

BUSINESS BEST PRACTICES

A Meeting of the Minds: The Art of Planning Productive Meetings

We have many ways to communicate effectively in today's world—emails, text messages, faxes, phone calls, and last but not least, face-to-face interactions. We often get in a rush to distribute information or get the ball rolling quickly via instant electronic communications and we overlook the advantages of a group “meeting of the minds.” Electronic communication is viable and useful for many business situations. However, when issues are sensitive, complex, or critically important, multiple disjointed communications can create confusion and discord. These problems can often be avoided with a group meeting.

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Meetings, whether live or virtual, can be extremely productive or huge time traps. Meetings are “expensive” because they take people away from their work. Yet when meetings are planned and executed effectively, the benefits far outweigh the costs.

Meetings With a Mission

Contrary to popular opinion, meetings are not inherently boring and unproductive. Meetings can and should be opportunities for people to have lively, synergistic discussions about topics relevant to their livelihoods. Karen Leland and Keith Bailey, authors of the book *Time Management In An Instant*, tell us that every meeting needs a “PAL”—Purpose, Agenda, and Limits. The PAL system is simple and straightforward. It creates a basic mindfulness towards meetings that is appreciated by all participants.

The Purpose

All meetings should serve a purpose. Each meeting should have a defined mission or overall objective.

Ask yourself the following questions before you plan any meeting. What is the desired outcome? Are you communicating information to the group, or are you asking them for information or project status? Do you want to solicit ideas and suggestions? Are there decisions that need to be made during the meeting? Is the meeting strategic or tactical? After pondering these questions, you should be able to clearly articulate the purpose and the desired outcome, which will guide you in planning the meeting.

The Agenda

Time is a precious resource. Agendas help streamline meetings and avoid wasting time. Be sure to include the purpose and what you hope to accomplish at the top of your agenda. You may want to consider preparing a draft agenda and running it by attendees prior to finalizing it in order to solicit input and/or additional agenda items. When preparing an agenda, consider the following:

- *Topics*—What topics should be covered to meet the objective? What are the priorities?
- *Outcome*—What do we want to accomplish during the meeting?
- *Order*—What is the most logical order to discuss the topics?
- *Timing*—How much time should be allotted to each topic? Total meeting time?
- *Attendees*—Who should attend to ensure a successful meeting?
- *Time and location*—When and where will the meeting take place?

- *Format*—What is the best format for this type of meeting?
- *Preparation*—Is there any information attendees need to know beforehand or any “pre-meeting work” that the attendees should do?

Although you may have attended a lot of meetings where they quickly “knocked out” the less important agenda items first, it is usually more productive to place the topics on the agenda in order of importance, with the most important items first. That way, you make sure that sufficient time is dedicated to the important topics and the group is less inclined to devote too much time on the more trivial issues.

The Limits

Every meeting should have a stated start and finish time, and a meeting should always start and end on time. Period! When a meeting starts late, the on-time attendees’ time is wasted. When a meeting runs over, it usually becomes unproductive and attendees’ schedules are adversely affected.

Keeping Meetings on Track

Even though most meetings are informal, it is still important to have structure and order to ensure productivity. Effective meetings are well-planned and well-executed. The first step to keeping meetings on track is to start on time. Do not backtrack for late-comers; let them find out what they missed on their own time. If you cater to them by recapping what has happened so far, there will be no incentive for them to arrive on time in the future.

Use the agenda as a guide for the amount of time to be spent on each topic. If you start to run out of time on a specific topic, try to close off conversation and bring it to a conclusion. If more time is needed, then consider deferring the discussion to a subsequent meeting or assigning it to a task force to deliberate and report back at the next meeting. If, instead, you choose to continue the discussion, then you may need to defer another item on the agenda to a later date to keep the meeting from running late.

Here are a few additional best practices to keep a meeting on track:

- Assign a note-taker for each meeting. After each topic is discussed, quickly summarize with the group and get consensus. Include this summary in the notes, as well as any next steps identified.
- As tasks that need to be completed are identified, note who is to do them and the relevant deadlines. Build time as needed into future agendas for reporting and status updates on assigned tasks.
- Note any items that need further discussion or additional action.
- If someone gets off on a tangent and brings up a “worthy” topic that is not on the agenda, note it for the “parking lot.” The “parking lot” is a means of tracking items for future discussion until they are assigned to a future agenda.
- If someone is dominating the conversation, proactively solicit input from other attendees. You also can remind attendees of the time limit allocated to the topic and ask them to keep their comments brief and to the point.
- If you consistently have the same people dominating meetings or showing lack of respect to other attendees, it may be necessary to establish some ground rules for meeting interaction.
- Once the meeting is over, finalize the notes and distribute to all attendees and stakeholders.

Well-run meetings keep employees engaged and make them feel that their time and input is valued.

Match the Meeting Format to the Purpose

All meetings are not created equal. Meeting formats, frequency, and amount of time spent can be tailored to meet specific needs. When planning a meeting, take time to think about the best format to fit your needs. The list below identifies a few of the most popular types of meetings, all of which require planning and agendas to be effective:

- *The “stand-up” team meeting.* Daily or frequent brief get-together (10 to 15 minutes) to communicate quickly or give status updates. Usually held early in the day. Not for decision-making!
- *The periodic staff meeting.* Held on a regular basis (ideally same time/day each period and lasts no longer than one hour). This is a popular format for team or department meetings.
- *Task force meeting.* Established as needed; attendees are an ad hoc group assembled to deliberate an issue and report the findings and/or solutions to a larger group.
- *Brainstorming or cross-department meeting.* Held as needed to review opportunities/threats or operational issues, or to deliberate strategic initiatives; can be one large group or multiple small groups,

with representation from various departments or employee segments.

