

Meetings That Actually Work



Your Toolkit for Ending Meeting Misery for Good

When was the last time you multitasked in a meeting? Drifted off? Got annoyed? Wished you were anywhere else *but* there?

Now be honest: How many times have your team members had those same feelings in meetings you've led?

Many people today view meetings with a mixture of dread and resignation. Rather than serving the team's purpose, too often they only seem to get in the way of the work.

All that time spent suffering through disorganized or uninspiring meetings adds up. [Research by software developer Atlassian](#) shows that employees waste a staggering 31 hours of unproductive time in meetings every month.

Employees spend
31 hours

of unproductive time in meetings per month.

The salary cost of unnecessary meetings for US businesses:

\$37 billion per year.

– Atlassian

How do you know when *your* team meetings are the ones people are complaining about?

There are plenty of symptoms. The goals aren't clear. Certain people always monopolize the conversation...or never contribute. No one listens to what anyone else has to say. Half the team shows up unprepared. The same problems get rehashed over and over again, while new ideas get shot down. People are just plain bored. Nothing ever seems to get accomplished.

The ultimate responsibility—and blame—for these bad meetings falls with the person who brought everyone together in the first place. That's right: **you**.

It doesn't have to be this way. Meetings should be helping you accomplish the goals and mission of your team, not turning you into public enemy #1. You just need a few tips and tools to think through your meetings approach so that everyone will feel the meeting was worth their time.



Asleep at the Table

91% of attendees

admit to daydreaming during meetings

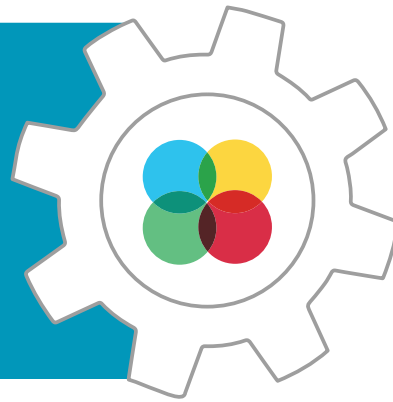
39% have napped

during meetings

– Verizon Conferencing
“Meetings in America”
Study

What's In This Toolkit

If people are multitasking, glued to their phones or getting frustrated during your meetings, it doesn't mean you need more rules. It means you need to run more engaging, effective meetings.



Lead the kinds of meetings people want to attend—and keep their attention all the way through.

In this toolkit you'll find models, work-sheets, templates and tips for before, during and after your meetings to help you:

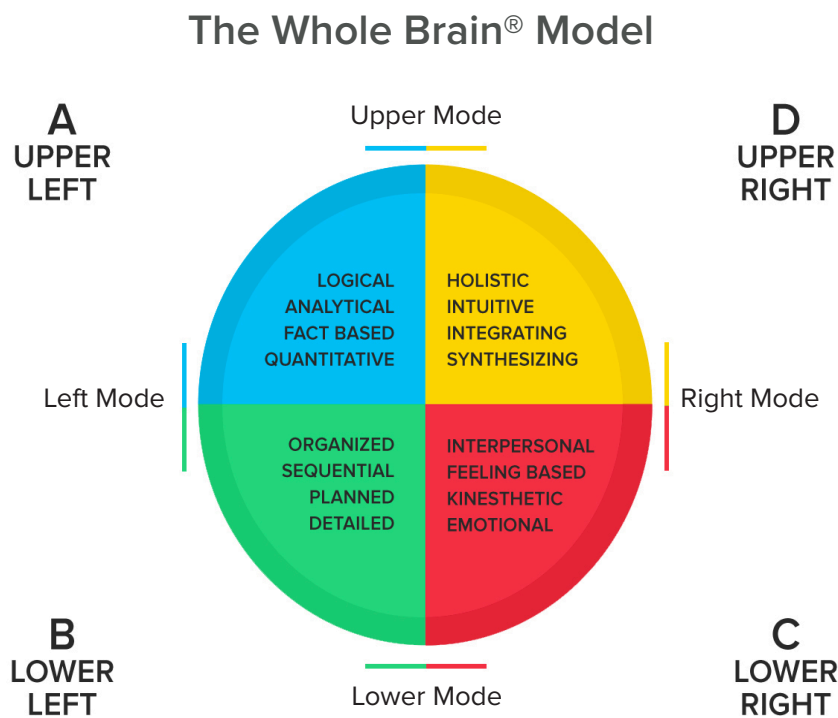
- Understand the way you think and how it can affect the way you design and lead meetings
- Manage and adapt your thinking to better engage all attendees
- Identify the format and agenda that will best serve the meeting's purpose
- Pinpoint the kinds of thinking you'll need at the meeting to get the results you need.

