Structuring and Participating in Effective Meetings
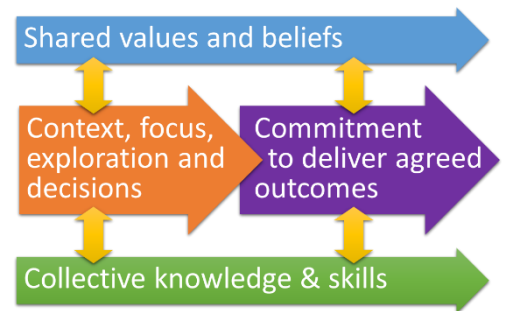## ... Basic tips for ensuring meeting success

Why effective meetings?

If you are an organisation or individual seeking to create an effective future, the key medium you have to effect this is in how you meet with others. Meetings are the primary mechanism by which we: generate enthusiasm, inspire creativity, build ownership, engage diversity, reinforce culture, nurture teamwork, grow people, sell ideas, develop solutions, and effect a whole other bunch of valuable outcomes – loyalty, confidence, trust, vision to name a few.

They are also the primary mechanism by which we do the total opposite.

Effective meetings are about maximising positive value of meetings described above through efficiently (and recognisably) using participants' time to add that value to themselves, to their work, and/or to others. Effective meetings are ones in which the yellow arrows in the diagram on the right actively strengthen and grow the other arrows.

Shared values and beliefs

Context, focus, exploration and decisions

Commitment to deliver agreed outcomes

Collective knowledge & skills

But what makes meetings effective?

What makes a meeting effective?

A clear objective and a good agenda to deliver that objective are certainly key. But what of the approach taken to delivering the agenda, and of the attitudes that people bring to the meeting? How do they impact effectiveness, and is one of these, the approach or the attitudes, more important than the other?

Analysis shows us that the design of the meeting is important, but how people participate is twice as important. However, the two things are closely related, and it is when good structure comes together with good participation that meetings can be truly effective - even transformational.

For this to work, the structure needs to provide what is necessary for good participation, and the participation needs to fully exploit the opportunities and value of the structure - the two need to work hand in hand. So, what does that look like in practice?

The framework on the following page provides two useful checklists to identify responsibilities for each and how they work together. It is followed by a deeper explanation outlining further ideas and resources which can be used to maximise the benefits – beginning with what that means in terms of participation. Finally this guide goes on to look at the role of what happens before and after the meeting in ensuring that meetings are effective.

It is written as a straightforward guide to ensure that meetings are structured effectively, and that participants take full ownership of their impact on the 'conversation' that is happening through that structure.

	Structure: Create the time, space and resources to best enable the following:	**Participation**: Use the following as a set of personal groundrules:
1	**Arrival** - providing a space for people to ready themselves; shelve their baggage and be totally present as their best selves	**Arrive** - ready yourself to be present at your best
2	**Alignment** - explicitly engaging people in the why, what and how of the meeting; making it real and relevant to their 'heart'	**Align** - commit to an agreed intent and approach
3	**Activity** - create participative processes to support curiosity, compassion & courage; use movement and multi-channel tools	**Aid** - use input to support progress in each other
4	**Attention** - facilitate attitudes of curiosity, compassion & courage; remain alert and agile to adjusting yourself and the process	**Attend** - nurture your curiosity and actively listen
5	**Actions** - clarify the outcomes and how they are to be enacted; explicitly address issues of uncertainty and lack of confidence	**Act** - determine to do! Commit and diarise actions
6	**Assessment** - track the perceived value of every meeting; use it to drive insights which improve the process and the people	**Assess** - how things were done and your part in that

Resources are available to support the above framework; links to these can be found in the 'Organiser' section (p5).

