnish with additional justifications and 'small stuff', your chance to enter the discussion and 'interrupt' has arrived. Even though this tip has to be applied with utmost care, engage in **artful vagueness** at times. Phrases like "That's an idea" or "You've got a point" or "You may be right" or "That is interesting" can help to pull you in, but don't be dumbfounded if you are asked to elaborate. Just take off!

13. Shy, overwhelmed, scared and trouble with appearing vulnerable? **Afraid** of what others will think of you or, at worst, laugh about you? Not wanting to look stupid or make a fool of yourself? We all make mistakes, so **don't feel alone**. Many others will feel just the same. It's only those who do not contribute who will make only one mistake. The mistake. They miss the whole purpose of their presence! Value adding to the meeting does not equate to being loud and boisterous or hogging the center stage. Before the start of the meeting initiate the 'contact' by shaking people's hands, as this breaks the ice and makes both parties feel more at ease. One easy way to come out of your shell is to look around for someone else who is a little reserved and help by **pulling them in** with questions like "What do you think or what's your view?" That way you get pulled in yourself and get more courage to speak up as well.
14. **Intimidated** by the audience, especially senior people? They all made their share of mistakes - you don't get to the top without stumbling once in a while. Imagine them in their pyjamas as ordinary persons! No one can make you feel inferior, unless you let them. Don't lose your self-respect. If you are well prepared, then more than 95 % of your fears will never materialize. Boost your self-confidence by **envisioning** the meeting as a huge success with you playing your role and achieving your objectives. Think as if this was your own bread and butter business and you are selling to a key customer. The only way people will know you are shy or nervous is if your body language and your actions tell them.
15. Unless it is one of those all-important meetings that can change your future and even with those like a job interview, my advice is to behave naturally. Acting out of character will only get you into hot water. Remember that your **self-worth** is not on the line and you don't have to prove your value in every meeting. Others generally know you by your reputation and the results you achieve, so relax. Also it is not a competition, or at least it should not be. You will deliver a much better contribution if you are at ease and don't have to worry all the time about how others see you.
16. Listening is cardinal to meetings and often is more than half of what you will be doing. It follows thus that you should practise **active listening**. An old Chinese wisdom says that everything you do, you should do consciously. When eating, concentrate on the texture, taste and smell. When looking observe the color, form and detail. The same when listening. Concentrate; focus on the speaker alone and nothing else. Hear the voice, tone nuances, absorb and understand the contents of the message. Often we hear the words but we don't get the message or grasp the meaning of what is being said, because we are busy thinking of what we are going to say next. We are just waiting for a gap or our turn to talk. We are so clever, we have thought already of the next line of dialogue before the person has finished talking. Beware: don't busy yourself with your own 'take off' (input) so much that you lose track of the discussion. Grab your thought or the point you

## MEETING EFFECTIVENESS

like to make by making a note of the key words and then refocus on the discussion. Don't think through your whole argument in detail. Prepare for take off; don't simulate the whole flight! We often tend to do a running comparison in our mind, with what we are hearing and our existing paradigms, beliefs, knowledge and then either agreeing, disagreeing or even jumping to conclusions. Instead, we should listen for something new, a new angle, a different perspective, a new insight or wisdom. We should listen non-defensively and with compassion. The essence of empathetic listening is not that one agrees with someone; it's that one fully understands the other person.

17. **Do you really listen?** Ask yourself: Do I jump to conclusions? Do I finish other people's sentences? Do I keep interrupting? Do I carry on doing something else while at the same time pretending I am concentrating on what is being said? Do I hear and understand before I take my turn? We have been taught to seek solutions, not necessarily how to find the right questions. **Listen first, solve second!**
18. Active listeners are not reserved and quiet in a meeting, but rather they **ask** lots of probing, clarifying and confirming questions. They **paraphrase**, make **eye contact**, **nod**, **take notes** and otherwise indicate their understanding. Use a book to make and keep these notes and not loose pieces of paper. They are often a useful reference to fall back on. Active listeners give **feedback** so that the meeting knows if they accept or reject what's being said and where they stand on issues.
19. The bottom line to being effective in a meeting is based on how **well prepared** you are and how well you know the subject matter. Having all your ducks and expertise in a row by definition brings with it an enormous amount of **self-confidence**. It takes away the fear and commands an aura of respect. Take 5 - 10 minutes to quieten your mind, refresh the agenda and focus on the purpose of the meeting. It will pay off tenfold!
20. It follows that the habit of calling **impromptu, emergency meetings** is a sign of mainly poor planning and having the priorities wrong. Focusing on the urgent matters (Quadrant One in Steven Covey's<sup>1</sup> priority matrix), often leads to a vicious cycle where urgent is followed by more urgent. This leaves little or no time for important matters like the long term, vision, development and growth. This 'biting your tail' seems like a lot of **tempo**, but in reality it is leading to inefficiency and ultimately getting less of the right things done!

