



# How to Design a Superior Meeting Experience

June 5, 2013

Daniel W. Rasmus

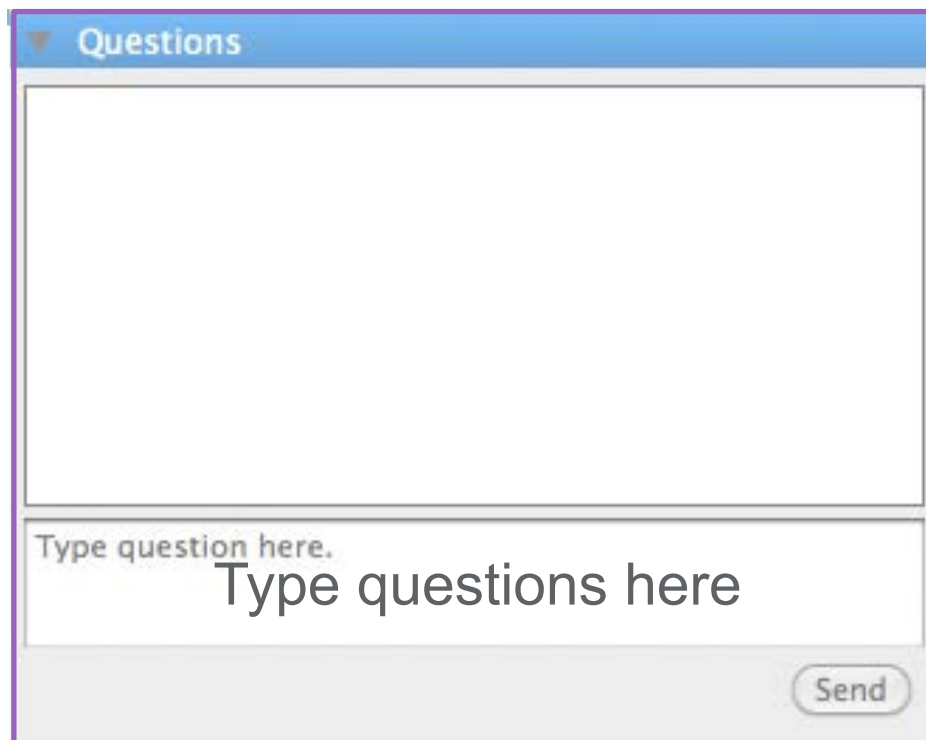
# Moderator

**James Hilliard**  
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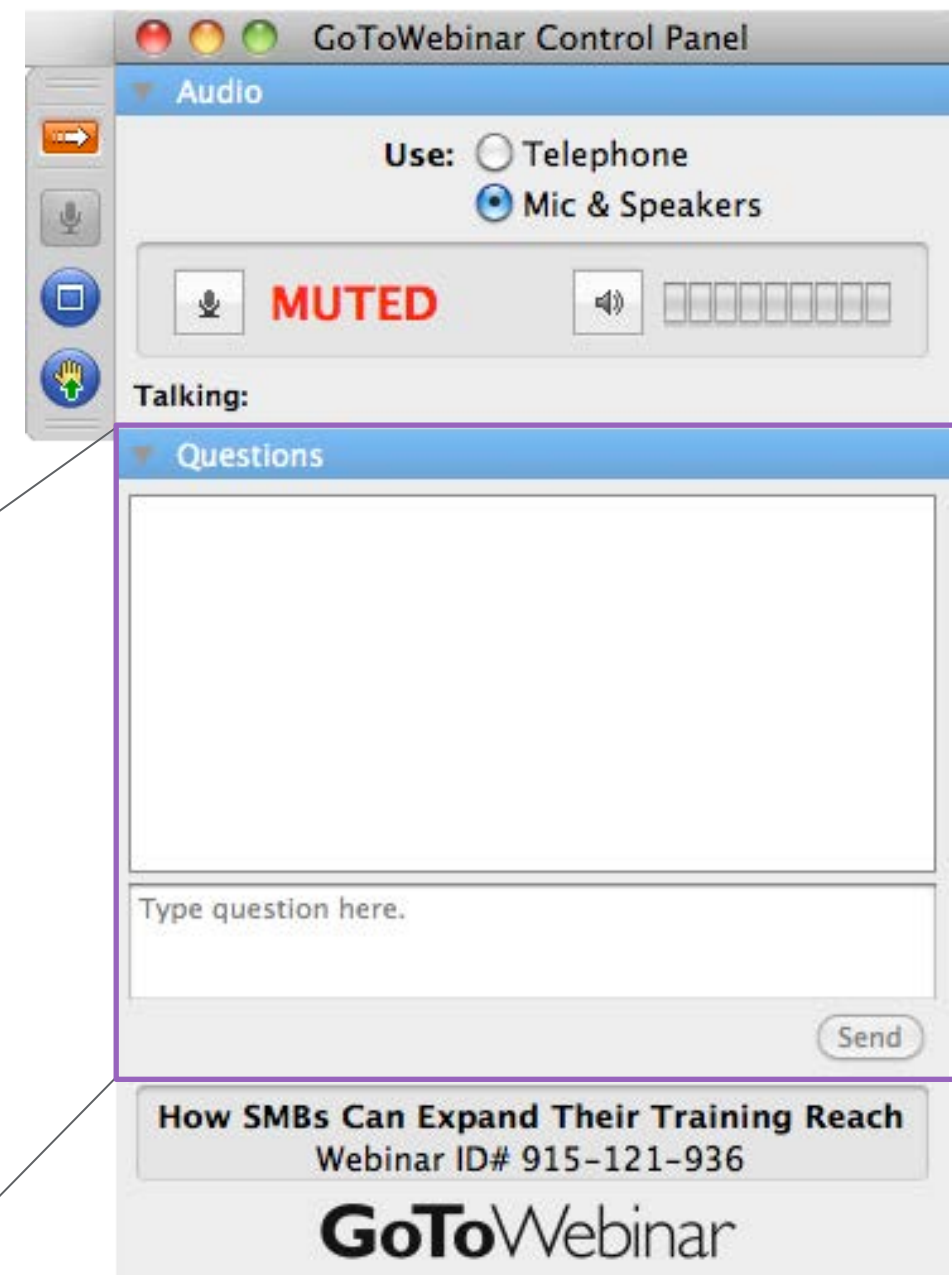


# Q & A

Text only questions  
and comments



A zoomed-in view of the 'Questions' panel. It features a large text input area with the placeholder text 'Type question here.' and a 'Send' button at the bottom right.



The GoToWebinar Control Panel interface. It includes an 'Audio' section with options for 'Telephone' and 'Mic & Speakers', a 'MUTED' status indicator, and a volume slider. Below the audio section is a 'Questions' panel with a text input area and a 'Send' button. At the bottom, there is a banner for a webinar titled 'How SMBs Can Expand Their Training Reach' with ID# 915-121-936, and the GoToWebinar logo.