Adopting Best Practice as a Participant …

Arrive - ready yourself to be present at your best

You have probably heard the phrase 'bring your "A game"'. It reflects the idea that we can turn up in different states of preparedness and intention, and that this affects the outcomes.
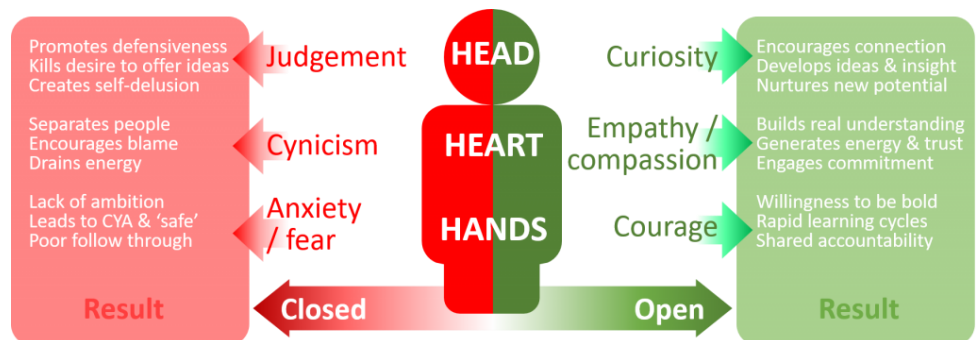
Showing up as the best version of yourself takes time and focus, and is not really possible when you are rushing from one thing to another with a lot on your mind. It is therefore essential that we make time before the meeting to complete any preparation required. We are not talking *here* about the actions, pre-reading, and pre-work that should be done well before the meeting *(we have saved that for Page 9)*. This is about taking a few minutes immediately before the meeting to marshal and manage your thoughts and emotions, and to ready yourself to engage 100% with the opportunities to add value that the meeting presents.

Part of this readiness involves what is known as 'monitoring your inner condition' - which version of 'you' (see the diagram above) are you bringing to the meeting? When we are under pressure, it is all too easy to lapse into a cynical, judgmental reaction to what is said and seen, but this slows everything down and creates a barrier to the engagement, creativity and diversity of others. However, all too often we are not fully aware that we are in this condition and do not recognise the impact we are having.

A couple of minutes of quiet time enables us to take our attention inside of ourselves, quell the pressures (if only for a short while) and deliberately decide to respond with curiosity and compassion. It gives us the space to centre ourselves - to reconnect with our identity in all that is going on around us. Some people use the time for prayer - to give them the perspective and humility they are seeking - but you can use whatever works for you.

Align - commit to an agreed intent and approach

The product of an effective meeting leaves the room in the insights, understanding, attitudes and commitments of the people who attended it - the paperwork only serves as a record and reminder to support that (see Scale of Commitment). Meetings which have no impact on what people think, do, or feel have very limited benefit. It is therefore really important that you can see the value of the meeting in terms of its potential to influence what people think, do, or feel, and to recognise your role as either a contributor or a recipient (or both) within that.

The objectives and agenda of the meeting should enable you to see that potential in advance of the meeting. But if they do not (either because you cannot see the value, or because they are not communicated) it is important that you take responsibility to address this with the organiser - either to absent yourself, or to understand how best to prepare and be present. The effectiveness of a meeting depends on a clear picture of the intended outcomes, and participants who are best prepared to deliver them.

When the objectives and the agenda are clear, take time at the start of the meeting to remind yourself of what you can best do to help deliver them. Take time also to broaden your thinking on their potential and how that might impact: you; your values; your work; the product/service; the team; their attitudes and development; the organisation; the community; the vision; and beyond.

Make the value connections that will more fully engage you in the discussions and enable you to maximise the opportunities for the outcomes to add value to the things you care about, and then determine to be fully supportive of being the best that you can be, in enabling the meeting to be the best that it can be.

Aid - use input to support progress in each other

It is not always possible to understand the things that are most likely to help us grow when we first encounter them - it is often the need for change that makes the steps to change seem alien, and this is an increasingly prevalent reality in our VUCA World and the flexibility it requires of our thoughts and attitudes.

But, as Einstein observed: The day we stop learning is the day we start dying. We cannot afford to stay the same and, if we try to, whatever role we have will be taken by someone more able to adapt it to its evolving purpose and opportunities. The World is now changing so fast we need to bring all of ourselves to keep up with it.