Think before you meet.

Most people walk away from meetings feeling unsatisfied. The reason? Most meetings are designed to address the needs and *thinking preferences* of the meeting leader, not the rest of the people at the table. Don't be that meeting leader.

What do we mean by thinking preferences?

Take a look at Whole Brain® Model below. It's a metaphor for how people tend to use their brains and how their thinking works. It shows that thinking falls into four preference clusters that everyone has access to:



The four-color, four-quadrant graphic, HBDI® and Whole Brain® are registered trademarks of Herrmann Global, LLC.

Think of this as your thinking system, comprised of four different thinking “selves.” All four of these thinking selves are available to you, but if you’re like most of us, you probably prefer to use some over others.

The same is true of your team members. When you design and lead a meeting with only your own preferences in mind, you’re bound to lose those who aren’t on your thinking wavelength. And if you fail to manage and integrate all the thinking at the table, you and the team will be missing out on the diverse perspectives you need to do great work.

Think your way to better meetings.

The good news is, not only can you use the Whole Brain® Model as a first step to understanding the different thinkers who may be in your meetings, you can also use it as a handy tool for organizing, planning and leading highly effective meetings.

Let's put it to work.

Before: Planning Your Next Great Meeting Use a Whole Brain® Approach.

In addition to helping you think through what needs to be accomplished in the meeting, this tool will help you address the needs and expectations of your participants.

Leading Effective Meetings Walk-Around

<p>A</p> <ul style="list-style-type: none"> <input type="checkbox"/> Provide objectives and agenda in advance with times, topics and responsible parties. <input type="checkbox"/> Be efficient in your process. <input type="checkbox"/> Focus on the bottom line and be succinct. <input type="checkbox"/> Give clear descriptions of goals / outcomes. <input type="checkbox"/> Provide appropriate data and financials. <input type="checkbox"/> Plan for analysis, debate and critical discussion. <input type="checkbox"/> Evaluate the process for improvement. 	<p>D</p> <ul style="list-style-type: none"> <input type="checkbox"/> Allow time to “get out of the box.” <input type="checkbox"/> Provide variety and opportunity for fun. <input type="checkbox"/> Allow time for brainstorming, concept discussions and free flow of ideas. <input type="checkbox"/> State the vision and discuss the future. <input type="checkbox"/> Lighten up. <input type="checkbox"/> Provide objectives to stimulate thinking. <input type="checkbox"/> Discuss the “big picture” or global context
<p>B</p> <ul style="list-style-type: none"> <input type="checkbox"/> Be consistent, respect meeting protocol. <input type="checkbox"/> Provide a detailed agenda sent well ahead of time. <input type="checkbox"/> Take notes and provide to all after meeting. <input type="checkbox"/> Establish action items with who, when, how and where. <input type="checkbox"/> Stay on track, avoid side conversations. <input type="checkbox"/> Send agenda in advance and stick to it. <input type="checkbox"/> Assign clear roles (facilitator, timekeeper, note taker). 	<p>C</p> <ul style="list-style-type: none"> <input type="checkbox"/> To “connect,” start with a check-in process. <input type="checkbox"/> Encourage all to voice their ideas. <input type="checkbox"/> Include diverse attendees. <input type="checkbox"/> Provide food, comfortable room and seats. <input type="checkbox"/> Allow time to share and build trust <input type="checkbox"/> Allow for informal, spontaneous input.