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# Presenter

**Daniel W. Rasmus**  
Author and Strategist





# How to Design a Superior Meeting

Daniel W. Rasmus



Daniel W. Rasmus  
Analyst

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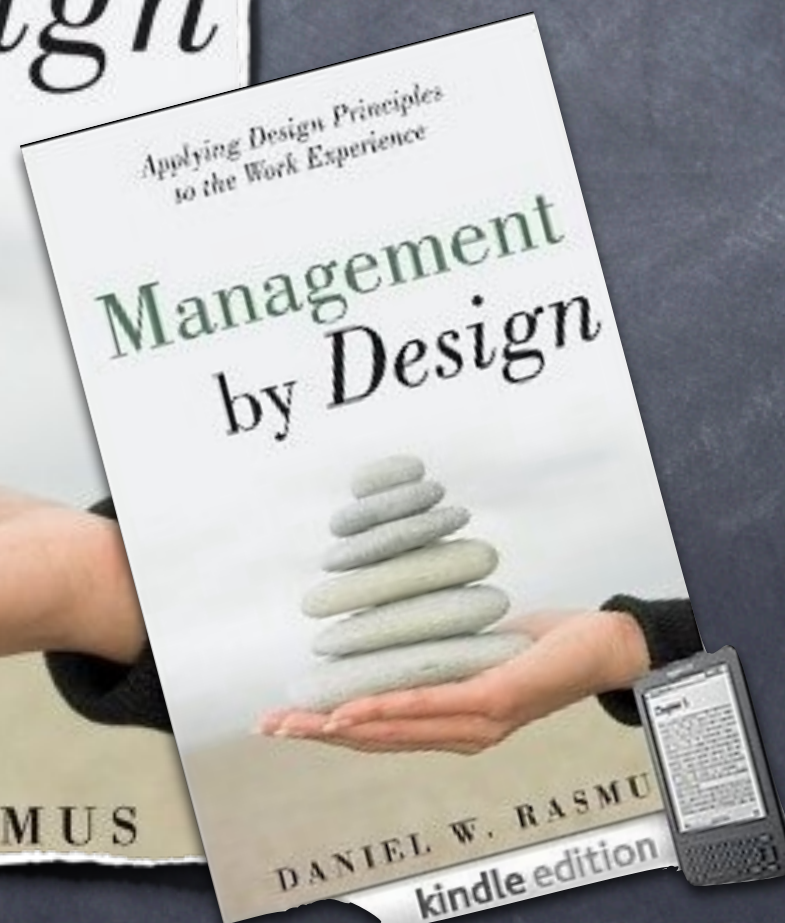
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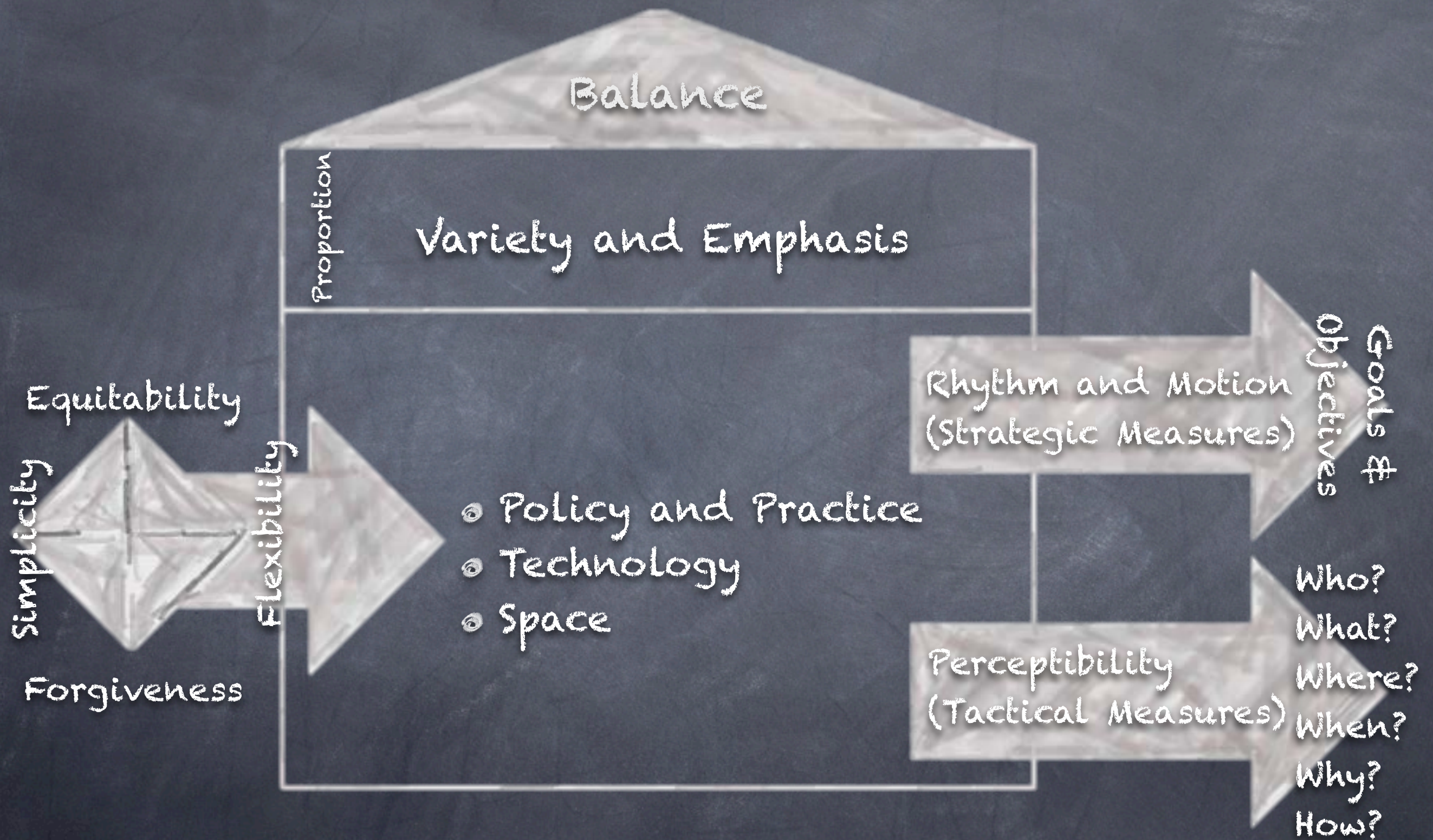


# Management by Design



<http://danielwrasmus.com/management-by-design/>







Here's the  
agenda. I  
just threw  
something  
together

Meetings by Design





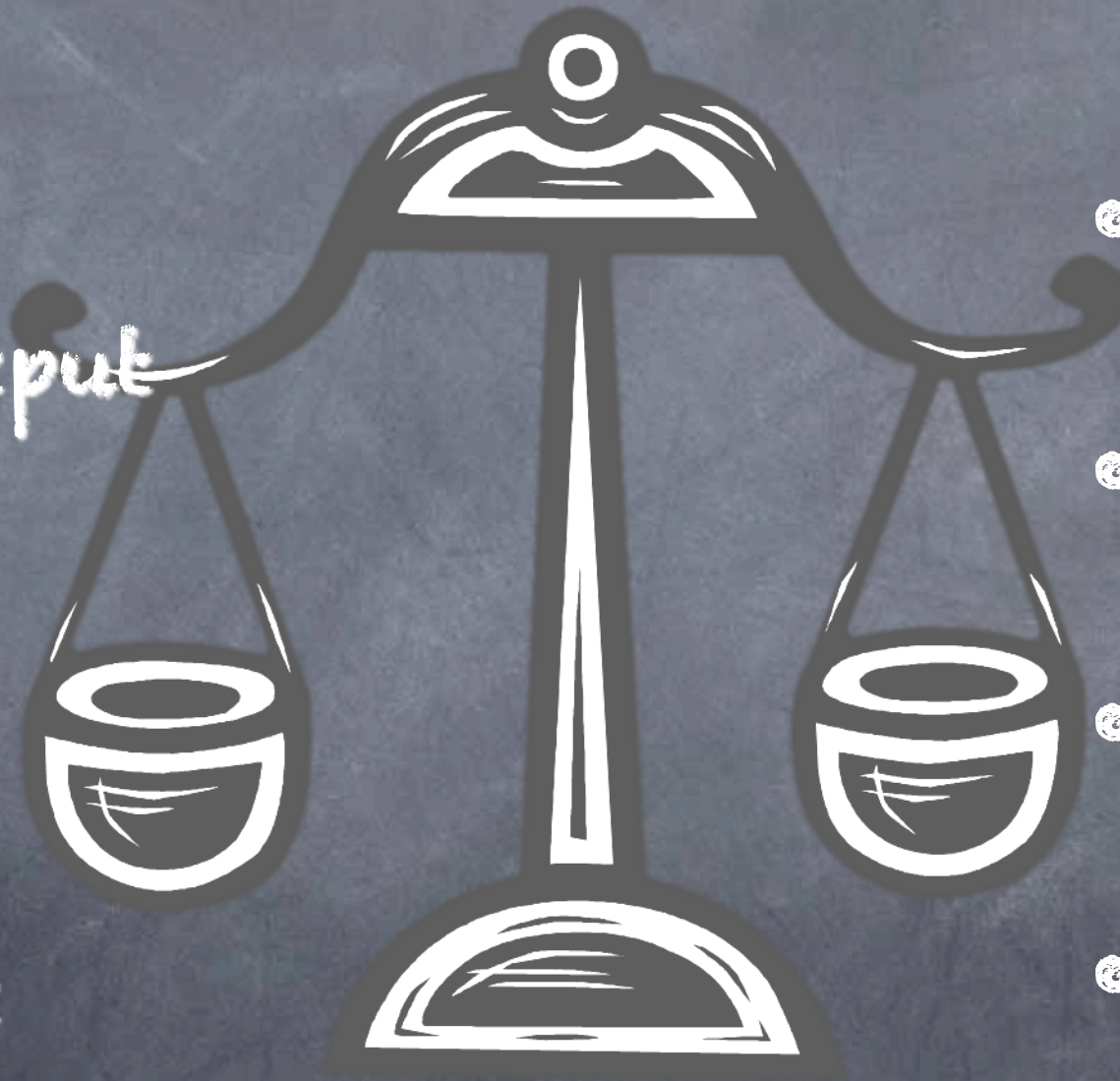
# Why We Hold Meetings

- ▶ To see people
- ▶ To show them cool charts
- ▶ To make the organizer feel important
- ▶ To provide a place to point with a stick or highlight things with a laser pointer
- ▶ To feed people (and eat) donuts, and
- ▶ To impress colleagues with insight and erudition



