MEETING DESIGN FOR BUSINESSES LARGE AND SMALL:

When and how to schedule a meeting

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People find department meetings daunting on several levels. First, they become all too familiar, leading to the mundane and the repetitious. Second, they become second thought: rules get relaxed, protocols abandoned. Finally, because they become near institutions, department meetings rarely become the topic of reinvention and innovation. Assumptions of form and necessity lead to dysfunction and disengagement.

It doesn't have to be that way. Viewing meetings through the lens of design can help reinvigorate them, foster engagement and create a shared sense of ownership. Reexamining meeting design can also better integrate technology investments, new organizational priorities and new team members. Meeting design, no more so than customers service processes or factory lines, should be subject to continuous improvement.

How to Design a Great Meeting

A great meeting may be efficient, sharing information quickly so that people can take the new information back to their work and apply it. A great meeting may be engaging, giving people permission to innovate and explore. A great meeting may systematically examine data in order to weigh options and make the best decision possible under the circumstances. A great meeting may introduce people to new ideas, new colleagues or just make time for people to interact.

For all of these meeting experiences, one thread can be found that connects them, a design document that sets expectations and places constraints on time and activities: the agenda.

Take this scenario for example, and it may sound familiar: Rachel volunteers to plan the next department meeting. She gets out the list of open items from the last meeting and lists the projects that require status updates. She scans her e-mail for notes from her manager that contain policy items worthy of reinforcement. A few hours before the meeting, Rachel

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sends out the agenda via e-mail. As the meeting commences, Rachel displays the agenda. It is clear most people haven't seen it before, and if they have, they just glanced at it. Defeated, Rachel, gives in, "Fine, let's just get through this." And off the meeting goes. People fumble with cables as they swap between presentations. People tune in and out, some just disappear into silence. One presenter has technical difficulties with his presentation, so Rachel asks for a copy of the presentation via e-mail, loads it and drives, as Alex talks through the slides on the phone.

Rachel, like many meeting planners, believes department meetings to be more of a continuation than a discrete event. Sometimes meetings don't even have a meeting manager like Rachel. Coming together at the last minute, the assembled group pounds out a list of items they collectively want to accomplish—negotiating and revising along the way until it's time for their next meeting. While these are common practices, they aren't effective. None of them considers the totality of the meeting experience, nor do they methodically consider design.

Although managers like Rachel ask people for feedback on the agenda, or ask them to contribute something specific, they seldom ask meeting attendees what they want to get out of a meeting, or what they would like to contribute. Those are subtle distinctions. The former approaches meeting design as an inclusive activity, the later, as an exclusive activity. Meeting designers who want to purposefully engage others in a meeting need to think inclusively.

A good agenda balances between many things: information dissemination, receiving information, working through a problem and decision making. In design, objects can appeared skewed, yet remain in balance. 20th Century sculptor Calder famously employed several disparate items to achieve balance in his sculptures. Agendas should seek balance in their disparate parts. If the majority of a meeting needs to focus on information dissemination, breaking up the flow with Q&A during the presentation can lead to balance, whereas waiting until the end, can create imbalance because so many ideas and words have come before, that the now exhausted listeners no longer have the strength to rally toward a question.

Meeting design requires that the organizers think beyond the meeting as a factory for decision making or information dissemination. Look at all meetings from the attendee perspective rather than the organizer's perspective and ask questions like:

- Why would this person want to be here?
- What will this person learn that he or she can use?
- Is this person responsible for, even interested in, the decisions being made?
- Would this person be more effective somewhere other than in this meeting?

Meetings are discrete events. Because people are in one meeting, doesn't mean they should be in the next one. Don't try to do too much with a departmental meeting. Seek those areas of common interest and common contribution as the foundation. When introducing something that the entire team may not care about or be responsible for, ask the presenter to find a way to connect it in a meaningful way. How does it relate to strategy, to company performance, to another project? The meeting designer needs to help the meeting participants see the design in what they do.

