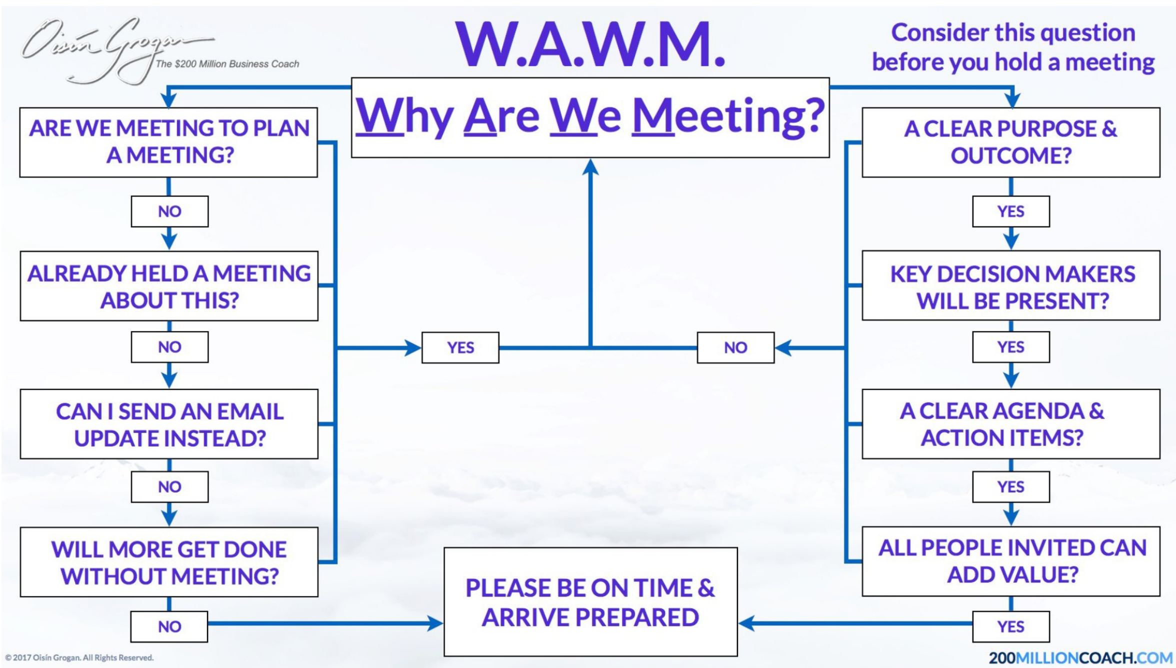
# Managing Meetings

*Old Taskmaster*[1] believes "meetings should be **cut in half**, screens should be **completely banned during meetings** – especially the screens of anyone playing Solitaire – and there are always **more productive things to do** than hold a meeting. Good meetings are like life in Thomas Hobbes' *Leviathan*: **Nasty, brutish and short**.[2]" We tend to concur!

## Overview

Unfortunately, meetings are a key part of all projects and central to effective communication[3]. To make the necessary meetings effective, careful thought has to be given to the choice agenda, attendees and the specific purpose of each meeting. Most meetings burn several thousand dollars per hour whilst in progress[4] – this investment can be useful, or wasted! The responsibility of anyone calling a meeting or attending a meeting is to make sure its full value is realised. Unfortunately far too many organisations seem to have meetings with no real purpose other than to have the 'Tuesday afternoon' meeting on Tuesday Afternoon to make someone feel important because they can attend the meeting. Before calling any meeting work through Oisín Grogan's W.A.W.M. questionnaire below!




Some of the best meetings are the ones you don't have: see on-line collaboration tools below.

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1 Quoted in https://www.startupsmart.com.au/leadership/its-time-to-rally-the-troops 29/10/12

2 Hobbes, Thomas. *Leviathan*. Oxford at the Clarendon Press. 1651. English philosopher: *"[In a state of war] No arts; no letters; no society; and which is worst of all, continual fear and danger of violent death; and the life of man, solitary, poor, nasty, brutish, and short".*

3 A number of posts focusing on communication have been published on the Mosaicprojects's Blog. To view the summary see: https://mosaicprojects.wordpress.com/category/stakeholder-management/communication/

4 The cost of a meeting includes the facility costs, the loaded hourly cost of each of the attendees plus the opportunity costs associated with the value of other potentially valuable work not done by the people whilst they attend the meeting.