Instructions:

1. Determine what you want to accomplish in the meeting.
2. Determine the best format for achieving that outcome and how much time it will take.
3. Design your agenda with that context in mind.
4. Review the Walk-Around to determine which quadrant(s) are likely to create frustrations for any of your team members and what proactive steps you can take to address those potential frustrations.

“The biggest waste of time,

according to **47%** of
our **respondents**,
is having to attend
too many meetings.”

– Salary.com study,
“Why and How Your
Employees are Wasting
Time at Work”

Your Turn:

Put on your thinking cap

1. What I want to accomplish with this meeting:

- A solution
- A plan
- A decision
- Shared information
- Increased trust
- Other: _____

2. The best format for achieving that outcome and how much time it will take:

Format:

- Traditional meeting
(e.g., in office/conference room)
- Standup meeting
- Offsite meeting
- Conference call
- Web conference call/Google hangout
- One-on-one meetings
- Email
- Online chat (e.g., Slack, Chatter)
- Other: _____

If you selected one of these,
do you really need a meeting?

Time required: _____

3. Agenda template/checklist:

This sample assumes participant roles are clear and someone has been designated to take notes. If not, clarify in advance, as well as purpose, context and overall agenda.

Welcome/greeting **C**

Briefly describe purpose of the meeting: What are we here to do? **A**

Brief reminder of context for meeting: Why are we here? **D**

Agenda recall: How will we do it? **B**

Follow agenda with any data, planning, collaboration and brainstorming as needed. **A/B/C/D**

Discuss next steps: Action planning/Who-What-Why-How-When and roles. **B/C**

After meeting, send out notes. **B**

4. Which quadrant(s) are likely to create frustrations for any of my team members?

Leading Effective Meetings Walk-Around

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Quadrant	Team Member(s)
A	_____
B	_____
C	_____
D	_____

Proactive steps to address those potential frustrations:

Before: Planning Your Next Great Meeting

Mix it up to get buy-in.

Use the Whole Brain® Model to identify ways you can incorporate different approaches into your meetings. You'll get more buy-in from your team and keep their attention longer. Consider rotating activities or strategically applying them to appropriate meeting situations.

<p>A</p> <ul style="list-style-type: none"> <input type="checkbox"/> Be goal focused. <input type="checkbox"/> Be brief and to the point. <input type="checkbox"/> Send objectives and the agenda in advance with times, topics and roles. <input type="checkbox"/> Respect the timetable. <input type="checkbox"/> Focus on the bottom line: Time is money. <input type="checkbox"/> Try out new technology and tools. <input type="checkbox"/> Succinctly articulate outcomes. <input type="checkbox"/> Provide appropriate data and financials. <input type="checkbox"/> Allow time for relevant analysis and debate. <input type="checkbox"/> Debrief to measure the effectiveness of your approach and adjust as necessary 	<p>D</p> <ul style="list-style-type: none"> <input type="checkbox"/> Be more spontaneous about when, how and whether to meet. <input type="checkbox"/> Provide big picture context for meeting topics. <input type="checkbox"/> Bring toys and encourage doodling to spark thinking and reduce stress. <input type="checkbox"/> Allow for brainstorming, concept discussions and the free flow of ideas. <input type="checkbox"/> Challenge the team's assumptions. <input type="checkbox"/> Loosen up on the agenda, clock and any other structure. <input type="checkbox"/> Avoid spending too much time on tactical pursuits. <input type="checkbox"/> Stay curious about the future.
<p>B</p> <ul style="list-style-type: none"> <input type="checkbox"/> Hold regular meetings with agreed-upon formats (e.g., weekly staff meeting, monthly division meeting, quarterly client review). <input type="checkbox"/> Send a detailed agenda ahead of time. <input type="checkbox"/> Assign a clear role to each participant. <input type="checkbox"/> Reign in side conversation and stick to the agenda. <input type="checkbox"/> Start and end on time. <input type="checkbox"/> Ensure protocol is respected. <input type="checkbox"/> End with clear action items stating who, when, how, where. <input type="checkbox"/> Send minutes to all participants following the meeting. 	<p>C</p> <ul style="list-style-type: none"> <input type="checkbox"/> Purposely invite a cross-section of people from different teams and departments. <input type="checkbox"/> Use meetings to share and build trust. <input type="checkbox"/> Allow for informal, spontaneous, "offline" meetings. <input type="checkbox"/> Include team building activities that encourage team members to connect. <input type="checkbox"/> Have a check-in process at the beginning that gets everyone engaged. <input type="checkbox"/> Use a process that builds ownership and stronger team interaction, where all ideas are heard and respected. <input type="checkbox"/> Debrief. Did the right things get surfaced? Did we get to root causes or jump to quick fixes? Were everyone's ideas respected?