# Balance

- Team
- Task
- Process
- Directed Output
- Efficiency
- Perception Change
- Constraint Management



- Individual Learning
- Relationship Building
- Emergent Outcomes
- Information Dissemination
- Freedom to Innovate



# Variety & Emphasis Proportion

Project  
Status

Upcoming  
Reviews

Speculation  
about the  
Reorg...

Process  
Feedback

The  
Week  
End

Celebrate  
Success

Announcements

Who's New

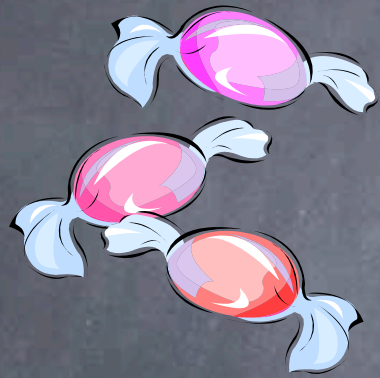
Birthdays!

The Rat  
Hole

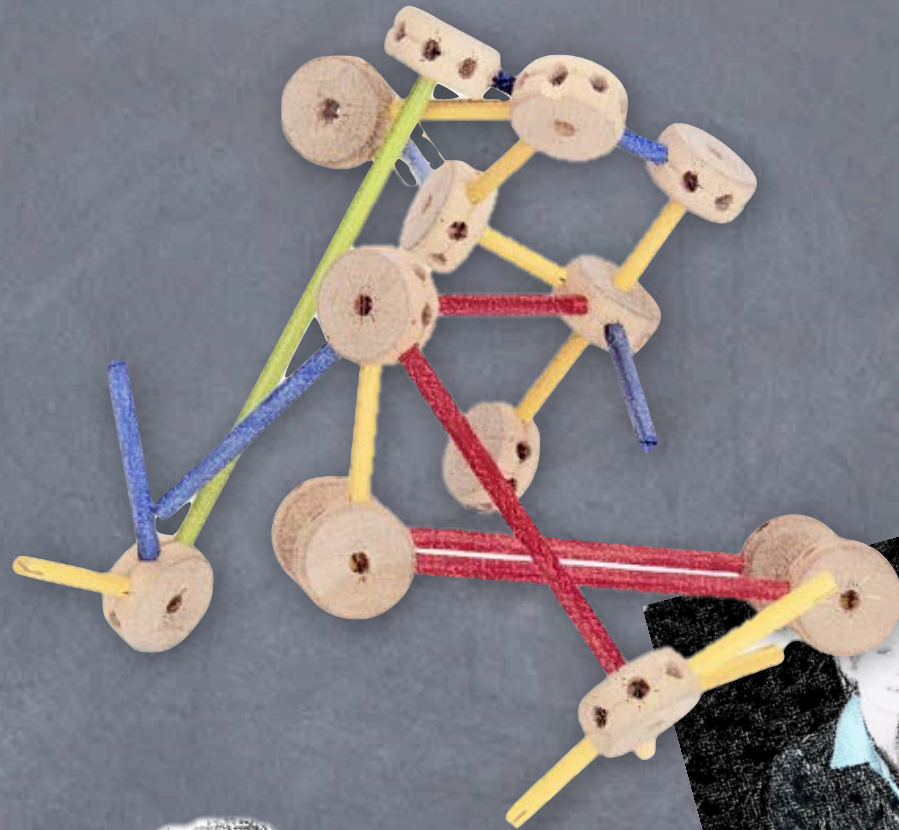




# Variety & Emphasis



Special Topics





# Organizing Through the Eye of the Attendee

- 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?

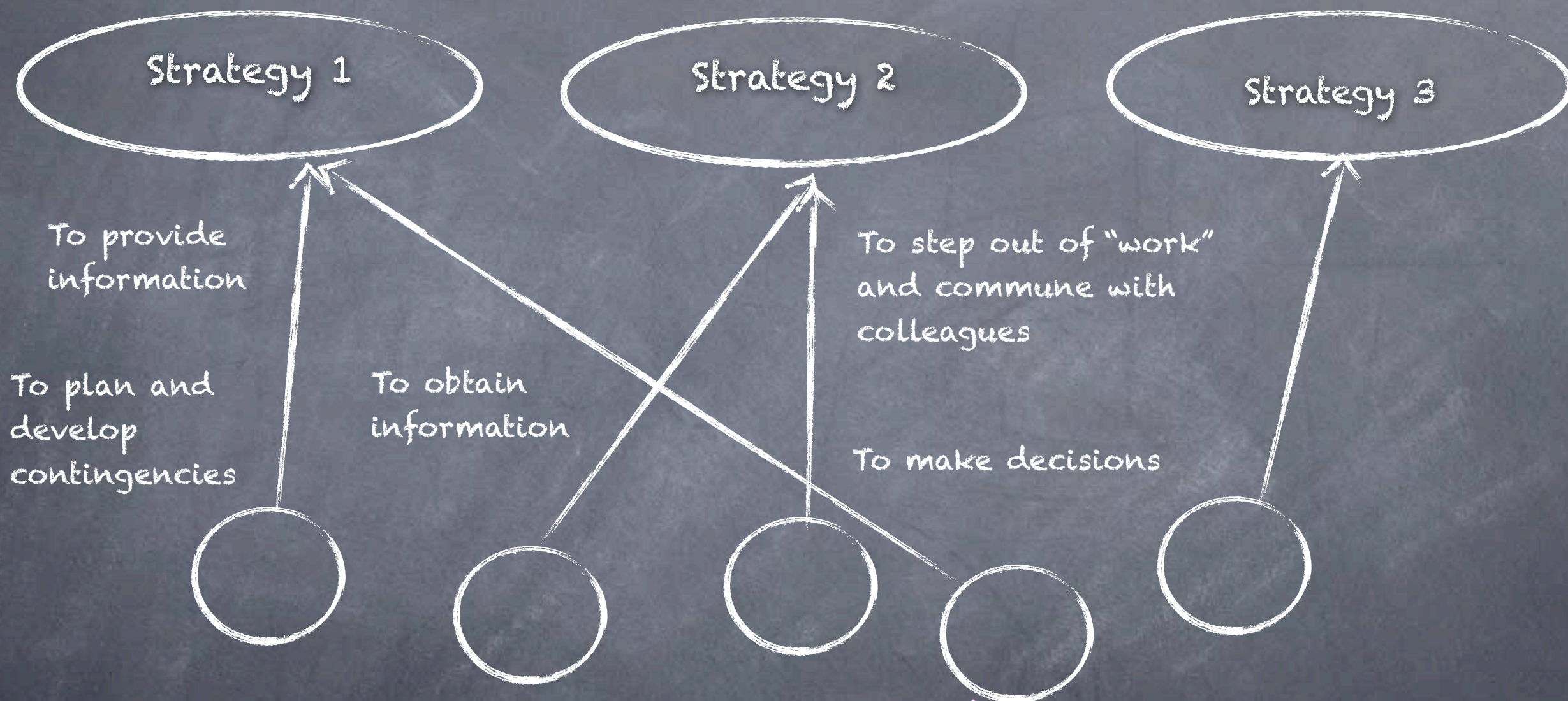




STRATEGIC

# Rhythm & Movement

## Why We Hold Meetings



What is the meeting's impact?  
What will change because you met?