If a meeting passes the W.A.W.M. test, good meetings are:

- Planned – know exactly what you want from the meeting and how this will be achieved
- Prepared – data should be collected and processed prior to the meeting and distributed with the agenda
- Short – 30 minutes is a good maximum for any meeting
- Opened and closed carefully – people remember these elements most
- Controlled – work through the planned agenda, contentious issues are 'parked and move on'
- Fine tuned to respect the culture of the group – a face-to-face meeting with your local team/group or an international teleconference will require some differences in approach
- Action oriented; and
- Run on time[5]!

You don't need to sit down; for less formal meetings or chats suggest a walking meeting, in other circumstances a 'stand up' meeting[6] at the location of the issue being discussed may eliminate a lot of wasted time!

Interviews are mini meetings; all of the points below apply. In addition, you need to prepare thoroughly, ensure there is no bias and always have a second person in attendance. Never interview alone! Remember to be thorough in preparation and follow-up, and document and distribute any agreements or outcomes

## Key meeting rules

Key meeting rules include:

- The value created by the meeting should exceed the total cost of the meeting.
- Have a purpose for each meeting – one meeting, one purpose! Do not mix multiple purposes into one event. Typical purposes may include:
  - **Information exchange**, including briefings and updates. Some specific purposes include:
    - Ensuring a common understanding of an issue or problem.
    - Seeking feedback, agreement or actions on previously disseminated information – informational items should be handled outside of meetings through information distribution channels. However, commitment as a group is needed to do the pre-work and to ask any informational questions off-line.
    - Building or maintaining rapport, commitment and moral, particularly if the team's objective is difficult to achieve.
  - **Solving a problem[7] / idea generation[8]** (small group – often helped by using a facilitator[9]), may involve brainstorming, option evaluation, nominal group techniques, solution design, etc.
  - **Making a decision[10]**.

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5 In most Western cultures 'on time' is a virtue but different people and different cultures have quite different perspectives on time see: https://www.mosaicprojects.com.au/Mag_Articles/SA1021_Perspectives_on_time.pdf

6 Stand up meetings have a long tradition, meetings of the Privy Council, a formal body of advisers to the sovereign of the United Kingdom have been held standing ever since the day in 1861 when Queen Victoria discovered it helped get them over with sooner. They are also a part of the Agile approach to managing projects, see more on Agile: http://www.mosaicprojects.com.au/PDF_Papers/P109_Thoughts_on_Agile.pdf.

7 For more on ***problem solving*** see: https://www.mosaicprojects.com.au/WhitePapers/WP1013_Problem_Solving.pdf

8 For more on ***idea generation*** see: https://www.mosaicprojects.com.au/WhitePapers/WP1068_Data_Gathering.pdf

9 For more on ***facilitation*** see: https://www.mosaicprojects.com.au/WhitePapers/WP1067_Facilitation.pdf

10 For more on ***decision making*** see: https://www.mosaicprojects.com.au/WhitePapers/WP1053_Decision_Making.pdf

- **Social interaction**. Team building, promoting the role of an individual (eg, a new team leader) and creating some face-to-face time for virtual teams can be valid purposes for a meeting. You do need to meet with the team regularly but not too often – these meetings usually incorporate an update or other information exchange.

- Ensure the attendees are all there to contribute value. If you can't work out how to make the meeting relevant to everyone attending, individual catch ups are a better solution; the challenge with short one-on-one meetings is making sure everyone else is kept informed which requires open and effective communication (see online collaboration tools below).
- Schedule recurring meetings in advance. However, make sure the meeting has a defined value proposition, the majority of time wasted in meetings is wasted in recurring meeting that have no purpose.
- Gather all of the data needed for the meeting beforehand, process it and distribute with the agenda. Use the knowledge gained to set / fine-tune the agenda (see bullet point below).
- Set an agenda and time limits and keep to them. If an item overruns the few people involved need to take the issue off-line or to a separate meeting.
- Distribute agendas, papers, reports and other documents to everyone before the meeting is due to take place. If possible, give the attendees a chance to comment on the topics up for discussion and to request the inclusion of additional things they would like to talk about during the meeting. If possible, check key contributors have gathered their facts/information and prepared their updates.
- Collaboration tools can be helpful. They ensure that everyone has the agenda and other information before the meeting, and they can help you record actions so that everyone can see the output. In addition, features like instant messaging, chat and discussions allow you to hold your meeting virtually, regardless of where individuals are actually based (see dedicated section below).
- Let people know their responsibilities and time limits in advance: "Fred will present on xxx for 5 minutes and then there will be 10 minutes discussion"
- Bring the right people together, ensuring only those who can contribute are invited and all key contributors attend. This means making sure everyone knows about the meeting well ahead of time. Put it in their diary or on a shared project calendar as far in advance as is practical (don't just email the agenda and hope it has been seen).
- Unless the meeting is a technical meeting called to solve a specific problem (typically with a very limited number of experts present), any problems that need analysis should be moved off line for solution later (and the people tasked with developing the solution should be 'actioned' in the action list).
- Most disputes and conflicts should similarly be moved off line unless the issue in dispute involves the majority of the people present in the meeting[11].
- Chair and lead the meeting based on the set of rules already distributed to the attendees. Some key items to consider include:
    - Punctuality and time keeping – start and finish on time[12]!
    - Attendance and effect of non-attendance (eg, no option to re-open agreed items)
    - Dress standards (or non-standards – casual is OK for most working meetings)
    - Conduct and politeness
    - Food, drink, rest breaks, and other facilities management items
    - Ban the use of screens – smart phones and computers – no one is too busy or too important to give their full attention for the duration of a properly structured meeting, if they feel they are too busy or too important, **don't come!** (*for effective note taking see the next section*