Before: Planning Your Next Great Meeting

Think through project meetings and assignments.

Before you start blasting out the email invitations, who really needs to be at that meeting?

Use your team's time and thinking wisely to get the results you need.

Especially when you're working cross-functionally, but for any kind of team project or complex task work, you can be more efficient and get the best from your team's thinking and talents by following this four-step approach:

Assess **B**uild **L**ink **E**ngage



Step 1: Assess your team’s thinking preferences using a validated tool like the [HBDI® assessment](#). It’s important for every team member to understand the range of differences in how people think, because this provides a context for people to answer questions such as: Why is somebody even asking me this question? What is the information that my team members need?

The Takeaway:

You can minimize friction during meetings when you give people the insight to say: “That person is not trying to annoy me. He just thinks in a different way.”

Step 2: Build a path to successful teamwork. We’re not talking about “touchy-feely” teambuilding activities here. Instead, it means looking up from the task at hand and creating an effective process for getting that task done. Take a moment to think about the following questions:

- Does everyone have a clear understanding of our purpose?
- What are the principles we want to maintain as a group?
- How can we take advantage of the differences in our thinking instead of seeing them as obstacles?

Step 3: Link the mental demands of the work/project phase to what each team member brings to the table. Some projects or phases are technical in nature; others are more people-oriented. Many make both of these demands and more. Match these demands with the thinking preferences of your team members so you can bring together the people best suited to tackling the work.

What are the mental demands of the work/project phase:

- A quadrant (technical, analytical)
- B quadrant (process oriented, detailed)
- C quadrant (people oriented, expressive)
- D quadrant (big picture, imaginative)

Who on my team is a “mental match” for those demands?

Where are the gaps?

- A quadrant (technical, analytical)
- B quadrant (process oriented, detailed)
- C quadrant (people oriented, expressive)
- D quadrant (big picture, imaginative)

Who can we invite to fill that need—or, if necessary, what will we do to stretch our thinking to fill that need?

Step 4: Engage each team member in a way that allows them to shine, work effectively with each other and get the work done.

Review the Leading Effective Meetings Walk-Around on page 10 for tips on engaging the thinking of each of your team members.

During: Leading Your Meeting of the Minds

Hello? Is this thing on?

With [attention at a premium in today's world](#), keeping people engaged, even when they're sitting right in front of you, is one of the biggest challenges you face as a meeting leader.

Fortunately, we know a few things about the brain that can help. Try these tips to capture and keep your team's attention throughout the meeting:

- ❑ **Don't make it a one-way conversation.** Attendees will find your meetings more valuable if they have the opportunity to contribute, and it's the best way for everyone to benefit from the team's brain trust. If people aren't engaging, ask questions and invite participation.
- ❑ **Make it interesting!** A simple but too-often overlooked fact about the brain: People don't pay attention to boring things. Incorporate a variety of activities to provide the stimulus the brain needs to stay engaged. Refer to the model on page 11 for ideas.
- ❑ **If it's going to be a long meeting, provide frequent breaks.** This not only gives people time to check messages or follow up on other matters, it's also important for the brain. Memories strengthen during periods of rest, even when we're awake.
- ❑ **Create challenge.** People tend to avoid discomfort, but that's where learning happens. Your team will ultimately find better, more complete solutions to problems when it works through challenges rather than waiting for someone to provide the "right" answer.
- ❑ **Engage emotions:** Emotion enhances retention and builds deeper connection. Try using humor, novelty, video and stories as appropriate.
- ❑ **Light up the brain with exercise:** Exercise will literally get your team thinking, so if you have a complex project or meeting that will demand heavy mental processing, consider a "walking event" or conducting an activity that requires movement immediately beforehand.