Within meetings, this means that we are increasingly likely to encounter mechanisms of conversation and decision making which engage more than just single voices heard around a table. We will regularly find ourselves in situations where our movements, our gestures, our actions all contribute (alongside our words) in highly participative, multi-channel explorations of possibilities and optimising conclusions - whether that is by means of a simple affinity diagram, or something newer or more advanced.

Engaging fully in what these mechanisms require of us may initially seem alien to us - more like what we remember as play than what we have come to know as work. But play often accesses more of who we are in ways that are

easier to reconcile with those around us, and by maintaining a fully open attitude (curious, compassionate, and even courageous at times) in ourselves, and encouraging the same in others, we will discover value and insight at a greater rate than we previously thought possible.

Whatever mechanisms are adopted, traditional or new, keep open, and wherever possible use your inputs to support progress in the meeting and in each other.

Attend - nurture your curiosity and actively listen

Attend is not intended in the sense of simply turning up, but more in the sense of listening and 'paying attention'.

Listening is a skill, and as such there is far more to it than simply 'hearing'. It is about processing how all of our senses (physical and emotional) are responding to what is being said, how it is being said, and what is happening around it. And it is about the engagement of our thoughts, our emotions, our creativity, our spirit in the processing of those senses. At its best, it is an intense work which drives insight and ideas at an amazing rate.

Otto Scharmer, the author of the diagram on the previous page, describes four levels of such 'paying attention' (see the table on the right).

Level 1 Downloading *(fixed)*	Hearing through a filter of 'habitual' judgement based on current perceptions
Level 2 Reflection *(flexing)*	Reinterpreting our mental constructs to best adapt to what we are hearing
Level 3 Imagination *(freeing)*	Living the reality of what is being said and sensing its meaning from within
Level 4 Presencing *(forming)*	Letting go of ourselves and sensing the potential of emerging possibilities

It should be noted that the higher order choices do not commit the listener to actually adopt what they are hearing, but they do place the listener in a far better position to understand the potential and implications of what is being 'said' before arriving at a conclusion. The result of this can be seen in the tendency of the listener to ask questions which explore potential and new insight, whereas listening at lower levels tends to result more in observations, objections or alternatives (even if some of these are voiced as questions).

Act - determine to do! commit and diarise actions

40% of meeting is spent simply in order to progress actions which might otherwise be overlooked or delayed. This is potentially the greatest source of meeting inefficiency, but is so endemic that it is almost seen as inevitable, and meetings which do this well are seen as a good thing (even if the problem still persists afterward).

The problem with this mindset is that it actually encourages deception. People know that the actions are likely to be under-resourced and overrun, but they collude in a false hope in order to defer that problem and move on to more immediate issues (which are often the result of flawed actions from previous meetings).

To illustrate this behaviour, one consulting organisation undertook a survey of failed and delayed projects and asked the following question of the teams: Back when you defined this plan, if you took the time to pause and think about it, how many of you would have bet £500 of your own money on its success? The answer was none of them.

The £500 bet is a good discipline for us all to apply to the actions we take on. Thinking we have our own money riding on it causes us to take responsibility at a deeper level, to ensure it is planned in to our schedules, and to put the checks in place to ensure it is delivered. If (for whatever reasons) we are not willing to bet, we should not be

willing to commit. And if the meeting at least is aware of the problem it can take time to understand the reasoning (resourcing, tools, skills, conflict, whatever) and plan to do something about it.

Assess - how things were done and your part in that

No meeting is perfect. No participation lives up to its full potential. And the acceptance of these basic truths is key to having a healthy, enjoyable and fulfilling learning experience.

> *"When we stop learning we start dying."*
>
> Albert Einstein

There is always something we can do better, and it is important that we appreciate that this fact is not a judgement or evaluation of us as inferior, not is it a demand or expectation which obliges us to be different, but the recognition that we (and our events) still have untapped potential which we can access when we feel it is right to do so - at a time and place of our own choosing. This last point is crucial. We are good people. We have value that is beyond what we do and is not conditional on our choices. In the right circumstances we will choose to learn because we are all made that way. But it is **our** choice.

