REDUCING THE PAIN, INCREASING THE GAIN

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Student Organization Leadership Conference – Fall 2015

OR

HOW TO MAKE YOUR MEETINGS MORE EFFECTIVE

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Why meetings are important

- Expensive…or Priceless?
- Shared experiences
  - shared understandings
  - joint action

Very tiny summary of theories of social construction

1. Meanings exist because we agree that they exist.
2. These agreements emerge as we repeatedly refer to them as if they exist when we communicate with others.
3. Social agreements make joint action possible (and make living with others much easier).

What is joint action?

Joint action is acting on a shared objective but not doing the same thing to get to get there.
Very tiny summary of theories of social construction

- **Examples of social agreements**
  - Time—clocks, calendars, time zones
  - Traffic rules
  - National, state, and province boundaries
  - Lots of examples...

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Very tiny summary of theories of social construction

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Why meetings are important

- They are opportunities to create shared experiences
- and shared meanings
- which can lead to joint action
Why meet?

- We meet to solve problems beyond the scope of a single person or unit.
- Interacting people create and change organizations.
- Building buy-in is imperative for execution.
- We want to harness stakeholders’ voices productively.
- Shared meaning enables joint action.

Joint action = effectiveness

The (single) Meeting

Designing
Executing
Debriefing and next steps / follow-up
Designed for effectiveness?

Draw these activities to scale, based on the time you spend on them

Designing   Executing   Debriefing & next steps / follow-up
Planning a meeting

- What we usually do well:
  - When and where can we meet?
    - Establish the calendar date, start time, and location
  - What is the issue?
    - Identify the focusing problem or question—but it’s usually expressed as a nebulous noun

Planning a meeting

- What we usually don’t do well:
  - When can we stop meeting?
    - Establish an end time as well as a start time
  - What is the desired outcome?
    - Articulate what we want to have accomplished by the meeting’s end
  - How will I create shared focus at the start?
    → Try a verb phrase or a full question!
Simple tools → Big differences

Make Progress
Planning the Meeting

Initiative / Project Name:
______________________________________________

Objective / Focusing Issue:
What do we need to discuss?
Tip: Phrasing this as a question often helps clarify focus—or try
finishing one of these phrases: How to... or I wish I knew...
______________________________________________

Desired Outcomes:
What deliverables will this meeting produce? Note: Agreement or
awareness can be a deliverable, as can a tangible product.
______________________________________________

Key Participants / Stakeholders
Who (name, representing whom?)    Why (expertise? buy-in?)
______________________________________________

Possible Processes for Conducting the Meeting

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<th>Process</th>
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Examples

Possible desired outcomes, 1/30

- Preliminary id of stakeholders to analyze
- Preliminary scope of activities to engage
  COB/MGMT in "direction" conversation
- Other?
Meeting Planning Worksheet
Sagebrush Steppe Vegetation Workshop

DATE AND TIME: Monday, August 29, 1:00 – 5:00
Tuesday, August 30, 8:00 – 4:00

LOCATION: USGS Office, Northern Rockies Science Center, 3230 University Way, Suite 2, Bozeman, MT 59715

FACILITATOR: Laura Black

ISSUE(s): To explore options for integrating sagebrush steppe vegetation local monitoring data within the GNLCC

DESIRED OUTCOME(s): By the end of this meeting, we will have:
- A shared vision of what we can accomplish by leveraging existing ongoing work on sagebrush steppe vegetation.
- Familiarity with one another and the nature and extent of sagebrush-community monitoring that each of us does.
- Collective information and some understanding of:
  - Past, current, and future collection of sagebrush vegetation data;
  - Sampling and analytical methods used; and
  - Ideas on how to approach multi-scale analyses.
- Next steps to synthesize monitoring data and analyses of sagebrush steppe vegetation communities.

### What (Content)
- Roles
- Desired Outcomes
- Agenda
- Ground Rules
- Decision Making

### How (Process)
- Role contracting
- Revisit Desired Outcomes
- Review agenda
- Propose / build ground rules
- Consider decision-making by emergent consensus

### Who
- Agent: Laura

### Time
- 10

### Materials
- Map and push pins?
- Name tags
- Tents
- Notepaper (for individuals) and pens

### Introduction to purpose/focus
- Open the meeting with a brief overview of the purpose, context, and focus for this workshop.
- Introduce the key roles for this workshop.

### Introduction to participants
- Introduce the participants by having each participant: Name, agency, monitoring location, 1 thing learned from work during the last year.

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Executing: The meeting DIAMOND

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Turning the Corner

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The meeting DIAMOND

- A good meeting has an opening out, or diverging conversation from the initial “point of departure.”
- Making meeting participants “turn the corner” and agree on a decision before they have aired options (thoughts, feelings) results in decisions that don’t “stick.”
- A good conversation converges, or narrows down, before the meeting concludes.

Understanding the “shape” of a good meeting can keep us from panicking when others don’t agree with us at the outset.

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The meeting DIAMOND

Adapted from Facilitating Change, ©1996 Interaction Associates
Beginnings and endings

- **Desired outcomes**
  - Can be **tangible** (a list of options for…; identified next steps to…) or **intangible** (an agreement to…)
  - Be **explicit** —and make them **visible**!