As a design document, the agenda should also set expectations for space, technology and practice. Where the meeting is to be held, and what capabilities that space holds, should either be included, or readily available to attendees. If people need to brainstorm or meet in small groups, the design should accommodate those items before selecting the location.

As for technology, the content repository, the collaboration technology and any tasks or other assignment technology should also be clearly noted. Any practice provisions should be referenced, both for reinforcement and for introduction. People who think they know how things work often become complacent, and those new to a situation often don't receive a proper introduction to the practices they will encounter. Organizations interested in better design need to keep their principles handy. In our earlier example, Rachel should have known that people would be joining the meeting online, so she should have made sure everyone involved knew how to do that and what should happen after the connection was made. And as for the presentation, it should have been posted to a central collaboration repository before the meeting, not left to last minute e-mail for dissemination.

The best meetings only invite people who really need to be in the meeting. If people can get the information just as effectively in other ways, if technology can contribute to problem solving or information sharing, then use that instead. Reserve meetings for necessary focal points designed to create an outcome.

7 Tips for Designing a Great Agenda

- Seek balance in agenda design to ensure that organization and attendee needs are met.
- Ensure that all material is posted to the repository prior to the meeting.
- Specify the location for the meeting, and various technologies that will be used (links to online meetings, dial-in numbers, etc. should all be included).
- Provide links to supporting documents and references.
- Reference all meeting protocols that people should observe, and all agreements made between team members prior to the meeting.
- Ask for feedback on the first draft of the agenda to make sure nothing is missing.
- Only invite the people necessary to fulfill the agenda's items.

How to Implement a Great Meeting Design

Meeting design doesn't stop with the agenda or when the attendees arrive. Meeting design requires implementation.

Rachel asked that people post material to the repository before the meeting, so in her meeting prep, she should check that space to see what people have posted. As an organizer, show up and start the online meeting before others arrive. Bring up the shared information space created for the meeting and load the agenda. Good meetings don't start by waiting for the meeting leader to arrive and get settled in. Welcome people, make guest introductions and get started.

As the owner of the first agenda item starts, review expectation tags from the agenda so that people know what they should expect: are they to receive information, contribute it, to help make a decision, or to work through a problem? This will help people select tools and adjust listening and engagement styles.

The meeting organizer, the attendees, and most importantly, the person or team presenting, needs to respect time boundaries—and if the meeting protocols don't permit e-mail, texting or chatting, then call people out when they violate those agreements. And if they permit them, let people do what they need to do.

Back channels are a good example of where technology completely changes the meeting dynamics and the quality of the information. If those channels are transparent and designed into the structure of the meeting, they can be constructive ways to engage, capture decisions and share information. Instead of taking a note to assign a task to someone after the meeting, assign it to them during the meeting. In-meeting collaboration work reduces error or omission, while increasing awareness and commitment to the work.

As Rachel learned, how to integrate remote attendees proves a particularly challenging part of meeting design. People need to acknowledge virtual attendees, create pauses where they can interact, and monitor the online chat panel. Video conferencing helps remote attendees be more "present" than audio alone. Make sure the remote attendees can see and hear everything that the technology allows. If most people join the meeting online, ask everyone to join through the online meeting in order to create a common meeting experience. This approach ensures remote cues will be visible to all, regardless if people attend physically or virtually.

Finally, recognize the kind of activity an agenda item calls for. Some meetings get so rigid and focused on timelines and protocols that they have a hard time shifting to looser models for tasks like brainstorming. Well-designed meetings recognize necessary constraints and essential permissions. If the majority of the meeting focuses on information dissemination and analytical decision making, it may be better to hold a separate meeting for more creative tasks. More creative meetings require their own design considerations.

Why Not Change the Culture?