If we fail to fully appreciate that it is the individual's choice, we will find it difficult to be honest about the potential that remains, fearing that simply recognising its existence will obligate us to act upon it. As a result we will not be fully objective in identifying further potential and learning will cease to be a choice for us - our identity will become caught up in a 'standard' which we maintain through denying the potential to move beyond it.

When we can voice possibilities without feeling them as an accountability, then we will have become true learners, but we get there by ensuring we identify the possibilities and working through the personal stuff, not by denying the possibilities in order to avoid the personal stuff.

No matter how good the meeting was (and that good should definitely be celebrated) a good assessment should always identify things that COULD be improved, if only to provide the option.

If feedback tools are available, use them to provide an objective honest picture of how things went against your expectation of value, but from a perspective that you (and other things) were part of that, not from the perspective of evaluating another person. And if the feedback reflects a value gap, ensure you leave a comment which helps the recipient to understand the potential for you that is as yet untapped, but which humbly accepts that it is not their responsibility to do anything about it. See the guide or the video on providing and receiving feedback.

Enabling Best Practice as an Organiser ...

Arrival

Paradoxically, one of the most productive things you plan for a meeting is to do nothing - just for a few minutes at the start. People often arrive at meetings with a lot of other things going on in their heads as they process all of the other demands upon them: problems; deadlines; emerging concerns etc. - in other words, they may be in the meeting physically (or virtually), but their minds and emotions are all over the place.

By planning a minute or two of silence, you give time and space for them to become fully aware of what is going on with their attention, and to make an intention to put that to one side and to focus on the needs of the meeting and their colleagues within the meeting.

Initially, this may feel very alien to them, so it will need a few words of explanation, but by being clear on what you are expecting them to do, and making it a regular part of each of your meetings, you will find that your meetings start better and more coherently. For more information, see managing arrival.

For a selection of resources which support 'arrival', please go to: https://help.inspirometer.com/tag/arrival/

Alignment

While conflict within a meeting can be creative and productive, it can also be wasteful and damaging. A key factor within this lies in whether that conflict takes place within the context of some level of shared purpose - a common intent that can be explicitly used to harness the merits of each perspective into an agreed way forward.

Agreeing from the outset what a meeting is for is key to maximising the productivity of the thinking and discussion within it. People recognise that a lot of wasted time takes place within meetings, but without a clear purpose it is difficult for them to agree on which activities are generating that waste.

> "Having lost sight of our objective, we redoubled our efforts"
>
> Duke of Wellington

Good practice is to pre-circulate the objectives and agenda before the meeting - this gives people the opportunity to understand their part, and to effectively prepare themselves for that. However, as the Duke of Wellington's quote testifies, people still lose sight of the objective amidst the pressures that surround them.

Restating the objective at the start of the meeting gives people the opportunity to reconnect themselves with the purpose of the meeting, and to remind themselves of why this is important to them. Writing the objective up, and placing it in a visually prominent location provides an ongoing reminder of that purpose, and a useful tool for challenging whether the current activity is productively taking the meeting toward that objective.

For a selection of resources which support 'alignment', please go to: https://help.inspirometer.com/tag/alignment/

Activity

Most meetings consist of listening to presentations and discussions held around a table - which is a process that has remained largely unaltered for at least 2000 years. It is rooted in more hierachical and conservative approaches to dissemination and debate, which tend to be better at governance than engagement. And these approaches are so much part of our pattern, that they are often assumed and unquestioned - a paradigm of what it means to meet.

In part this is linguistic – while meetings are clearly an activity (meet is a verb) we tend to think of 'meeting' as a noun – when someone uses the term 'meeting' our minds eye is usually drawn to a picture of a group of people sat round a table discussing things.

