Training & Executive Coaching on:
- *Making Meetings Work Better*
- *Demystifying the Rules of Order*
- *Building Better Decision Making Teams*

Published Books:
- *"101 Boardroom Problems & How to Solve Them"*
- *"The Guide to Better Meetings – NPO Directors"*
- *"Mina's Guide to Minute Taking"*

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"We've Got to Stop Meeting Like This"

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1. GOALS OF SHARED DECISION MAKING

The overall goal of shared decision-making is to achieve **good decisions**, to achieve them **together**, and to do so within a **reasonable amount of time**.

<u>Substantively</u>, a collective decision should be:
- Strategically-driven: The decision advances the group's established mandate.
- Balanced and objective: The decision balances as many legitimate needs as possible.
- Informed: Professional expertise and input from stakeholders are taken into account.
- Realistic, affordable, enforceable, sustainable, legal.
- Smart and creative.

<u>Process-wise</u>, a decision-making process should be:
- Inclusive: Members are engaged in the process as active partners.
- Efficient: The decision is reached within a reasonable amount of time.
- Measured and gradual: Sufficient time is allocated to examining proposals.

Team Dysfunctions

1. A rush
2. No preparation
3. Short tempers
4. Interruptions
5. Last minute agenda items
6. Pre-determined outcomes
7. A slow and long meeting
8. Late start & late arrivals
9. Absence of key members
10. Threats and bullying
11. Use of computers and cell phones
12. Hesitancy and indecision

2. A VISION OF A SUCCESSFUL MEETING

A meeting is a gathering to discuss business and reach decisions jointly. The following ten ingredients characterize an effective meeting:

- **Clarity** of mandate, purpose, issues, and process.

- **Participation protocol and etiquette:** Only one person speaks at a time. Interruptions (verbal or non-verbal) are kept to the necessary minimum. A courteous, civilized and respectful tone is maintained. Discussions are focused on issues, not personalities.

- **Productivity and forward movement:** Discussion progresses along a pre-defined agenda, in an efficient and timely manner.

- **Flexibility and room for creative thinking:** Meeting structures (agendas and rules) are used in a flexible manner, to accommodate and promote creativity and open discussion rather than stifle them.

- **Quality:** Informed and in-depth discussions take place, leading to meaningful outcomes and thoughtful decisions.

- **Balance and inclusion:** All members are given an equal opportunity to participate. Dominated discussions are avoided.

- **Openness and Collaboration:** Members listen to one another and work together towards a common goal; Members are open to changing their views based on the discussion; Debates are hard on issues, but soft on people.

- **Shared responsibility:** Everyone (and not only the leader) takes responsibility for the success of the process; Finger pointing is minimized; Promises are kept and assigned tasks are completed.

- **Variety and a light touch:** The meeting's pace and activities are varied, to make it more engaging, interesting, and enticing to attend. A light touch is introduced when appropriate: "Take yourself lightly and your work seriously".

- **Logistical support:** Logistical details are managed proactively and professionally, to allow for an optimal use of time at the meeting.

3. MEMBER'S ROLES

The success of a meeting depends not only on the leader, but also on every member.

<u>Between meetings</u>, members can contribute by:

- Completing tasks that were assigned to them;
- Reviewing documents relevant to the meeting;
- Introducing agenda items, as needed;
- Raising concerns and helping to resolve potential problems;
- Offering assistance to the leader and other team members;
- Offering feedback to the leader on facilitation style.

<u>During meetings</u>, participants can contribute by:

- Speaking up and offering insights and ideas;
- Raising valid concerns, at the risk of being "unpopular";
- Listening to others with an open mind;
- Helping to create room for others to speak;
- Avoiding personal attacks and shouting matches;
- Complimenting others on a job well done.

Examples of scripts for participants:

- "Can we please get back to the agenda?";
- "Are we ready to make a decision yet?";
- "Can we hear from only one person at a time?";
- "Can we allow people to finish what they're saying?";
- "I am having trouble hearing from here. Can people speak louder?";
- "Can we hear from Susan? She's an expert on _____".