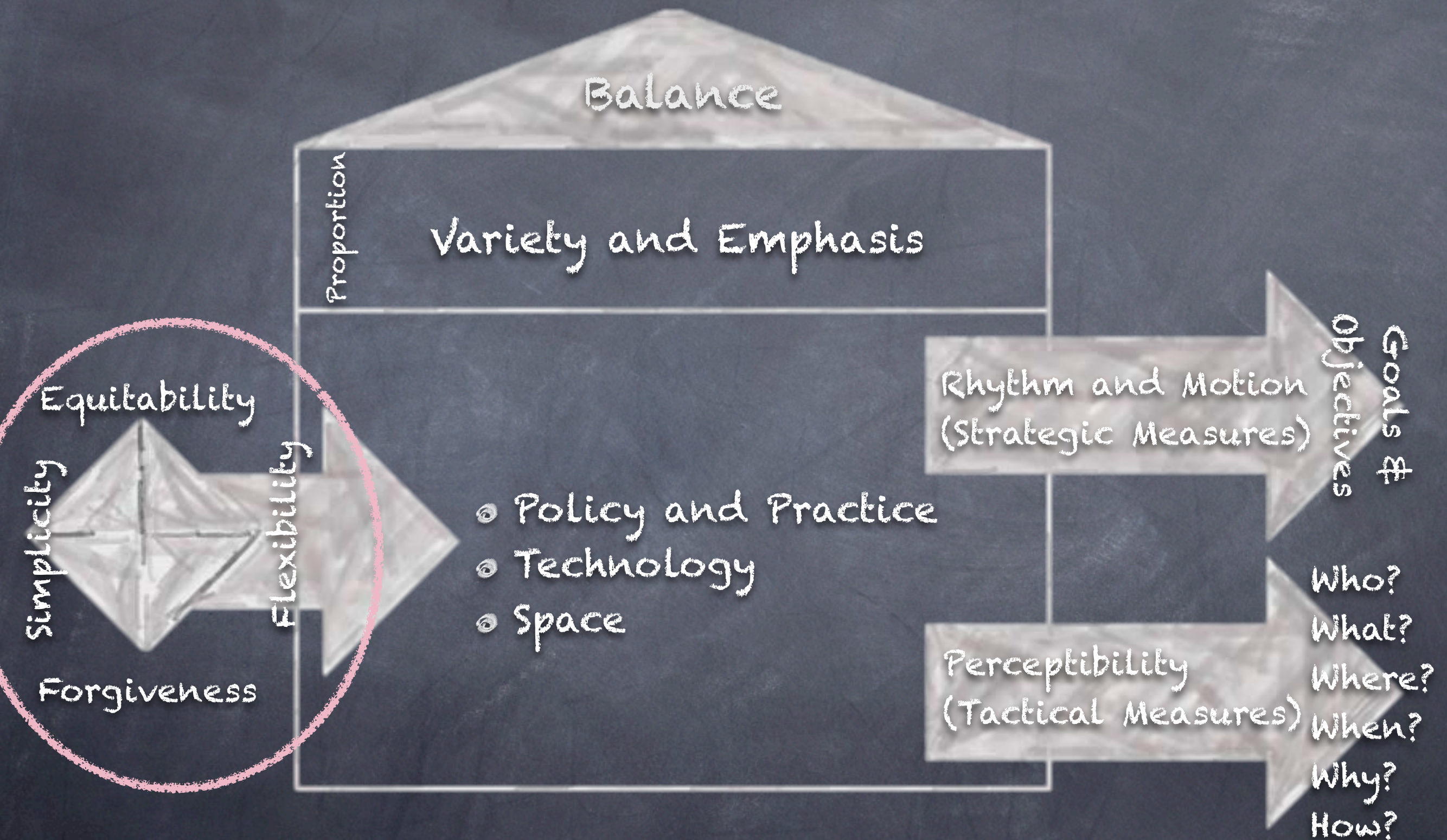


# 7 Tips for Designing a Great Agenda



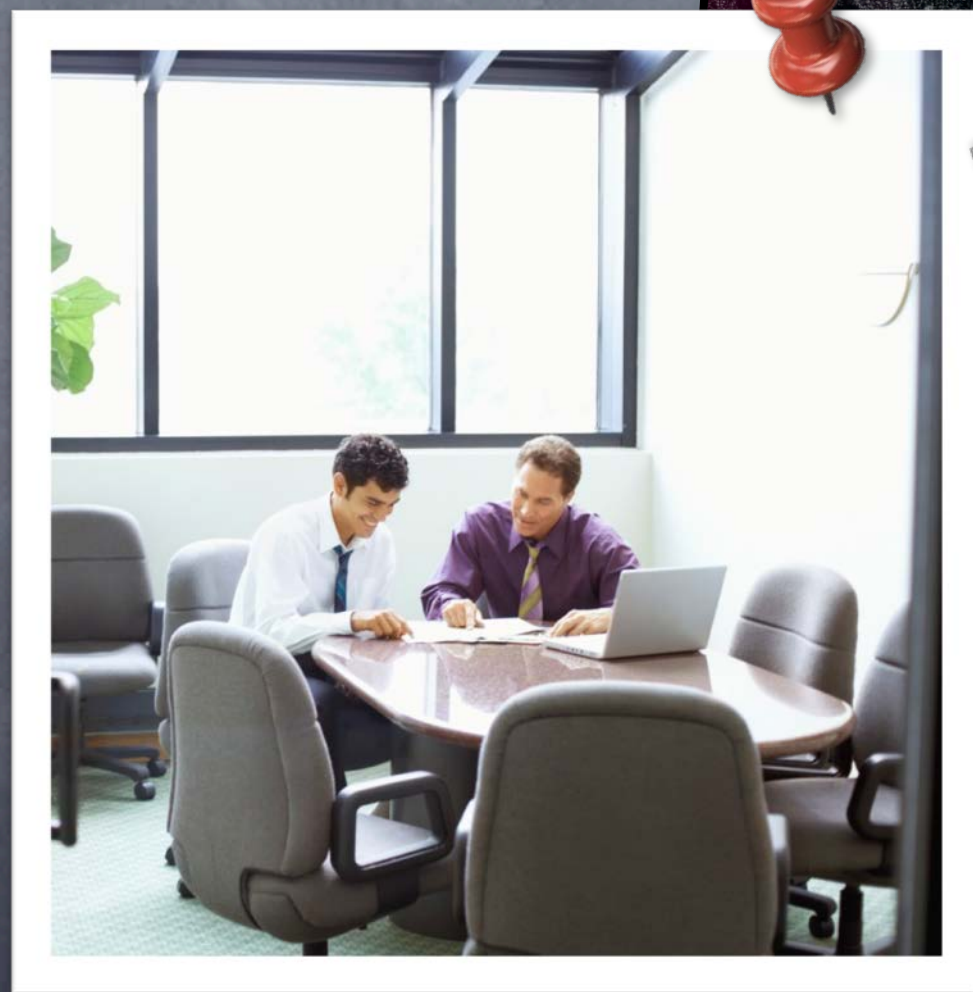
1. Seek balance in agenda design to ensure that organization and attendee needs are met.
2. Ensure that all material is posted to the repository prior to the meeting.
3. Specify the location for the meeting, and various technologies that will be used (links to online meetings, dial-in numbers, etc. should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