- *Management meetings.* Gathering of leaders and senior managers to discuss strategic direction, operational issues, company policies, and financials.
- *Company or “town hall” meeting.* Gathering of all personnel; recommended quarterly to inform employees of strategic direction, goals and initiatives, financial positions, and other significant information impacting the company. Often held at each location for larger companies.
- *Offsite workshop or company retreat.* Offsite gathering of all employees; great opportunity for team building. Usually involves long-term planning, brainstorming, or some type of activity in which all attendees can participate.
- *Virtual meetings.* Teleconference or Skype-type meetings to bring together remote workers and/or people across various locations.

There are extra considerations when conducting teleconferences. Ideally, limit time to 30 minutes and limit the number of attendees to ensure participation and make the best use of everyone’s time. Remind people to give their full attention and not to multi-task during the call. Also, ask them to mute their phones if there is extraneous noise at their location, and then they can unmute when they wish to speak. Define the structure at the beginning of the call so attendees understand if there will be individual speakers or if it is to be an open discussion. If all members in the group are not familiar with each other, make brief introductions at the beginning of the call. It is also a good practice to ask people to state their names before making comments so the attendees will know who is speaking. Finally, make sure everyone understands in advance how to sign on to the call and who to contact if they have technical difficulties.

Understanding the Roles: Leader vs. Facilitator

When a meeting covers general ongoing work and project status, an officer, senior manager, or supervisor usually acts as meeting leader and keeps the agenda flowing and the timing on track. The leader participates in the discussions and often leads the discussions and/or disseminates information. Sometimes a leader assigns someone in the group with the task of watching the clock, and that person will prompt the leader when time is getting short for a specific topic on the agenda. The leader may also assign other attendees

to lead the discussions for specific topics. It is the leader’s role to encourage participation and listen to comments and ideas. It is also the leader’s responsibility to maintain order in the meeting and ensure that attendees are treating others in a courteous and respectful manner.

Sometimes leading meetings is a new role for managers. Many managers get thrown into this role with little or no guidance or training. If you find yourself in this situation, think about past meetings you attended. Note what worked well in the good ones, and what was wrong with the less productive ones. Do the same thing the next time you attend a meeting that someone else is leading. It is always easier to see the shortcomings in what others do than in what we do ourselves. Watch for successful techniques that you could adopt in your own meetings. You can significantly improve your skills by recognizing the elements of a well-run meeting and identifying the causes of poorly run meetings. Get in the habit of preparing questions in advance to stimulate discussion. It is also helpful to increase your awareness of what management behaviors employees dislike the most. In the book, *Becoming a Successful Manager*, by Jack Grossman and Robert Parkinson, the authors refer to a survey that was conducted with employees asking about the biggest mistakes managers make. Many of these mistakes are made while conducting meetings. The common responses included:

- Assumes he or she knows what the problem is;
- Assumes employees are as enthusiastic as he or she is;
- Has all the answers;
- Does not know what else is going on in employees’ lives;
- Frequently does not know what the real problems are;
- Talks too much and frequently does not listen;
- Does not seem to care what employees think or feel;
- Does not encourage feedback;
- Corrects more than praises.

Developing a good working relationship with the employees in your group and learning to avoid the pitfalls identified above will get you well on your way to leading productive meetings. It also is good practice to occasionally allow employees to critique a meeting and give suggestions as to how to make future meetings more productive.

When a meeting's purpose is to brainstorm, problem-solve, or solicit innovative ideas, a facilitator is needed to run the meeting. The facilitator does not actively participate in the discussions, but he or she defines ground rules for the discussions, maintains an orderly process, and keeps the discussions moving forward. Companies often hire a consultant to facilitate these types of meetings, because when an officer or manager facilitates, the group dynamics can be affected. People may be afraid to speak up or are more guarded in what they say. Also, when an officer or manager is facilitating, it is often difficult for that person to resist adding commentary or possibly even becoming defensive if company policies or sensitive issues are being discussed. It is the facilitator's job to create an atmosphere where people feel safe to share their thoughts and ideas. The facilitator gathers all the ideas at the end of the meeting and informs the group of what the next steps are and how the information will be used. The facilitator also should reaffirm the

value of the meeting and show appreciation for the time invested. Once the meeting is over, the facilitator then debriefs one or more "leaders," who will take the information and decide how it will be utilized or acted upon.

Conclusion

Productive meetings are a great way to exchange information, coordinate activities, solve problems, generate ideas, and make important decisions. If you use meeting time wisely, foster healthy communication among attendees, and ensure that the meeting's purpose was fulfilled, attendees will leave energized and with a real sense of accomplishment. As Aristotle told us, "The whole is greater than the sum of its parts." When a meeting is successful, great things happen. We reap the benefits of a productive "meeting of the minds," and together we are able to accomplish much more than any of us could accomplish on our own. ■