After: Review, Rethink, Repeat

Don't let your meetings get stale.

With recurring meetings, it's easy to fall into a routine and continue with it, even if it's outlived its usefulness or the format no longer serves the purpose. Do a periodic check-in with the team to make sure what you're doing still makes sense. Here's a quick exercise you can try:

- Ask your team** to describe the best meeting they have ever attended. What were the key elements that made it so successful?
- Have each team member **write these thoughts on a Post-it note**.
- Place 4 flip charts in the room**, and have the team members sort the Post-it notes according the guidelines on the Walk-Around on page 10.
- Use the thinking quadrants** as criteria to determine the effectiveness.
- Make an action** plan based on what you've discussed, and use this process to prepare for the next team meetings. If you need to change up your approach, refer to the list on page 11 for ideas on how you might mix it up.
- Continue to proactively ask the team for feedback** after meetings.

92% of meeting attendees

value meetings that provide them with an opportunity to contribute, suggesting that successful meetings may be a contributing factor to employee job satisfaction.

– Verizon Conferencing , “Meetings in America” Study

Stuck for ideas? Try these strategies to spark your (and your team's) creativity:

- Use “magic wand”** thinking to uncover new ways of handling the meetings:

Ask...WHAT IF...I had a magic wand and could solve this with no constraints on what the meeting format might look like or how “off the wall” it might be. What would the solution look like?

Explore the underlying concept of the idea. What makes it work?

- Use TLC** to turn “crazy” ideas into actionable solutions:

What is tempting about the idea?

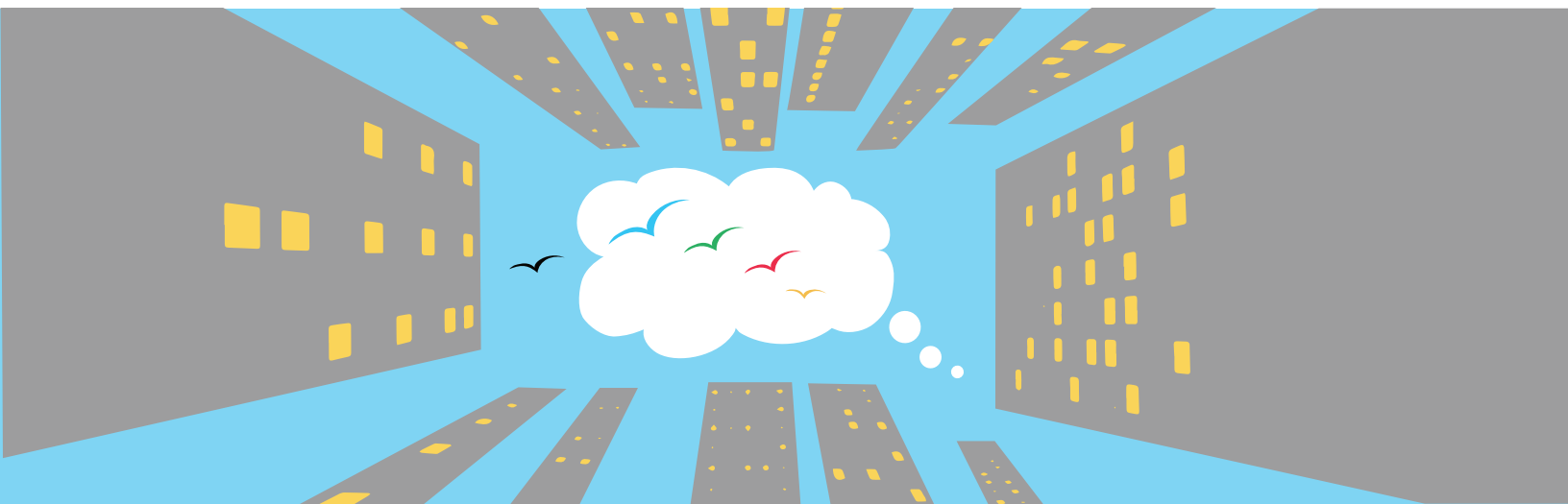
What is lacking?