 But many other means to exploration and decision making have been developed over the years - using multi-channel, multiple medium approaches which are much better suited to engaging participation and enabling insight and consensus to evolve. The Meetings Clinic lists almost 30 of these, and hundreds more exist, and yet they are largely overlooked in many meetings simply because the question "What is the best approach to do this?" is not asked - the paradigm of presentation and debate is not challenged.

If you are not yet familiar with using different activities to progress the objectives of your meetings, rest assured that it is not an all or nothing approach. You can start gently by including one or two to tackle specific aspects of the meeting. The Meetings Clinic has a wealth of resources to help you, but in the early stages the most useful of these is likely to be the tool selection matrix *(shown on the right)* which will help you to identify which tools are likely to be most useful for your specific need.

For further insight into the usefulness of tools and exercises, take a look at the clinic item on learning styles.

For a selection of resources which support 'activity', please go to: https://help.inspirometer.com/tag/activity/

Attention

The product of your meeting leaves the (virtual or physical) room in the understanding, attitudes and intentions of its attendees - this means that, for your meeting to add value, such understanding, those attitudes and/or those intentions need to change. Such change is significantly easier when people's attention is fully focused on the potential of what is evolving in the meeting - when their thinking is open: curious, compassionate and courageous (the 'green' side of the diagram on page 2).

The problem is, closed thinking (judgmental, cynical - the 'red' side of the diagram on page 2) when it occurs, tends to be contagious, and this closes down people's capacity and willingness to adopt the perspectives they need to develop to make progress. Their attention shifts from the potential of what is actually happening to focus almost exclusively on its risks to their concerns and their baggage.

There is therefore a need to keep things 'green', and while it is down to each individual to monitor their own internal condition, this becomes increasingly difficult for them as the conversation itself adopts a red bias. It is the organiser's role to keep track of this, and to flag this up to the group in a way that they can work together (and individually) to do something about it. There are some useful tools to help with identifying this shift, and putting things back to green.

For a selection of resources which support 'attention', please go to: https://help.inspirometer.com/tag/attention/

Actions

As previously stated the product of an effective meeting leaves the room in the changed attitudes, understanding and intentions of its attendees. And pursuing the intentions serves to reinforce the attitudes and understanding.

But it is the intentions that are often the most fragile - back in the real world they tend to evaporate in the heat of the day to day and can easily be forgotten if they are not written down. It is therefore vitally important to use the end of the meeting to embed them and secure them in a way that they do not disappear.

Ensure each intention is clearly defined: What is to be delivered (to what quality); by when; by whom. And ensure each person nominated as 'whom' personally accepts the responsibility and has the opportunity to state any reservations and flag up any support or resources required. If reservations are raised, ensure that adjustments are made to meet those reservations or to the action itself until there is clear confidence and commitment to delivery.

A useful mechanism to check confidence and commitment is the £500 bet. Asking people whether they would be willing to bet their own money on a successful outcome is a great way to surface reservations and issues.

If your meetings have a tradition of weak delivery of actions, plan more time for this part of the meeting and consider a pre-mortem exercise. And ensure everything is documented and circulated.

For a selection of resources which support 'action', please go to: https://help.inspirometer.com/tag/action/

Assessment

Two facts about the majority of meetings are: 1. They fall a long way short of being fully effective; and 2. The organiser is largely oblivious to fact 1. And these two facts are the primary reasons meetings have not improved - unlike virtually every other process they lack data on their performance.

The assessment step provides the means by which this issue is redressed.

Ensure anonymous sentiment metrics are used to track honest and open attendee perceptions of the value of your meetings, and use the results to:

- ■ Analyse what works and what doesn't, and fix any shortfalls
- ■ Experiment with the effectiveness of different meeting tools and approaches
- ■ Initiate dialogue and engage the attendees in improving meeting performance
- ■ Trend meeting improvement to increase all aspects of effectiveness and engagement

For guidance on how to use sentiment metrics in your meetings, see the guidance on using Inspirometer.