Space





# Space

## FLEXIBILITY

- EXPANDING AND CONTRACTING
- FROM TABLES TO OPEN SPACES
- HALLWAYS AND STORAGE
- EQUIPMENT

## SIMPLICITY

- CLUTTER
- ENOUGH ROOM, BUT NOT TOO MUCH ROOM

## EQUITABILITY

- CHAIR AND TABLE HEIGHT AND WIDTH
- ROOM TO MOVE

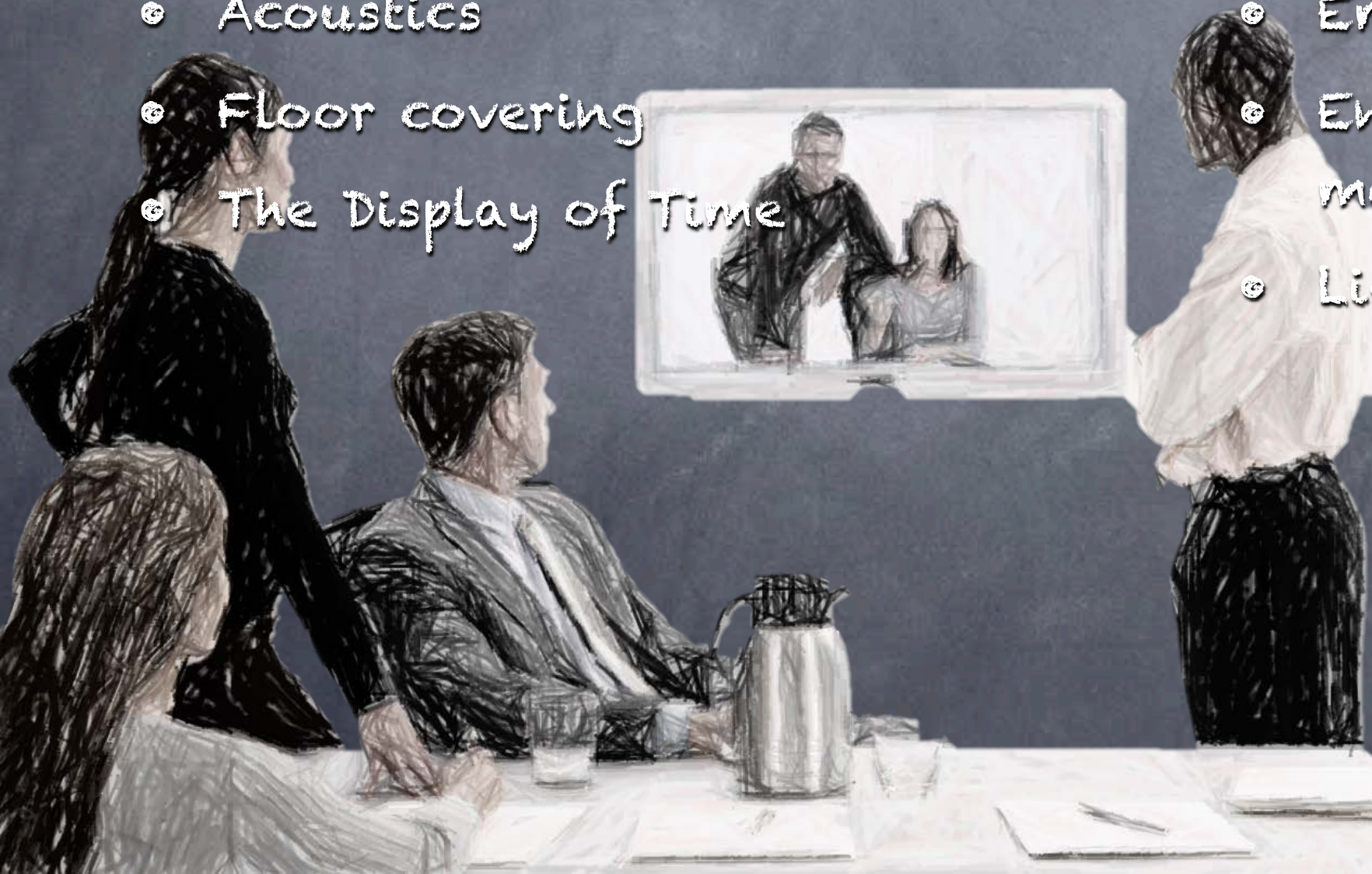
## FORGIVENESS

- SPILLS AND OTHER MESSSES
- RETURNING THE ROOM TO THE WAY YOU FOUND IT, OR BETTER



# Meeting Space

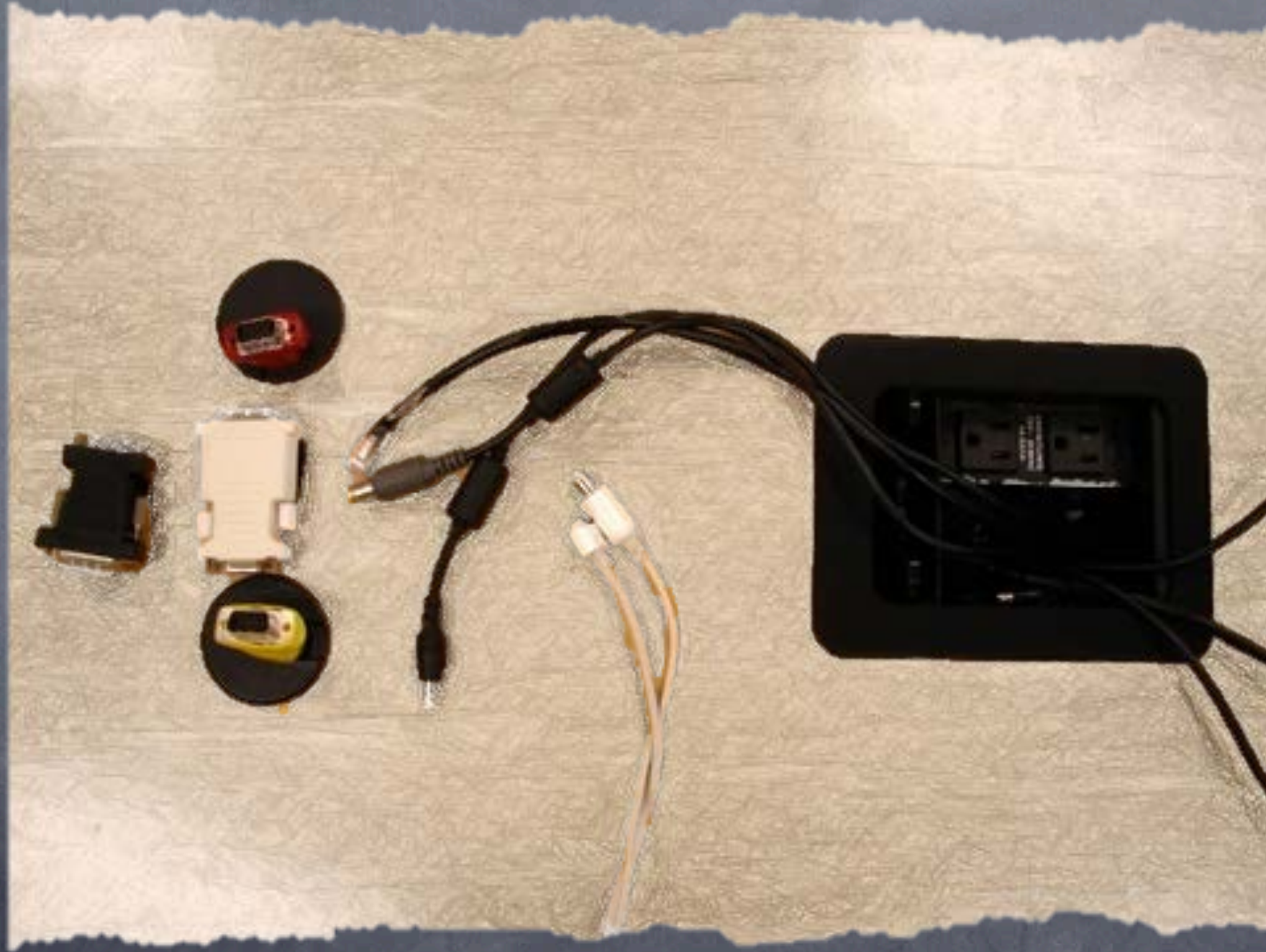
- Natural Light
- Exposure
- Heating & cooling
- Acoustics
- Floor covering
- The Display of Time
- Use of room - Catering
- Energy model
- Structural impediments
- Emergency
- Entry and exit and movement
- Light control





# Technology Simplicity?

Equitability  
Simplicity  
Flexibility  
Forgiveness







# Technology Simplicity?









# GoToMeeting + Podio

 **26 Comments**

 **1 Viewing**

**4 Following**

**Daniel W. Rasmus** 2 months ago  
Can you get back to me about the webinar? Need to work dates and content. Thanks!

**Katelyn deDiego** 2 months ago  
Hey @Daniel W. Rasmus, you want to speak with @Veronica Puailoa about the webinar. She handles those events for GoToMeeting. I handle content (papers/videos).