What could we change to make it work?

The Big Green Meeting

A case study on how to plan a meeting with your objective in mind.

By Georgia Jarvis, Georgia Jarvis and Associates



The Challenge: This nonprofit national organization has a network of member organizations (chapters) nationwide that function as separate corporations, each with a membership agreement with the national headquarters.

The national headquarters provides consultation to chapters and assists with cultivation of corporate donors and other fundraising. Customer service (chapter) expectations are a driving factor in the activities of the national headquarters. Eight departments work with customers, each having a different perspective on customer needs and appropriate strategies to meet those needs.

The management team holds two planning retreats a year for strategic planning and goal setting. These meetings are very energizing: For two or three days, the team lives in the world of possibilities—imaginative, big picture, creative and very exciting. However, these planning meetings stay at the 10,000-foot level. When management returns from the retreat, each department is then responsible for developing objectives to meet the goals.

Each department works independently, developing strategies for the same set of customers, to achieve the goals for their department, which then supports the organization-wide plan. The team wanted to better integrate planning and strategies across all departments as well as improve implementation of initiatives and follow-up.

The Approach: The management team had participated in a Whole Brain® Thinking session and received their HBDI® Profiles. Shortly after that session, it became apparent that what was missing from the process were the lower left, B-quadrant activities needed to make sure the big, bold ideas were implemented and that there was follow-through.

The decision was made to hold an interdepartmental meeting of all management and other appropriate staff responsible for implementation. There had never been a meeting like this before. The goal was to take the organization-wide goals and department objectives and together determine what they would implement or try to achieve, how they would go about it (group vs. individual, training, presentations, etc.), and who would be the lead and be accountable for follow through. Additionally, they would have a collective prioritization process.

They called this The Big Green Meeting to underline its purpose. This was not a time to create new ideas and projects or to renegotiate the annual goals. It was about process and procedures that would help everyone get the job done. It was about setting up systems for follow-through and timeframes. Green folders were provided for everyone, and they did a whole theme around the meaning of “Big Green.”



The Results: Participants were very excited with the process, and there was a strong commitment to the final product. The meeting helped all become much more interdepartmentally focused rather than being locked into their own departments. There was a great deal of sharing of information and camaraderie around the challenges facing staff. An unanticipated outcome was the strengthening of relationships between the different departments.

Follow-up from the meeting was strong. Commitments were kept and objectives achieved. Not only that, working relationships were improved, which resulted in greater interdepartmental communication and fewer mixed messages to customers. Additionally, travel expenses decreased (due to “fixing” situations that had not been planned properly) and customer satisfaction increased. The meeting continues on as an annual event known as The Big Green Meeting!

Let's wrap it up with some Whole Brain® reminders:

D: Why: Give context for the meeting.

B: How: Provide an agenda.

A: What: Dive into the content.

C: Who: Look out for frustrations; facilitate interaction.

And a final thought:

Your team is your brain trust. All that insight and knowledge is too valuable to be wasted in unproductive meetings. Use the tips and ideas in this toolkit to end the plague of “meetings misery” once and for all! Your team will thank you—and everyone will benefit.

Looking for more?

In today's complex environment, teams need to function like well-oiled machines to get the job done. Learn how a Whole Brain® approach to collaboration, communication and leadership can take your team to the top.

Request a Consultation



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