Miraculous Meetings—

Creating Results You Want

by Marta Wilson, PhD and Cynthia Schilling

Over the years, we've been in a lot of meetings. Hundreds of meetings...dare we say thousands? We've facilitated, we've participated, we've observed, we've chaired, we've recorded…you name it. We've led meetings to drive and create organizational reorganizations, strategic planning, balanced scorecard development, systems mapping. The list is long. Some of these meetings were great; some were good; some were bad; and some were just plain ugly. Today, we realize every one of those gatherings could have been a success if a few rules of thumb had been applied consistently. Our goal is to make every meeting we touch a triumph. Our evidence supports that we can be the source of energy in every meeting we attend, regardless of the role we play. We believe this holds true for all individuals.

One role from which most meetings can benefit is that of an experienced facilitator. A facilitator is someone who helps groups work together before, during, and after meetings to make decisions, develop plans, and implement actions that lead to desired results.

Regardless of the purpose of the meeting, two rules of thumb hold true. A good facilitator must simultaneously manage time, energy and results. These are three balls that must be juggled simultaneously. In our opinion, the most important, yet most often overlooked ball is energy.

We'll talk more about energy management and some of the simple yet invaluable steps facilitators, leaders, and meeting participants can take before, during, and after all meetings to promote success. These steps ensure that everyone attending a meeting walks away from it thinking, "That experience was definitely worthwhile and a good use of my time."

The following guidelines are drawn from our personal experience as well as the resources on page 7 of this article.

On Your Mark, Get Set

Have you ever been to a meeting and thought, "Is this necessary? Why am I here?" Our lesson learned is to always make sure a meeting is the appropriate response to what we are trying to achieve. There are other alternatives, such as using e-mail, making phone calls, conducting one-on-one discussions, or having brief stand-up meetings. Here is what the experts say about when to meet and when not to meet.

When Not to Meet

- ❒ The subject is trivial
- ❒ The leader's mind is made up
- ❒ Inadequate data or poor preparation
- ❒ There is too much anger for the group to be productive
- ❒ Information could be communicated better through another medium

When to Meet

- ❒ Issues need clarification
- ❒ There are concerns to share
- ❒ The group wants the meeting
- ❒ Information is needed from the group
- ❒ The group needs to be involved in decision making

Pre-Planning

Preparing for a meeting includes deciding what kind of meeting is needed. There are different types of meetings including gatherings for:

- ❒ Information sharing and status updates
- ❒ Problem solving and decision making
- ❒ Learning and development
- ❒ Team building
- ❒ Hybrids of the above

The effectiveness of a meeting is affected by how much the facilitator and/or meeting leader prepare(s) in advance. When there is a reason to hold a meeting, the first step is to decide on the purpose of the meeting. As Steven Covey says, begin with the end in mind. Next, to give the meeting shape and form, it's important to ask the following questions:

- ❒ Is there a meeting outcome statement?
- ❒ Does an agenda need to be developed?
- ❒ Are the right people invited?
- ❒ Is the room the right size for the group?
- ❒ Does material need to be distributed beforehand?
- ❒ What equipment or supplies do I need?

Supplies

Having a good source of supplies is critical to having a good meeting. The best flip chart markers are Mr. Sketch™ (chisel type). They smell good and do not bleed through paper onto the walls. In addition, a few items to consider always having in the meeting tool kit include:

- ❒ 3M™ Masking Tape
- ❒ Aspirin
- ❒ Bandages
- ❒ Binder Clips
- ❒ Blank Overheads and Markers
- ❒ Breath Mints
- ❒ Clock with Extra Battery
- ❒ Dots for Voting
- ❒ Dry Erase Markers
- ❒ Extra Bulbs for Projector
- ❒ Hand Lotion
- ❒ Laser Pointer
- ❒ Name Tags
- ❒ Paper Clips
- ❒ Post-It™ Notes
- ❒ Push Pins for Fabric Boards
- ❒ Scissors
- ❒ Tums™
- ❒ White Out™
- ❒ Writing Instruments

Agenda Building Template

Almost every meeting can benefit from a comprehensive and well-thought-through agenda. We would like to share a quick and easy (once you get used to it) way to build an agenda that works every time. The agenda building template is illustrated below. When populating the cells of the template, it is important to work from right to left, starting with the end in mind.

- ❒ **Check your list regularly.** Periodically review your list. Look at it first thing in the morning, without fail. If you make sure that everything you intend to do gets on your comprehensive list—and if you check that list regularly—there is little chance that anything will fail to be done just because you forgot about it.
- ❒ **Order smartly.** Start with the most important task and work down. If you accomplish nothing other than your number one priority, you'll be ahead. Avoid the temptation to tackle fun or easy tasks first just because you like shorter lists.
- ❒ **Assign a date and time for the items on your list.** Most people use their planning diaries for meetings and appointments only. Use yours to schedule tasks as well. If you put only appointments and meetings on your planner, when someone calls and wants to meet with you, if nothing is written down, the entire day seems to be available. That's a big mistake! Important tasks should be logged in as well as appointments and meetings.

Sequence	Duration	Who	Module	Outputs	Outcomes

RESOURCES

175 Ways to Get More Done in Less Time by David Cottrell and Mark Layton

Beyond Time Management: Business with Purpose by Robert Wright

First Things First by Stephen Covey, Roger Merrill, and Rebecca Merrill

Getting Things Done: The Art of Stress-Free Productivity by David Allen

The 10 Natural Laws of Successful Time and Life Management by Hyrum Smith

The Organized Executive by Stephanie Winston

The Procrastinator's Handbook by Rita Emmett

The Time Trap by Alec Mackenzie

Time Management for Dummies by Jeffrey Mayer

Time Management from the Inside Out by Julie Morgenstern

Time Management: Get More Done with Less Stress by Efficiently Managing Your Time by Marshall Cook

Time Tactics of Very Successful People by Eugene Griessman

ABOUT THE AUTHOR

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Marta's books include Work Miracles: Transform Yourself and Your Organization; Balanced Leadership: Stretch for Self, People, and Enterprise Mastery; and Live a Difference. Her credentials include a Ph.D. in organizational psychology from Virginia Tech, a graduate internship in human resources research with BellSouth Corporation, and a post-doctoral apprenticeship in industrial engineering with Dr. D. Scott Sink, president, World Confederation of Productivity Science.

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