For a selection of resources which support 'action', please go to: https://help.inspirometer.com/tag/assessment/

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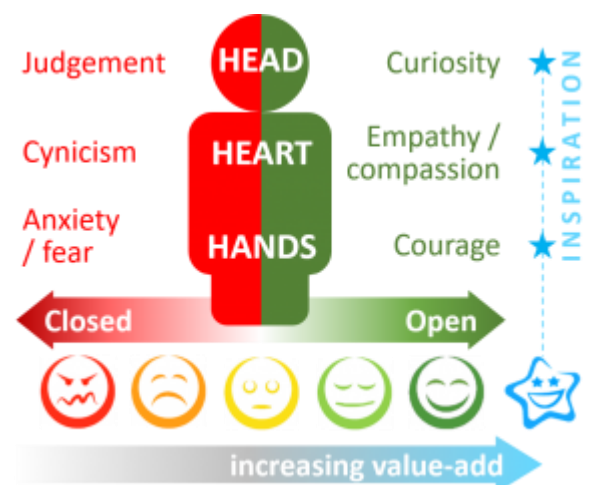
How good do we need to be?

The answer to this question is complicated. It is also largely irrelevant. A more important question is 'How good do you want to be?', since that is probably as good as you are going to get – people are much more likely to achieve and sustain their own goals than an arbitrary standard proposed by someone who does not know your situation.

However, 'How good do you want to be?' has an evolving answer, influenced by the potential for, and the benefits of, 'getting better'. And while we cannot answer the question 'How good do we need to be?' we can at least map out a picture of the territory most people pass through on their way to success.

Such a map serves three purposes:

- It can enable you to agree where you are starting out from;
- It can help you to identify, collectively, where you want to be; and
- It can clarify the steps you need to take to get there.

The following grid is such a map (albeit a somewhat simplified version – a more comprehensive version can be found here). It is called a maturity model, and it enables groups of people to discuss and agree, across different aspects of meeting effectiveness: Their start point; their goal; and their immediate focus for moving forward.

To use the maturity model, we would suggest you give copies to your team members/attendees, and have them mark individually in each row: Where they think the meetings currently are, and where they see as a practical goal to aim for. This can then be marked on a large chart, and discussion used to help to share perspectives (particularly in respect of practicality and benefits) and reach consensus. The group can then identify the priorities they want to begin working on, and each subsequent meeting can review progress against that.

Collaboration Culture Maturity Model (simplified)

The purpose of this maturity model is to enable small groups to identify their currently prevalent attitudes and approaches to collaboration, then to agree what they would like them to be in the future, and to set plans in place to bring about that change.

Level:	1. Self-interested	2. Siloed	3. Mobilised	4. Engaged	5. Co-creative
Arrival	Sorry, the last meeting overran. What's this one?	Just made it. Was there any pre-reading I should do?	I will refresh myself on the notes I made for this	I'm all prepared with time to refocus on what's ahead!	I am prepared, early & using silent time to 'centre' myself
Alignment	Collaboration often lacks an objective/agenda.	Objectives tend to lack clearly defined deliverables	Objectives define a tangible outcome, but may be static	Defined outcomes are specific to context & evolving needs	Objectives & agenda are always agreed in advance
Activity	Almost exclusively presentation & debate	Largely sedentary but with basic tools like brainstorming	Includes some tools using wallspace & moving around	Frequent use of range of best-practice tools & syndicates	Best-practice meeting tools utilised for all meetings
Attention	They are wrong - there is little point in listening	I'm listening for a gap or a flaw so that I can argue my point	I am trying to reconcile your logic with my own	I want to be able to see things through your eyes	I want to really understand what is on your heart & why
Actions	I try my best to avoid all actions from meetings	I take actions & complete them if I can find the time	I take actions & plan them into my schedule/calendar	I commit to, & would bet on, the delivery of all my actions	I take professional pride in ensuring delivery of actions
Assessment	We do not assess meeting effectiveness	We capture feedback on some meetings	We track meeting effectiveness using trend graphs	We analyse trends to improve meeting effectiveness	Everyone takes systematic responsibility for meetings

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Link to more comprehensive version: http://help.inspirometer.com/wp-content/uploads/CCMMv3.pdf

The role of what happens before and after …

All of the foregoing will help to ensure that your meetings are fully efficient and effective, but it will not happen by accident. The ability of people to adopt what is outlined in these pages will be affected by what happens in preparation for the meeting. And the ultimate effectiveness of the meeting in delivering that value back into the real world will depend on what people do after the meeting.

