

## **Proper Planning Stops Time Waste at Meetings**

**By Leonard J. Moisan, Ph.D.**

As we progress further into our high-tech society, John Naisbitt's prediction in "Megatrends" that we would have a corresponding need for "high-touch" relationships and increased communication appear to have been quite accurate. While many examples are available of activities that stem from our need to connect with one another and our desire for better communication, none is more evident than the proliferation of meetings that seems to be occurring within organizations.

Meetings can serve an important function in achieving objectives. If they are not well planned and executed, however, they probably will be viewed as a waste of time, inhibiting rather than promoting progress. If you are a manager or supervisor, it is quite probable that you are responsible for the success – or failure – of meetings. Your professional credibility can be enhanced by running an effective meeting.

To enhance the effectiveness of a meeting for which you are responsible, consider these suggestions that cover planning, execution and follow-up.

### **Planning**

According to Stephen Covey in "Seven Habits of Highly Effective People," highly effective people "begin with the end in mind." They start any activity with a clear understanding of their destination. The concept, says Covey, is based on the principle that all things created twice, meaning there is first a mental creation, followed by a second physical creation.

For example, before putting an addition on your house, you first think about what you want and try to visualize it. Next, these ideas should be discussed with an architect who reduces them to a blueprint. Important questions must be answered well before the first materials are purchased or the first nails are driven. Is this addition necessary? Is it the best alternative or are there others? How will it affect the traffic flow? What do we want to achieve with this addition? What materials should be used? What is the budget? Thorough planning prior to construction usually enhances the likelihood of achieving our objectives within the desired timeframe and budget.

This same concept applies to meetings. To enhance the effectiveness of meetings, it is important, as Covey suggests, to "begin with the end in mind." This is done by understanding the purpose of your meeting and the outcomes you hope to achieve. Rather than assuming a meeting is necessary, ask yourself why you are meeting, who really needs to be involved, and what you hope to accomplish. You may find a more effective way of achieving your objectives. It is not at all uncommon for people to emerge from a meeting wondering, "What was that all about?" or "Why did we have to meet?"

Just as you would do in building an addition to your home, it is important to put your ideas and your plans in writing. In so doing, you are developing a blueprint that will help guide your meeting and keep it on track. In any plan, the more detailed it is and the more you anticipate, the less you leave to chance. The importance of the meeting and its desired outcomes should serve to guide the amount of time you spend in planning.

Obviously, the more important the meeting is, the more detailed your plan should be. Many tools exist that can help guide this planning process. One aid that I find effective is called a "meeting planner," which outlines five important areas to consider:

The first category is “specific results to be achieved.” In this section, you consider outcomes. “By the time we leave the meeting, we should have done the following in this order of priority.”

Next is “to achieve these results, I will need these resources.” This focuses on the people, information and materials needed to achieve desired outcomes. In many cases, some of these people will have to be involved with you in the planning phase.

The third category is “facilities, equipment, special arrangements.” Here you consider physical elements of the meeting like location, audio visual equipment, sound equipment, date, start time, end time, costs, refreshments, etc. Likewise, you should consider who will be responsible for attending to these details.

Next is “the agenda.” Once you have completed the first three steps, building the agenda should follow. The information you already have assembled will guide the development of your agenda. Typically, the most important items on an agenda should come first chronologically, as they usually will receive the most attention. As meetings wane, participants often become anxious to move through the agenda quickly and tend to process information and decisions more rapidly, but not necessarily more effectively. Also, before an agenda item is added, it should be reviewed to determine:

- how it contributes to achieving one or more of the desired outcomes;
- whether or not it really needs to be a part of this particular meeting.

Again, keeping meetings focused on important issues is crucial. Too many agenda items dilute the purpose of the meeting and its effectiveness.

Finally, there is the evaluation stage. Somewhere in the planning, consider how to evaluate the effectiveness of your meeting, analyzing what went well and what problems and/or solutions emerged.

Since a record of the events is important, appoint someone to take minutes. Once the plan and agenda are complete, you might consider validating them through a preliminary review of both items with key meeting participants. This process helps to avoid blind spots or potential rifts that might emerge during the meeting. The method also uses feedback to make appropriate adjustments prior to the meeting and builds ownership for the meeting among those participants.

The last step in the planning phase is the pre-meeting communication. All participants should know clearly when and where the meeting will occur. Participants should receive an agenda and as much advance information as possible. This is particularly important if action will be required. Having the information in advance will allow time for study and should result in more informed decisions.

If maximum participation is crucial, it is important to coordinate schedules for the best meeting date and time. Also, the agenda should have start and finish times so participants can plan their schedules. Furthermore, include a self-addressed, stamped RSVP card with meeting notices, so you know exactly who will be in attendance.