The idea of culture change leads to abstract and academic discussions that often fail to translate into action. By seeing policy and practice as the embodiment of culture, organizations can become very specific and very granular about the behavior they expect and the boundaries of acceptable performance. By changing definitions of rightness and by redefining behavior, culture changes without the need for abstract conversations. What people should do, and what they end up doing, are both areas where direct interventions can occur. Spend time developing policies that people find useful, and helping people reflect those policies in the way they work.

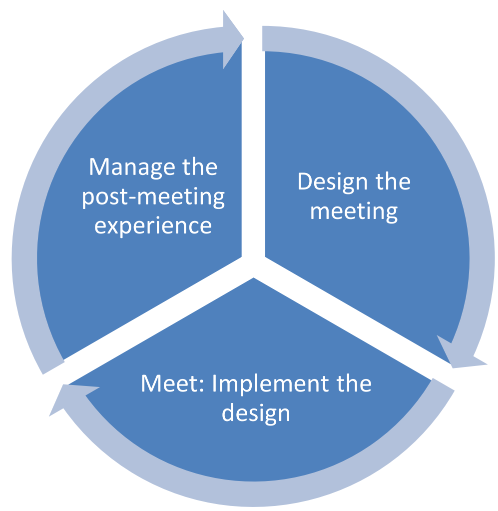
12 Tips for Designing a Great Department Meeting Experience

- Keep purpose and outcome central to the design.
- Don't try to do too many things in one meeting.
- Create special meetings to focus on divergent activities like innovation or brainstorming.
- Mutually agree on protocols and meeting rules.
- Provide ample space (physical and virtual) for planned activities.
- Make sure the tools required (flip charts, pens, paper, WiFi, etc.) are available prior to the start of the meeting).
- Effectively integrate collaboration technology in meeting:
  - Put all of the meeting notes into one place, with links to the original source of complementary materials. Do not ask teams or functions to duplicate existing material just for a meeting. Link to it!
  - Plan to start video and initial screens to be shared prior to the meeting so that the meeting can start on time.
  - Decide what "back channel" will be used to communicate during the meeting so that all "side" conversations can be seen by all attendees.
  - Prepare all host computers for presentations. Test the connections and transitions from one computer to another, to minimize device swap time.
  - Make sure everyone is aware of the cues and signals from remote attendees that indicate they have a question or are ready to contribute.

How to Manage the Post-Meeting Experience

Meetings lead to tasks that require completion, follow-up conversations and activities, and information sharing that is often more important than was shared during the meeting. Haphazard approaches to the distribution of post-meeting materials results in confusion, increased coordination costs and unhappy team members.

Consider the post-meeting experience a part of the agenda process, not as an afterthought or separate issue. Everything from the meeting should be funnel into the after meeting experience, and loop back to designing the next agenda.



The Integrated Meeting Experience

6 Tips for Great Post-Department Meeting Design

- Engage attendees via enterprise social media so responses to questions and related comments are communicated in a transparent way.
- Capture notes and action items back into the repository, preferably as links that can be referenced in ongoing discussions.
- Deliver actions (decisions or questions) affecting other teams or functions promptly and accurately.
- Provide links to relevant information referenced in the meeting and stored in other repositories.
- Cycle back to the team before finalizing the next agenda.
- Keep a running list of potential items that will add variety to the meeting.

One of the biggest mistakes after a meeting is to make the meeting more important than the projects or other activities for which the meeting was created to provide status. This is especially true of functional or department status meetings where people report about cross team activities. Avoid asking people to create special materials just for a particular meeting, or to duplicate materials they already have. A good design requests links to relevant content. By letting work reside in its home location, focus remains with the actual work, it avoids duplication, it broadcasts a respect for the project and its participants, and it keeps coordination costs down.