## METHOD / TECHNIQUE / TOOL

This section contains the following:

The **MEETING EFFECTIVENESS TOOL** is a checklist to help form the habit of contributing at meetings. Use the list to monitor your behavior by making a tick each time you use a specific behavior. Ever so often or during a coffee break glance at the checklist to see how you are doing. Keep a record so you can measure your progress and once in a while 'sharpen the saw'.

**HOOKS FOR GAINING ENTRY** is a list of phrases to use to gain entry into the discussion once you see an 'approach to the runway'. Modify this list and memorize five phrases you feel comfortable with.

The **10 TIPS FOR MEETINGS** speaks for itself and so do the before & after the meeting checklists.

---

<sup>1</sup> *The Seven habits of Effective People*, by Steven Covey

## MEETING EFFECTIVENESS

### MEETING EFFECTIVENESS TOOL

Checklist to develop a habit of playing a proactive role and adding value

#### Why am I here?

Asking questions . . . . .

Restating or summarizing . . . . .

Initiating / proposing - proactive . . . . .

Answering / responding - reactive . . . . .

Sharing or disclosure . . . . .

Building or supporting . . . . .

Disagreeing or opposing . . . . .

Helping and pulling-in . . . . .

#### What's the purpose?

Playing my role?

Supporting the chair & team - process?

Taking notes & noting my actions?

My body language - eyes, ears, smile, head and hands?

### SIDELINE PLAYER OR ON THE PITCH?

### HOOKS FOR GAINING ENTRY

Make your own list of questions to use as 'crutches'

1. Let me build / add / support / enlarge on what was said . . .
2. To pick up on what has been said . . .
3. Just to offer a different perspective / view / argument to . . .
4. Looking at this in a different light / another angle . . .
5. An alternative / new approach could be . . .
6. Taking a lesson from . . .
7. Changing the topic for a minute . . .
8. Turning this around / reversing / modifying / eliminating . . .
9. Following on / linking / expanding / combining / adapting . . .
10. If you are finished / done, I'd like to . . .

## MEETING EFFECTIVENESS

### 10 TIPS FOR MEETINGS

- 1. Why have you been invited?** Establish, well beforehand, the purpose of the meeting and your role. If you can't benefit or contribute, challenge your presence with the chairperson
- 2. If you attend**, then prepare. Play your role and complete your action items. Seriously commit yourself and don't insult others with lame excuses or arriving unprepared. Don't use an apology-messenger
- 3. Arrive on time.** Being late matters to those waiting. Get there in time to compose yourself, focus your mind and go over your notes. In your time schedule, keep enough 'white space' [unplanned for time] to catch up or do important matters<sup>2</sup>. Don't over-commit
- 4. If delayed**, use a [cell] phone. It's nothing but downright courtesy
- 5. Start on time** and establish a culture of punctuality. This will also help to instill the discipline of keeping to promised delivery dates and complete actions
- 6. Proportion and pace** time spent relative to the importance of the matter under discussion. Deal with urgent items swiftly and ruthlessly. Stick to the agreed duration
- 7. Keep it concise.** Holding meetings on site and on your feet will achieve this. Meet more often, but shorter. Meet about fewer issues and demand a bias towards action and results. Avoid the habit of impromptu, emergency meetings.
- 8. Keep a balance** between formal versus having fun. If it's too formal it kills creativity, but no structure ends up in chaos
- 9. Keep hand-written** notes. Who does what, by when and hand out photocopies at the end of the meeting. This assists furthermore with agreeing actions and summarising
- 10.** It follows that **first-thing-in-the-morning meetings** put you under stress, driving and worrying about who's waiting for you. Also, rather use the early mornings for more productive activities thinking and planning important tasks

---

<sup>2</sup>*Don't sweat the Small Stuff at Work*, by Richard Carlson