- **Bs and Cs and Next Steps**
  - **Benefits** / +s – What was good / useful / fun about what just happened?
  - **Concerns** / ∆s – “How to…” and “I wish I knew…”
  - **Next Steps** – For each concern, identify Who / What / When

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The meeting DIAMOND

- **Opening out** (generative): Structured processes for brainstorming, generating
  - Ensure equitable participation from everyone
  - Keep the meeting from converging too soon or diverging too long
  - **Tip**: Make sure question/problem is well-posed—and participants are willing to address it
  - **Tip**: Cue participants up front—e.g., before first idea is spoken, remind “no censoring, no criticizing, no evaluation—just get the ideas out”
Useful phrases

- **Opening:**
  - Here’s what I hope we'll accomplish in the next 45 minutes... (point to desired outcomes)
  - To make sure we’re taking a broad view of this... (explain divergent process)

The meeting DIAMOND

- **Narrowing down** (selective): Structured processes for selecting which items generated merit more attention
  - Ensure equitable participation from everyone
  - Ensure a rationale (and sense of fairness) in focusing on some items to the exclusion of others
  - **Tip:** Check whether divergent products address question / problem
  - **Tip:** Prevent premature closure / false consensus: Have discussions before polling or gradual elimination

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Useful phrases

- **Closing:**
  - So before we close out, let’s take stock of what was useful and what concerns we still have... (introduce Bs and Cs)

The meeting DIAMOND

- **Turning the corner:** Clear transitions that cue participants that process / shape / objective is changing
- **Useful phrases:**
  - I want to do a process check... Are we ready to consider which of these ideas we want to move forward?
  - Does anyone have ideas we haven’t heard yet?... If not, then...
  - Have we covered the terrain of options for this?... If so, then....

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Beginnings and endings

- **Desired outcomes**
  - Were they achieved?

- **Bs and Cs and Next Steps**
  - Follow-up *begins in the meeting*
  - Debrief visibly, real-time
    - **Benefits** / +s – What was good / useful / fun about what just happened?
    - **Concerns** / ∆s – “How to…” and “I wish I knew…”
    - **Next Steps** – For each concern, identify Who / What / When

Premise

- **People want to be competent**
- **If we tell them how to be competent…**
  - They cooperate
  - They are surprisingly grateful for structure
Facilitative physics

- The one who holds the pen holds the power
- Move close to disruptive people
  - Help them feel heard
  - From their physical position, engage others
  - If necessary intimidate them with your presence
- Use pink erasers if necessary 😊
- Others?

Visual representations

- Throughout any meeting, use visual representations!
  - Bold
  - Ugly
  - “Real”
Visual representations

**Important and useful** because...
- “How do I know what I think until I see what I say?”
- Create a shared experience
- Serve as shared memory
- Eliminate many “bad” meeting behaviors
  - E.g., wandering off-topic, repeating previous points
    - How does this relate to our desired outcome of …?
    - Is what you’re saying different from this (point to board)…?
- Take a picture for fast, useful meeting documentation

To be effective, visual representations should function as “boundary objects.”
A robust boundary object represents dependencies among participants (relatively) concretely and is transformable by all participants.
Meetings: A continuum

What kind of meeting is appropriate?

Convey information
- Update status / report on ongoing work
- Publicly confirm big decision
- Obtain input / collaborate on outcome

Complexity of desired outcome

- Don't have a meeting!—send an email or memo
- Have a stand-up meeting (20 minutes or less)
- Before: Plan what, who, how
- During: Identify ground rules, roles
- Use shared visual representations
- Facilitate the processes
- End with Bs and Cs and NSs
- After: Share documentation, check on NSs
- Next meeting: Start with NSs from previous meeting

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Liberation!

Meeting roles

Decision making ≠ meeting

Continuum of meetings

Roles: Facilitator responsibilities

- **Planning**
  - Desired outcome
  - Participant / stakeholder analysis
  - Agenda / meeting roles / process choices

- **Conducting**
  - Ground rules
  - Decision-making processes in meeting
  - Meeting roles executed

- **Closing**
  - Comparing desired outcome to actual outcomes
  - Leading Benefits / Concerns / Next Steps /WWW conversation

- **Following-up**
  - Ensuring documentation shared
  - Checking on WWW for Next Steps
  - Beginning the next meeting with updates since last meeting’s closing
## Roles: There are many!

- **Participant**
- **Leader**—aka meeting owner
  - Calls
  - (Maybe) designs
- **Facilitator**
  - Designs
  - Manages in-meeting processes and conversations (not content!)
- **Recorder** / scribe
  - Documents elements of processes, conversations, outcomes during meeting
  - Distributes documentation post-meeting
- **Other**

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## Roles: There are many!

- You can own and call the meeting and not participate.
- You can own the meeting and participate but not facilitate.
- You can facilitate the meeting and not scribe.
- You can change roles across and even within meetings as long as you’re clear—with yourself and others—about what you’re doing.
Roles

- Do NOT default to playing all roles!
  - No, no, no!
- Expand your group members’ capabilities.
- Expand your group members’ expectations for meeting quality and productivity.

Decision making ≠ meeting

- Be as clear as you can about the decision making process for each desired outcome.
- If you aren’t, people may infer that talking about an issue means the decision-making process is consensus.
  - That means they get upset if outcome is different from their perception of what was discussed.
Decision making: A continuum

- Decide and announce
- Gather input from individuals, decide, and announce
- Gather input from group/team, decide, and announce
- Decide by consensus
- Delegate with resources/constraints
- Create collaborative outcome

Time Required, Number of People Involved

Level of Ownership

Adapted from Facilitating Change, ©1996 Interaction Associates

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Decision making

- When choosing a process, consider:
  - How important is the decision?
  - How much time is available?
  - What information is needed?
  - How critical is buy-in?
  - What are people’s capability levels?
  - Do we need to build group capability?

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Some practical references

- **Michael Doyle and David Straus**
  - *How to Make Meetings Work*
  - *How to Make Collaborations Work*

- **David Sibbett**
  - *Visual Meetings*
  - *Visual Teams*
  - *Visual Leaders*

- **Michael Brassard**
  - *Memory Jogger Plus*