My team uses GoToMeeting to meet face to face online. We use Podio to chat with each other and external partners and to keep

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# Collaboration, before, during and after the meeting

## PODIO

- Internal and external collaboration from any device



## GoToMeeting

- Face to face online meetings from anywhere



## ShareFile

- Secure and large file sharing and syncing from any device



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# Technology

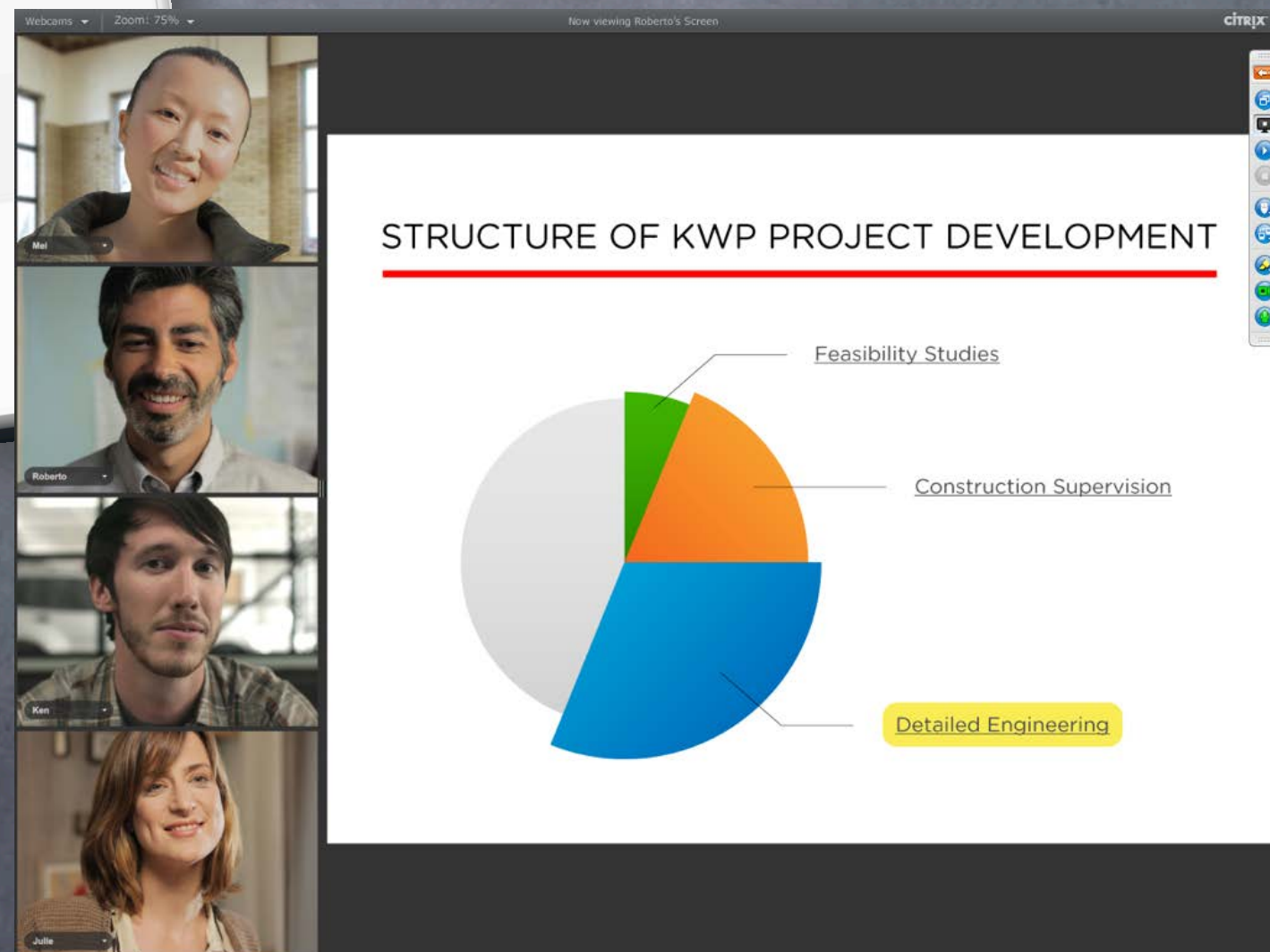
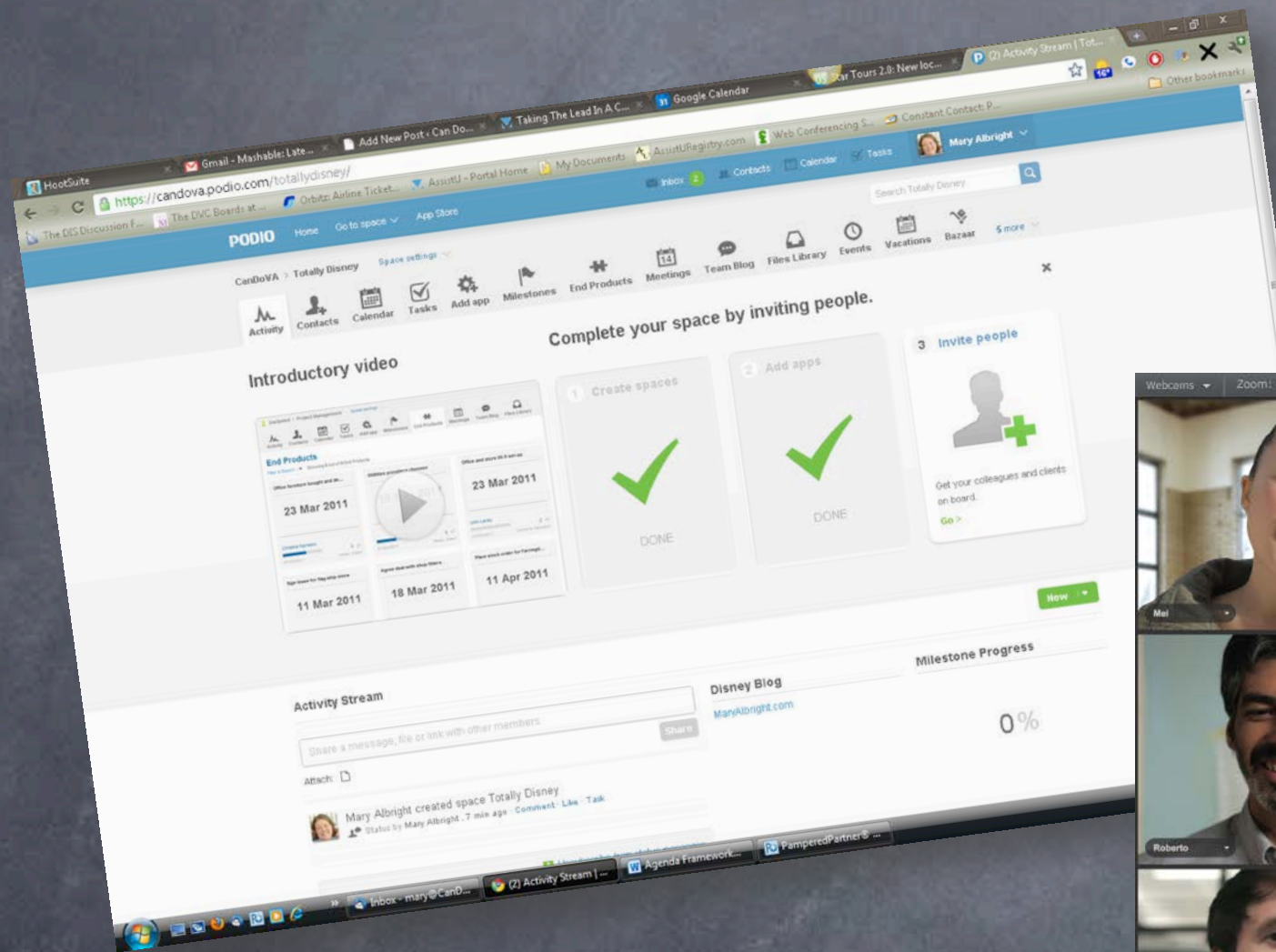
## The Software Experience