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11 For more on ***conflict resolution*** see: https://www.mosaicprojects.com.au/WhitePapers/WP1041_Managing_Conflict.pdf

12 But be aware of ***cultural differences in respect to 'time'*** see: https://www.mosaicprojects.com.au/Mag_Articles/SA1021_Perspectives_on_time.pdf

*below*). If you are using on-line document storage have one display projected for everyone to see.

- Allow everyone to participate. Don't allow one or two people dominate the discussion. Ideally, you want to hear from everyone, and everyone should have the same opportunity to raise issues. One way to make sure that everyone gets a turn to speak is to use a timer.
- Avoiding bias[13] and personalities when confronting issues. Some of the challenges include:
  - ***Ad hominem***: in Latin, it means *'argument against the man'*. Another person may attack the person who proposed an idea in order to discredit the merit of the idea. Keep the discussion focused on facts not personalities.
  - ***Frozen evaluation***: "We tried it five years ago and it did not work!" Unless all of the underlying factors five years ago were exactly the same as they are today, it is worthwhile revisiting the previous options (the *Semmelweis reflex*).
  - ***Personal perspective***: "I personally don't like that option; therefore, we should not pursue it" (*Confirmation bias*). Incorporate the group's perspectives in addition to your own before making the final decision.
- Options to raise issues not on the agenda (usually limited), plus how to have items included on the agenda.
- How decisions will be made, by the PM, by consensus or by a majority vote[14].
- Responsibility for action items and reporting back.
- Note: ***'Rules are for the guidance of wise people and the blind obedience of fools'*** your meeting rules should to help the efficient running of the meeting not restrict the application of common sense to create better outcomes.

- Do not use meetings to gather information from individuals (eg, progress reports), meetings are valuable to discuss and appreciate the results of information previously gathered and analysed:
  - Data gathering is a 1:1 process and should occur prior to the meeting, if there are 10 people in a meeting that is being used to gather information, 8 are wasting their time.
  - Data (eg, progress reports) is not information, the data needs to be gathered, validated, processes and assessed before it becomes useful information. For example, cost and schedule progress should be acquired, checked and the schedule and cost reports updated before the meeting.
  - The 'consequences' should be itemised for discussion in the agenda.
  - And then the full set of information distributed to allow attendees' adequate time for their assessment before the meeting is scheduled, so they can contribute to discussions on the implications of the information and help determine appropriate responses/actions.
- Agree actions. Assign deliverables and time limits for all tasks that result from the meeting. Follow up to ensure the assigned actions have been accomplished[15]. To support this, the first item on the agenda at regular meetings should be 'Actions from the previous meeting' (but don't wait until the next meeting to follow up…..).
- Document and publish meeting minutes or notes:
  - Action items should be distributed **within a few minutes** of the meeting concluding.
  - Minutes and/or meeting notes within 24 hrs (see below for contemporaneously agreed notes).
  - Do you really need minutes? Expand the 'action items' to **RAID**, Risks, Actions, Issues, Decisions and distribute as soon as the meeting finishes and you may have all of the records you need to manage effectively.