## **Execution**

Once the planning phase is complete and the meeting day arrives, several steps lead to the successful execution of the meeting. An essential for effective meetings is good communication. According to Max DePree in “Leadership is an Art,” good communication involves more than sending and receiving information, more than the mechanical exchange of data. “The best communication forces people to listen and

conveys respect,” says DePree.

How do you achieve this? Recently, I had the good fortune to spend some time with several chief executive officers and senior officers of corporations. One of the major topics of discussion was – “Good communication: What is it? How do we improve it?” Their answers can serve as a guide for accommodating effective communication in all meetings. According to these corporate leaders, good communication:

- a. Is responsive to needs of others. If not, why should they pay attention?
- b. Knows and understands the audience and conveys respect.
- c. Is clear and concise.
- d. Uses simple language and avoids jargon.
- e. Uses all of our senses.
- f. Is well-prepared, rational and truthful.
- g. Listens with senders' perspective in mind and sends with listeners' perspective in mind.
- h. Tests for reception.
- i. Asks questions.
- j. Uses many forms.

Meetings have many purposes and people in meetings have many motives. According to March and Olson in “Ambiguity and Choice in Organizations”: “Meetings serve as garbage cans into which problems are dumped.

“Meetings serve as garbage cans into which problems are dumped. At any moment in an organization, there are participants looking for places to expend time and energy, problems looking for solutions, and solutions looking for problems. A scheduled meeting attracts all these, and the outcomes depend on a complicated interplay among the inputs that happen to arrive. Who came? What problems, concerns or needs did participants bring? What solutions were brought?”

Understanding these dynamics and accommodating them are essential to effective communication. Though a balance must be drawn between allowing for good communication and completing the agenda in a timely fashion, not being too compulsive about harnessing conversations that may drift slightly is crucial. Though it's not on the agenda, effecting "good communication" may mean allowing for participants to address their problems and offer their solutions.

Recognize that adults learn and are motivated differently than children. As early as the 1920s, through the Hawthorne studies, we learned that when adults get a chance to have input, it increases their motivation to be involved. Adults have a need to feel that their ideas and experiences are important to the group. In fact, through years of working with adults and observing how they learn, Malcolm Knowles developed a theory of adult learning called "androgogy," which suggests:

- a. Materials and information adults receive should have immediate rather than postponed application in solving problems.
- b. Adults accumulate a reservoir of experience that is a rich resource.
- c. Adults have a problem-centered rather than a subject-centered orientation.

Thus, their readiness to be involved in activities or meetings will be oriented towards tasks and problems they can solve, not subjects.

In conducting a meeting, consider applying the lessons of both the Hawthorne studies and Knowles' work. Rather than seeking simply to transmit information to your

audience, try to orient the presentation toward solving one or more of their problems. For example, instead of presenting only financial information regarding a proposed purchase of major equipment, include in that presentation a discussion of how it will solve problems or address concerns of the people attending the meeting. Additionally, if having input increases the motivation of adults to be involved, then structure appropriate ways in the meeting to secure their input. Consider one or a combination of these methods:

- question-and-answer session
- discussion group following a formal presentation
- problem solving group activity
- brainstorming session
- case study
- debate
- hands-on activity
- demonstration
- slide show or video
- simulation

The concept here is to make the meeting and the results come alive by maximizing involvement of participants. Try to keep the meeting and agenda on track by starting and ending on time. If a meeting starts 10 to 15 minutes late and then extends 10 to 15 minutes, you already have kept them 20 to 30 minutes longer than you said you would. Another thing to consider is that each person within the group has a preferred learning style that may vary from others in the group.

For example, one person may be visually oriented, therefore using overheads, slides, charts or video – all of which appeal to visual learners – is helpful. Others may be auditory learners, who respond better to words and conversations. Thus, what you say and the way you say it should be measured. Still others are more sensory, therefore presentations that appeal to their senses and emotions are more effective. When possible, try to determine the preferred learning orientation of your audience and don't be afraid to use various methods.

### **Evaluation and Follow-up**

The best meeting of the year can be rendered ineffective by neglecting appropriate evaluation and follow-up. Evaluation can be formal or informal, consisting of a standardized evaluation form or informal phone calls or conversations to get feedback on the effectiveness of the meeting. Also, a good place to begin the follow-up process is with the minutes.

First, it is important to review the minutes to make sure they represent an accurate reflection of the meeting deliberations. If a question surfaces regarding something someone said or a point they made, don't be afraid to ask them to clarify in a follow-up phone call.

Second, it is important to note action items and identify in the minutes exactly who is responsible for what action. Generally, when we send out minutes to individual participants, we highlight action items for which they are responsible or that may directly involve them.

Finally, if appropriate, we put in a tickler file a date to call and check on progress.

These represent a few ideas that can help improve meeting effectiveness. The important concepts here are to think about the meeting, plan its content, accommodate good communication and varying needs of participants, and follow up quickly and deliberately. In so doing, you can be sure that you will not only note improvement in the effectiveness of your meetings, but you will also enhance your professional credibility.

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