4. ENSURING FOLLOW-UP

For a meeting to be beneficial, it needs to be action-oriented, with decisions being made and followed up. Here are a few ideas:

- Before the meeting, potential decisions and outcomes in connection with every agenda item should be defined. It may even be desirable to draft preliminary motions for debate and decision-making. Lengthy reports should indicate proposed actions in a concise form in an "executive summary" at the beginning of the report;
- Discussions of agenda items should be action-oriented, with the overall intention of reaching some form of closure on issues;
- Decisions made should be articulated in a concise and complete form, with a clear definition of "Who will do what and by when?".
- Before closing the meeting, the Chair should briefly summarize progress, decisions made, and follow-up actions to be taken;
- Between meetings, the Chair may wish to monitor progress by contacting members who agreed to perform key tasks.

5. CHAIR'S ROLES

An effective meeting chair directs the discussions in a fair and efficient manner. The chair's challenge is to create a balance whereby people are accommodated, time constraints are complied with, and issues are addressed.

An effective chair assumes the following roles:

- **Setting the tone, guidelines and direction for the meeting**, with the group's support.

- **Deciding who speaks next**, usually on a "first-come-first-served" basis; going by the person who raises the hand first, and not by the person who raises the voice first.

- **Keeping the meeting on track**: reminding "digressing" members what item is being considered; repeating the proposal under discussion from time to time.

- **Keeping the meeting on time**: establishing time limits and a time frame, in consultation with the participants; watching progress versus time frame and reminding participants of time constraints; asking "long winded" members to be brief and to the point.

- **Creating balance**: asking outspoken members to give way to quieter individuals; inviting less assertive members or experts to comment; if needed, initiating a "round table" poll.

- **Listening, watching members**: responding to what people say, but also to the manner in which they say it (vocal and facial expression).

- **Ensuring clarity and encouraging listening**: listening for ambiguities, missed points, generalizations and misunderstandings, and ensuring that people are heard and understood.

- **Re-directing**: shifting the discussions from problems and complaints to solutions.

- **Summarizing and initiating closure**: briefly repeating key points (e.g.: main areas of agreement and main areas of differences); repeating task assignments and ensuring that any missing details are filled in, e.g.: "When would you be able to report back?" Leading to a vote or informal decision on an issue; e.g.: "Am I correct in hearing that the members want to _____?".

- **Varying the pace and the facilitation method**: suggesting a break, small group discussions, etc.

- **Recognizing ideas & progress**: recognizing member contributions as well as progress made by the meeting.

6. CHALLENGING MEETING SCENARIOS

Develop an approach and/or script for the following situations:

1. The discussion is unbalanced, with two members dominating.

2. Someone rambles for a long time and you notice someone else who is anxiously looking for "an opening" to speak.

3. A member was recognized to speak, when another one "barges in" and begins to speak without permission.

4. Two members conduct a loud and distracting side conversation.

5. The discussion becomes personal and members appear uncomfortable with the tone.

6. Three members raise their hands at about the same time, indicating they wish to speak. Variation: A member raises his/her hand and does not put it down.

7. A participant speaks about an item that is not on the agenda (or is scheduled for later on the agenda).

8. A member says with a soft voice (or through facial expression) "I don't think it's a good idea", but this protest is drowned in the loud discussion.

9. There is a heated discussion on the wording of a document to be approved, with three distinct views on it. The discussion is going nowhere.

10. A few important decisions have just been made, but they have not been articulated clearly, and the implementation duties have not been assigned. The members appear ready to proceed to the next item on the agenda, but you want to ensure follow-up.

11. Discussion of a point is lingering on and becoming repetitive, and time is running out (or most members appear ready to move on).

12. Members are rushing to make a decision on an important issue, but you are aware that significant points have not been addressed.