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13 For more on the effects of ***innate bias*** see: https://www.mosaicprojects.com.au/WhitePapers/WP1069_Bias.pdf

14 For more on ***decision making*** see: https://www.mosaicprojects.com.au/WhitePapers/WP1053_Decision_Making.pdf

15 For more on ***delegating actions*** see: https://www.mosaicprojects.com.au/WhitePapers/WP1091_Delegation.pdf

## An effective technique for documenting meetings

All meetings benefit from agreed understandings and records. If these can be created and agreed contemporaneously you can save yourself and your colleagues time and effort and to take a major step forward in productivity. To achieve this objective:

- Make sure your meeting room has a projector or large screen TV that everyone can see easily. Make it the focus of the room.
- Nominate one person to take notes for everyone during the meeting. Plug their laptop computer / iPad into the projector so that everyone can see the notes as they are typing as you go along. Meeting notes shouldn't be a word for word rendition of what was said or an audio recording of the meeting. They should be a summary of the things that were said and importantly include a record of the reasons for decisions, a record of what was considered and a note of the data that was or wasn't available to make the decision.
- Nobody else should take notes or minutes - that should be a strict rule to ensure everyone concentrates on the meeting rather than trying to write things down. Anything they want noted they should ask to be entered into the notes for everyone.
- The output of the meeting is the set of agreed notes that were projected on the wall. Therefore, the minutes are agreed as the meeting progresses.

The advantages of this approach to managing meetings include:

- There is only one set of notes that have been agreed so there is no room for misunderstanding. Nobody needs to read the notes after the meeting - they have already read and agreed them. The notes are distributed as a reference.
- The meeting is much more collaborative because everyone is working to get a set of agreed notes. They work together to ensure that the items on the agenda are properly noted, that all points of view are written down and reasons for decisions recorded. If there is disagreement all points of view should be written down. This makes everyone feel their point of view is important and has been listened to.
- The notes/minutes can be sent around immediately the meeting finishes and will be in the participants' email inboxes before they get back to their desks. There is no more waiting for someone to write up and distribute the notes.
- Agreed actions are in the document that gets distributed so everybody is clear on what needs to be done and can get on with the agreed actions!

## Action Items

An action item is something that requires follow-up work and is delegated[16] to a specific person for 'action'. By their nature, action items normally cannot be planned for in advance. They arise on an ad-hoc basis during meetings (or other activities) and an action is assigned because there is not enough knowledge, expertise or time to resolve the item at the time it originally surfaced. Action items need to be assigned, worked on later and completed. Examples of action items include forwarding information to someone, arranging a meeting, or providing a quick estimate on a piece of work. In many cases, action items are trivial in nature, but in other cases they can require substantial work to complete.

Action items that are trivial (less than a few hours work) and scheduled to be completed by the next meeting should be recorded in a section of your meeting minutes reserved for 'action items' – including any actions that arise outside of the actual meeting. Then at the start each meeting these items should be reviewed to validate that they are completed and then cross them off the list.

[16] For more on ***delegation*** see: https://www.mosaicprojects.com.au/WhitePapers/WP1091_Delegation.pdf

More substantial items should be documented as activities in the project schedule – the 'action item' becomes adding the work to the schedule before the next meeting. Within the schedule, a resource and end-date are assigned and the activity is then managed and tracked as any other activity in the schedule. In general, this is the better approach because it keeps all of the significant work items in one place and allows the project manager to enforce the discipline of *'if it's not on the schedule, it will not be worked on'*. This approach also allows the project manager to see the impact of the action items on the schedule.

Action items should not be confused with issues. An issue is an identified problem which will have a detrimental impact on the project if left unresolved and by definition the solution is not known until the issue is resolved; whereas action items simply require someone to take the appropriate action. An action item may lead to the discovery of an issue which is managed through the Issues log[17] or a risk to be incorporated and managed through the Risk register[18], but the action item itself is the investigative work, not the potential outcome.

## Kickoff Meetings

The purpose of the kickoff meeting is to formally notify all stakeholders that the project has begun and make sure everyone has a common understanding of the project and their role. The 'meeting rules' outlined above still apply – you only get one chance to make a good first impression; but there are a number of specific things you want to cover at this meeting:

- Introduce the people at the meeting.
- Recap the information in the Project Charter[19], including the purpose of the project, scope, major deliverables, risks, assumptions, etc.
- Discuss the important roles and responsibilities of the project team, clients and stakeholders. If there is confusion about the role of any person or organization, it should be discussed and clarified now.
- Go over the general approach and schedule of the project. This gives people a sense for how the project will unfold. In particular, you will want to ensure that people understand what they need to be doing in the short-term to support the project.
- Answer any outstanding questions. The purpose of the discussion is not to rehash the purpose of the project, but to allow people to voice specific questions or concerns they have as the project begins.
- Confirm that the project is now underway. If the project has not started yet, it should now be ready to start immediately.