Rachel Uses Citrix Tools to Meet with Purpose

Before the next meeting, Rachel posted the agenda to the shared Podio repository, with a link to the GoToMeeting session information. Before she wrote the agenda, she created a discussion thread in Podio about the agenda, asking people about expected outcomes and the necessity of certain items. From the feedback she received there, some items fell off the agenda and others were emphasized. One team member volunteered to share lessons learned about mobile devices in customer service, an idea that might apply to several department initiatives. Alyssa attended the meeting without fluster, because she had worked out with her fellow meeting attendees before the meeting that she would occasionally communicate via tablet with her direct reports due to an impending deadline. She agreed to do so discretely and specifically at points in the meeting that didn’t involve her. Rachel ensured that all material was posted before the meeting, that comments on the items, and on the agenda, informed next steps. During the process check at the end of the meeting, Rachel shared a draft agenda for the next meeting for initial comment and then asked for feedback, as people considered important items over the next week. After the meeting, Rachel securely sent the slide deck from the meeting to attendees via ShareFile.

Meeting Tips for Smaller Businesses

Meeting design applies to organizations large and small, with very specific caveats. The most significant difference comes from technology, which smaller firms may acquire as a service. Without deep information technology resources, smaller firms often rely on the supplier of the service for information about how to apply collaboration technology to meetings, but this information is necessarily generic. Small companies need to involve everyone, not just technology-oriented individuals, in the adoption of collaboration technology. Every person in the firm has to take responsibility for understanding how to work the technology, and how to work better together when using it.

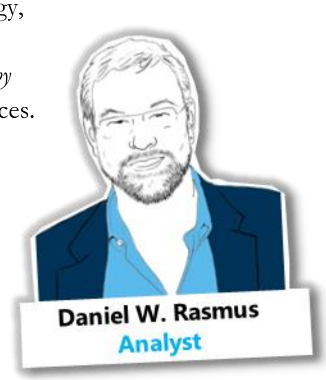
Some very small companies will consider themselves small enough that everyone gets together in a room to discuss issues and make decisions. But that isn't always the reality. Even in small companies, people often travel. Perhaps they occasionally work from home, and in-office attendance affected by work-life balance issues can be more random than in larger firms because work is spread across a much smaller pool of people, making an absence more noticeable. Everyone in a small firm needs to be as competent and efficient with collaboration technology as possible. If they aren't, any collaboration technology investments will likely result in marginalize use, not deep integration. Small organizations must invest in how they work, and therefore, in the design of work, or they will miss important aspects of competitive advantage. Better products, smarter people, and more focus on quality only gets them part of the way. For small firms, working well together, leveraging the extremes of time and location, connecting to customers in real-time and consistently applying process in a system that offers rapid adaptation can be the difference between profit and loss, between securing a new customer or losing an existing one.

6 Tips for Designing Effective Meetings for Smaller Organizations

- Develop agendas that balance between operational tactics and strategic thinking.
- Train everybody in the use of selected technology services.
- Acknowledge variations in meeting attendance driven by travel or personal need, and integrate online meetings so all participants can effectively attend.
- Integrate professional development into team meetings whenever possible.
- Capture notes, action items and other meeting results, documents and outcomes in ways that they can be easily searched and rediscovered, preferably in the cloud.
- Only call for long meetings when necessary. Otherwise, integrate information sharing, decision making and other activities into the work stream to maximize efficiency.

About the Author

Daniel W. Rasmus, the author of *Listening to the Future*, is a strategist and industry analyst who helps clients put their future in context. Rasmus uses scenarios to analyze trends in society, technology, economics, the environment, and politics in order to discover implications used to develop and refine products, services and experiences. His latest book, *Management by Design,* proposes an innovative new methodology for the design workplace experiences. Rasmus' thoughts about the future of work have appeared recently in *Chief Learning Officer Magazine*, *Talent Management* and *KMWorld*. Rasmus is an internationally recognized speaker. He has addressed audiences at CeBIT, KMWorld, The Front End of Innovation, The National Association of Workforce Boards, ProjectWorld, The CIO Association of Canada and Future Trends. He writes regularly for *Fast Company, iPhone Life* and *PopMatters*. Rasmus is the former Visiting Liberal Arts Fellow at Bellevue College in Bellevue, WA where he continues to teach strategy and social media.



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