Simplicity

Equitability

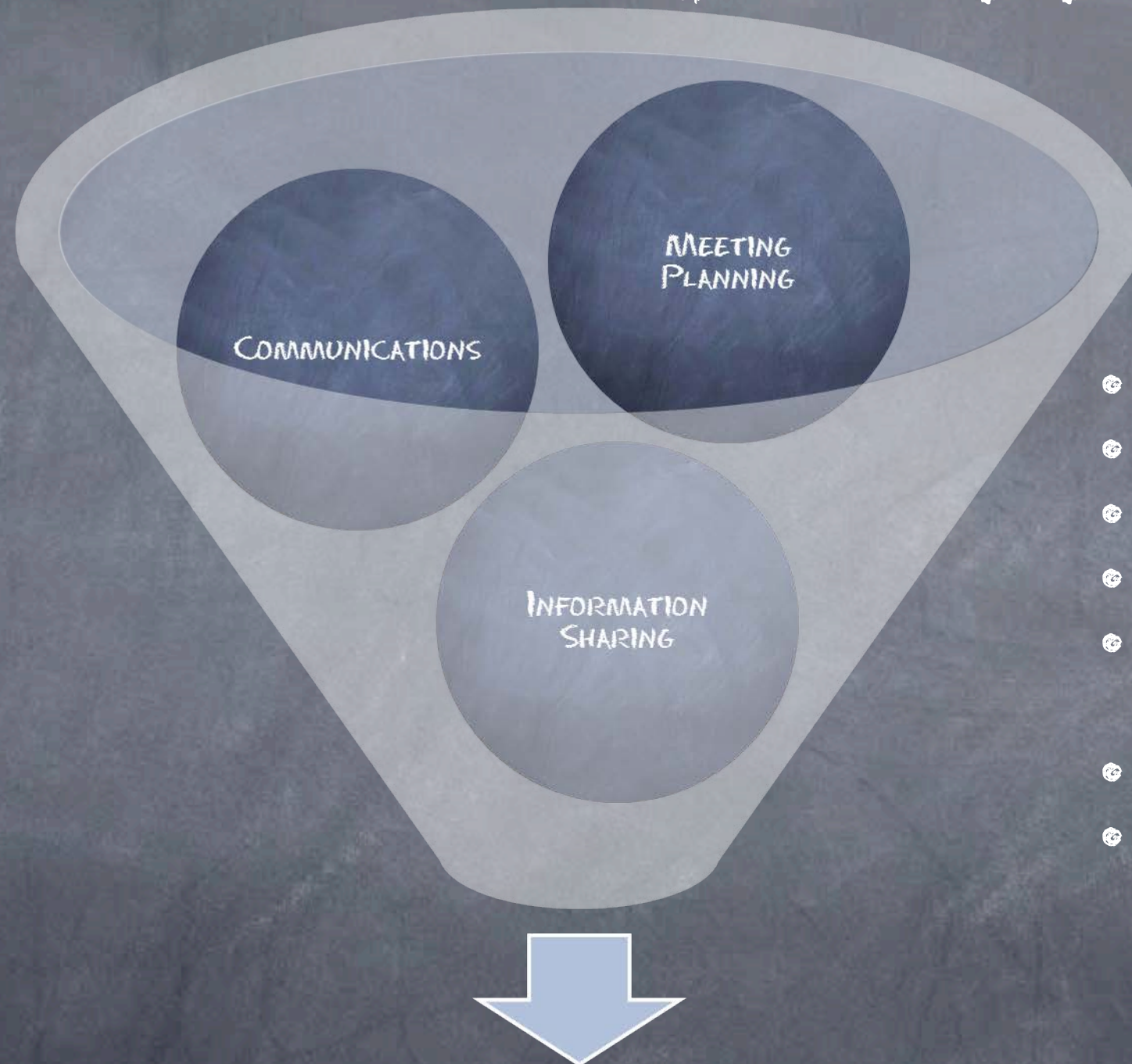
Flexibility

Forgiveness





# Technology Support



FACILITATION SUPPORT

- Brainstorming
- Voting
- Prioritizing
- Categorizing
- Meeting Evaluation and Feedback
- Workflow
- Sharing
  - ▶ Repository
  - ▶ Back Channel
  - ▶ Virtual Attendees



# Policy & Practice Flexibility



New People

New Leadership

New Practice

New Technology



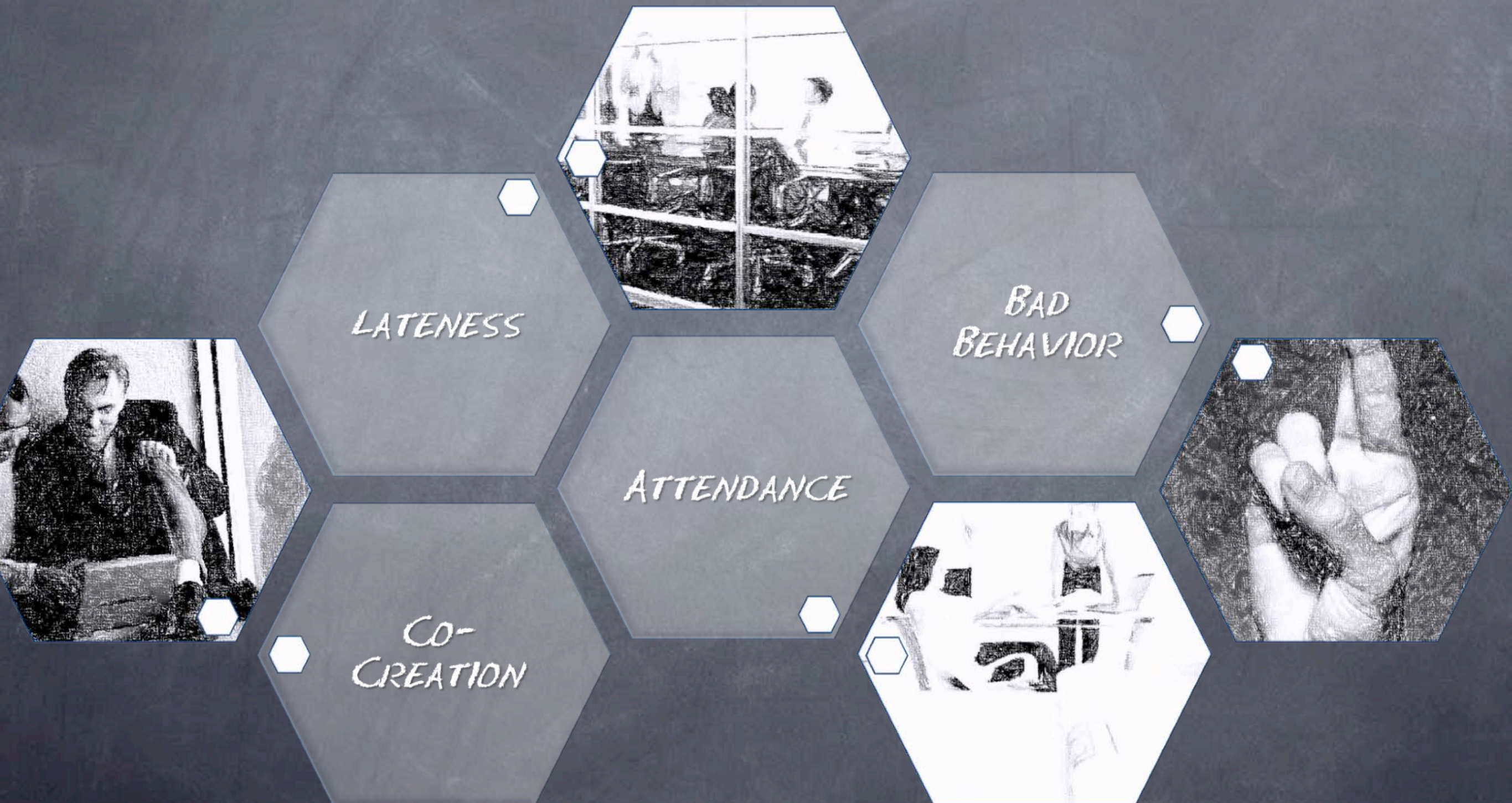
# Policy & Practice Equitability





# Policy & Practice

## Forgiveness





# TACTICAL

# Perceptibility

Who?

Who is the team? Who are the stakeholders? Who can make decisions? Who is responsible for action items?

What?

What are the mission and charter of the team? What are its short-term, long-term goals? What action items come out of a meeting?

Where?

Where should we expect to meet? Where are our results expected to manifest themselves?

When?

When are meetings scheduled to be held? When are we expected to complete our work? Over what period of time? What agreements are implicit when it comes to schedule?

Why?

Why is this team meeting to achieve these goals? How does this meeting fit into the organizational strategy? Why this team and not some other team? Is there another team with a complementary charter? Why not combine the teams?

How?