This final section takes a very brief look at what needs to take place before and after the meeting, if all of this advice is to be really productive in ensuring effective and efficient meetings for your organisation.

Before the meeting …

The things we covered in *'Creating a productive environment and process for …'* all require a degree of forethought and planning on the part of the **meeting organiser**:

- The form of the meeting needs to be understood: is it needed; what impact is required; does it need to be physical; can some of it be done off-line (prep/forums etc.); who needs to provide or receive value from it?
- The objective needs to be defined in a way that enables people to **align** with the intended value of the meeting – make it clear what that value is in terms of tangible deliverables and outcomes for people
- Progress on past **actions** (if any) needs to be understood - the findings may influence the objective or prework
- The agenda needs to be planned out to enable time for full participation in **arrival**, **activities**, **actions** etc. – try phrasing the agenda as a series of questions to be answered by the meeting
- Learning from past **assessment** needs to be considered and incorporated into the design of the meeting
- People need to be engaged with the objective and any pre-reading and preparation they need to do to make the meeting a success. Results of past actions and developments should be communicated efficiently as pre-reading
- Facilities need to be booked and set-up to maximise their positive impact on the meeting

Preparation takes time. But wasted and repeat time in meetings takes much more. 'Meeting' should only be used when their dedicated time and format adds more value than the alternatives. Furthemore, they should focus on those areas where they add the most value, and the other aspects should be deployed to less costly mechanisms such as 1-to-1s, on-line-forums (such as Slack or Trello), pre-reading, video, email etc.

There are also requirements of the **meeting attendee**:

- Ensure you understand the objectives and agenda of the meeting, and your role in it, before you commit to it
- If your role only applies to part of the meeting, agree part-time attendance and timings with the organiser
- Ensure you are fully prepared for your part in the meeting, and that you can efficiently add value
- If there is pre-reading or pre-action to be completed, schedule time for this a day or two before the meeting
- Prepare your inputs so that they deliver the key messages quickly, succinctly, in a way that is easily understood
- If inputs can be more efficiently delivered off-line, then do so, but in time for people to read them beforehand
- Ensure you plan to allow time to get to the meeting a bit early, to avoid delays, and to give you time to focus
- Revisit any participation feedback relevant to the meeting, and plan for how you will implement that learning

After the meeting …

One of the biggest causes of meeting inefficiency is lack of progress between meetings. People tend to be very careful about scheduling out the time to attend meetings, but far less diligent about ensuring they ring-fence the time needed to progress what emerges from the meeting. As a **meeting attendee**:

- Ensure meeting actions are planned into your calendar. It is easy to capture them as Tasks in most calendar software, but it is important that time is blocked out to ensure that the Tasks are completed on time.
- If the meeting was not an efficient use of your time, make that clear in the feedback to the meeting. Inefficient meetings are a vicious circle – taking more time; limiting time to prepare/action; leading to more inefficiency.
- Complete actions in sufficient time that the outcomes can be communicated and understood in plenty of time before the next meeting. Do not plan to consume meeting time to do this, because this is inefficient for others.

For the **meeting organiser** their key role post-meeting is to learn from what worked and what did not.

- Review the meeting feedback and adopt useful learning within it for application to future meetings.
- Circulate a summary of what was agreed in the meeting: actions, owners and timescales
- Follow up with people whose participation impacted meeting effectiveness either positively or negatively
- Address any areas where you have concerns about the actions being completed on time

How did we do?

**Please rate the usefulness of this guide to you
All it takes is one simple click ...**