Timing is a key issue – in many projects the majority of the team are not available until the start of the 'execution' phase, and the purpose of the meeting is to literally 'sell the plan' to the people who will be doing the work. In general, the project team, sponsor and major stakeholders should be in attendance. If this results in too many people for comfort, you can consider having only the major players attend. You can then meet with others in subsequent mini-kickoff meetings or you can send the relevant meeting information to the people who could not attend.

## On-line collaboration tools

In the past many meetings were needed simply to exchange information and gather feedback – the effective use of on-line collaboration tools can almost completely remove the need for this type of meeting (by being a

17 For more on ***managing issues*** see: https://www.mosaicprojects.com.au/WhitePapers/WP1089_Issues_Management.pdf

18 For more on ***managing risks*** see: https://www.mosaicprojects.com.au/WhitePapers/WP1047_Risk_Management.pdf

19 For more on the ***Project Charter*** see: https://www.mosaicprojects.com.au/WhitePapers/WP1019_Charter.pdf

continuous exchange of information). However, care needs to be exercised to ensure the on-line system does not become an 'all consuming' entity – effective time management is needed[20].

The benefits of this type of collaboration have been conclusively proved in the construction industry[21], and the tools are readily available so all you need now is to start making use of this capability. A few tips to help include:

**Keep all your discussions online**: One of the most effective ways of working is to move everything online so there is only one version of the truth. Online collaboration software is designed to do this, as it is designed for running projects on the web. The benefit of having all your project information and discussions online is that everyone can see the latest status at any time. You can even move your emails online into the software that you are using so that the whole discussion trail is in one place.

**Use instant messaging**: Instant messaging is a helpful way to see if someone is online and therefore able to take a quick question; it is great for getting the answer to a quick question, or checking if one of your colleagues is available for a longer discussion. People in meetings can use it to get a quick response to something if they don't know the answer. You can archive your messaging trail securely online so that if you need to refer to it later it's there in your project files. It's faster and easier than email and can help move the discussion on.

**Share pictures**: Do you know what all your team members look like? That might sound like a silly question, but if you are working with colleagues overseas or even in a different office, you may never have met them. Even if you have met them, chances are someone on your team has only ever talked to them on the phone. Upload photos to your team area so that you can see each other. It's easier to collaborate if you can put a face to a name!

**Upload files**: Stop sending huge email attachments by uploading all your core project files to a central online location. Using a document repository like this means that everyone always has access to the latest version, which can be a massive time-saver. It also means that people don't get frustrated looking for the latest copy and your IT department will be very happy that you aren't using your inbox as a document store!

**Share calendars**: It can be difficult to collaborate with team members if you don't know where they are. Sharing calendars means you can check if they are on leave or out of the office, and schedule meetings appropriately. You can also put key project milestones in the calendar so that everyone knows what is coming up without having to look at the project schedule. Make sure that you keep your own calendar up-to-date as well and include all the national holidays that are appropriate for your international team members, so you know when their offices are likely to be closed.

**Balance Push -v- Pull communication**: The material on-line is available to be 'pulled down' by an interested person. If you want someone to know the information is there or that they need to access it you need to push out a message letting them know (and follow up to see that it has been received and acted upon). Keep the 'push' to a minimum for the greatest effect.

## Conclusion

Meetings are a 'necessary evil' in most projects and organisations; the ideas outline in this White Paper should help to make your meetings more effective and valuable to the project and the organisation.

[20] For more on ***effective personal time management*** see: https://www.mosaicprojects.com.au/WhitePapers/WP1054_Personal_Time_Management.pdf

[21] For more on ***BIM*** see: https://www.mosaicprojects.com.au/WhitePapers/WP1082_BIM_Levels.pdf

The only people likely to object to the implementation of these ideas are the professional 'meeting attendees' who justify their existence in an organisation by the number of meetings attended rather than the value contributed. One way to overcome this resistance is to calculate the estimated cost of the meeting on a pre-minute basis at the start: *"There are 12 people present with a loaded cost rate of around $150 per hour each, therefore the cost of this meeting is $1,800 per hour or $30 per minute, plus the value of the lost work everyone is not doing whist we are here…… - let's make effective use of this investment"*

An alternative is to simply cancel all (or most) of the 'routine' meeting scheduled around your project and only call meetings that can be justified on a sensible cost/benefit analysis.

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