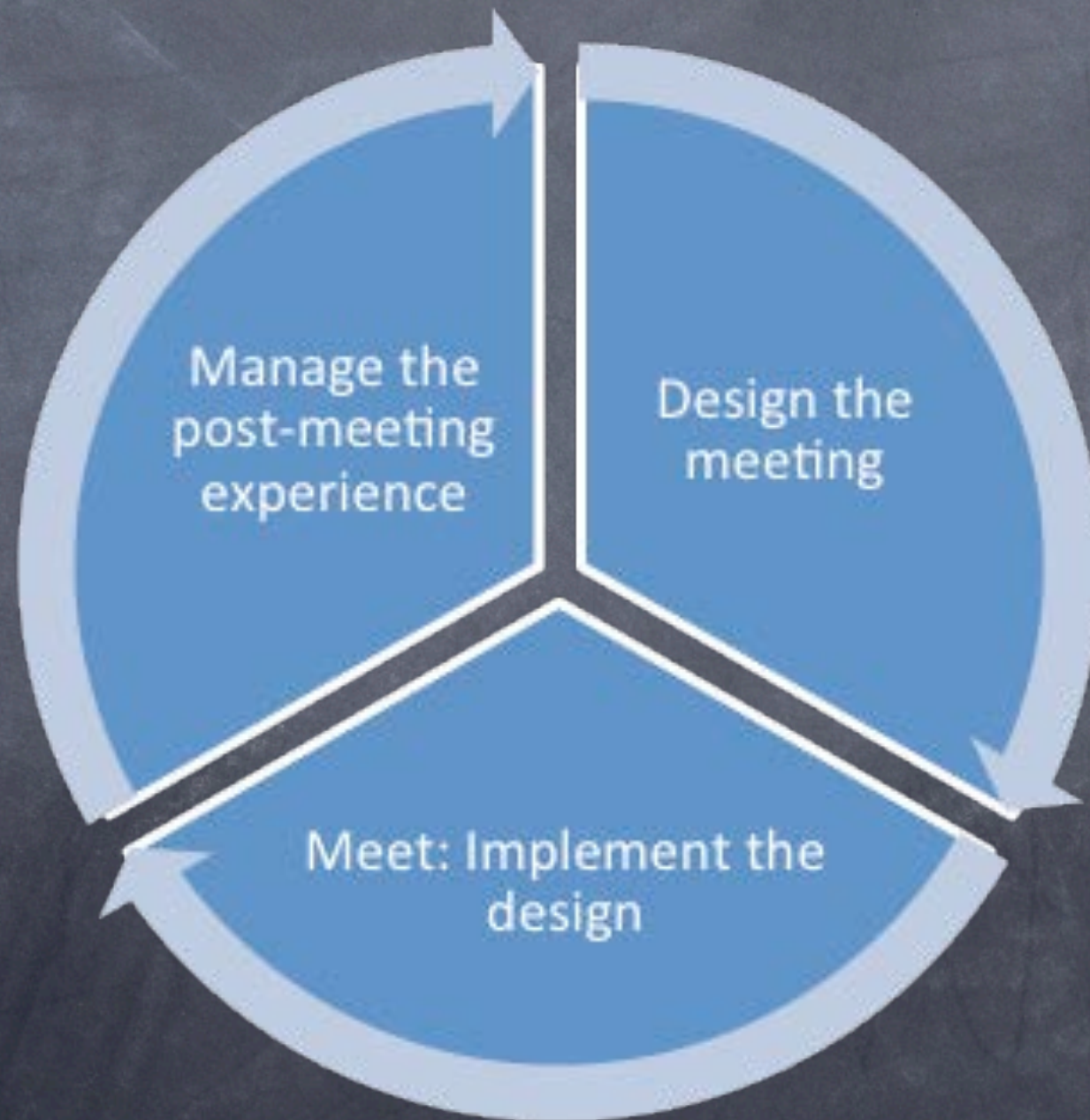
How will this team work? What are our practices and methods?

Reporting?

How will the results of the meeting be reported to the attendees? To those who missed the meeting? To stakeholders? The larger organization? Where can I find the information? What Repository? What form does it take?  
How do I Read it?



# Meeting Design Cycle





# Design a Great Post-Meeting Experience

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



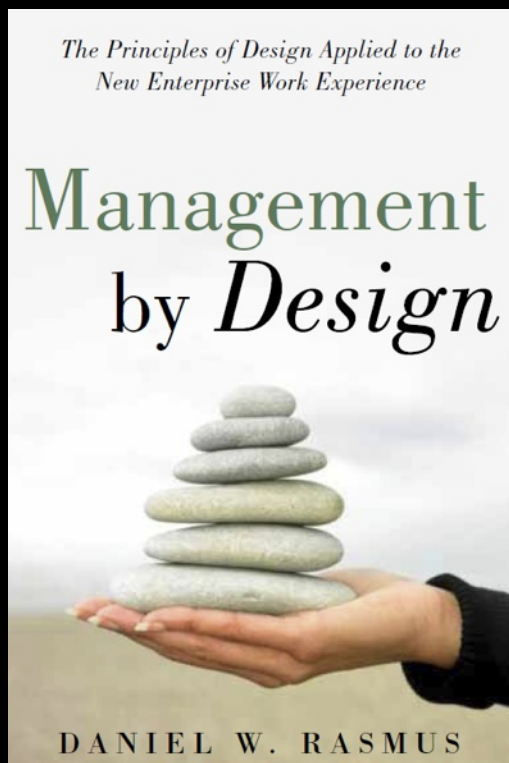


See you  
all in the  
next  
meeting.





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# Q & A



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**James Hilliard**

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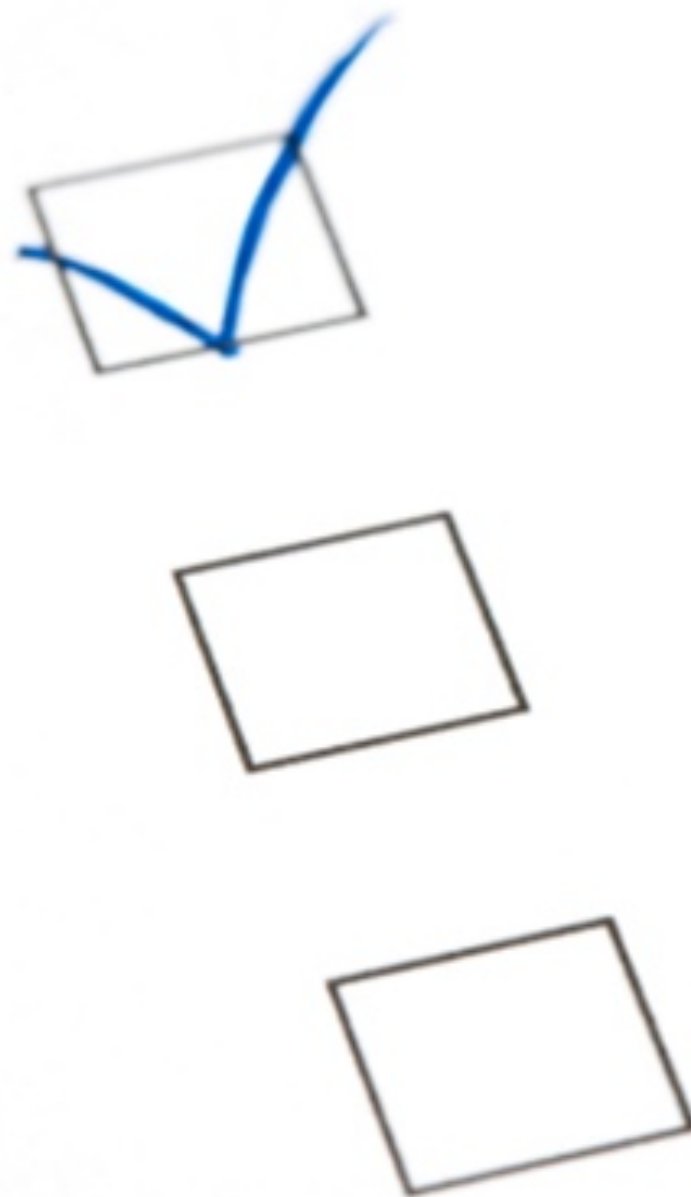
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# How'd we do?

Fill out the survey that opens *after* you leave the webinar





Thank You!



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**Work better. Live better.**