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The Effective Meeting

By Tom Marx

I recently read an article in another eZine that caught my attention. The title was "The NEW ROI: Too Tough to Tackle?"* The article spoke about an ROI measurement methodology for meetings that was developed by Jack Phillips, PhD, founder of the ROI Institute, Birmingham, Alabama. The methodology is being introduced to enterprises and in the words of the author of the eZine article, "It's complex."

If you have a large staff and a budget devoted to proving the investment return on your meetings, this might be a worthwhile exercise. The promise that meetings will be effective and results-oriented is attractive. However, for most companies, employing a complex methodology for proving ROI for each meeting would likely be a laborious process. The complexity might be off-putting for most managers. Why make things so difficult?

Our goal here is to offer a simpler perspective. We call this our "Meetings Effectiveness Audit."

Step One – Make Assessments
Most of the complaints we hear about meetings include:

- They take too long
- Little is accomplished
- They're stressful
- They never start or end on time
- No one is leading
- Reports are late
- Nothing changes

We believe in making grounded assessments before leaping into action, so first find out if you even have a problem with your meetings. Create a brief survey that can be conducted over a short period of time (perhaps 30 days).

Here are a few simple questions you can use:

1. What was your perception of the meeting? How did others react?
2. What did you learn? How did your perceptions change?
3. How will you apply what you learned to your job?
4. How will the implementation affect the organization?

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5. What is the monetary value of the impact?
6. What are the intangible benefits?

Hand this survey out before the end of each meeting and have people complete the survey BEFORE they leave the room. Allow no more than 5 minutes and require handing in the survey as their exit visa. Tell people to keep it brief and keep it honest. All responses will be confidential, so no need to put their names on it.

Step Two – Recommend Improvements
Tabulate the surveys as they are handed in and watch for trends. Design the key points that can be used to improve meeting results. Create a report on what people said and then publish the results and the recommendations company-wide.

This would be a good opportunity to introduce a training process for meetings. Key managers or meeting facilitators could participate and enter into study groups to share ideas on how to best implement the recommendations. Someone will need to take the lead – depending on the size of your organization, perhaps someone from HR or even the president or owner.

Step Three – Towards Better Meeting Management
Now that you have identified the weak and strong points about your company's meeting process, and announced the changes to be made, you will start to see improvements. As we evolved in our own meeting effectiveness, one tool of meeting refinement was given to us by a colleague, Paul Cooperstein (http://www.businessmomentum.org/). It's basically a set of guidelines for running a good meeting. We have a sign on our conference room wall (and so do many of our clients), which simply says:

Meeting Guidelines

1. **Purpose**
2. **Leader**
3. **Objectives**
4. **Timeline**
5. **Scribe**
6. **Outline results, decisions, and actions**
7. **Parking Lot**

Here's how this works:

- Purpose: To keep the meeting on track, declare the purpose of the meeting at the start. For example: "Decide on press releases and media strategy for the next quarter."
- Leader: Declare the leader and grant them authority to lead.
- Objectives: State the desired goals and objectives of the meeting up front to ensure buy-in by all attendees.
- Timeline: Declare start time and stop time and keep to the timeline.
- Scribe: The leader should not be the person who completes the written report, so choose someone to scribe the meeting and submit the report to all attendees.
- Outline results, decisions, and actions: Email within 24 hours of the end of the meeting BRIEF results, decisions and actions. For any action, there must be a name and "by when" included.

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- Parking Lot: this is the place to temporarily track those important ideas, tasks and activities that always come up during the meeting, but are outside the scope of what's being presently discussed. If there's time, the items in the Parking Lot can be returned to and resolved or can be scheduled for when they will be resolved. These items should also be included in the meeting report, along with who is responsible and, again, "by when."

Step Four – Reap the Results
We've found that by following these guidelines and having monthly or quarterly check-ins, our meetings are productive, efficient, and effective – and dare we say even fun! Let us know what you've found to be effective ways to conduct meetings.

*"The NEW ROI: Too Tough to Tackle?" *Article by Dave Kovaleski and published by MeetingsNet – (www.meetingsnet.com)*

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