How to Create and Facilitate Meetings That Matter

Learn how to plan and run a successful meeting using crucial checklists.

Janice M. Francisco

We're having too many %$*# meetings!" is a familiar cry that echoes through the corridors of many workplaces – particularly when meetings are held by default and treated as events rather than a process. Records and information management (RIM) professionals have a unique opportunity to change the meeting experience in their organizations by creating and facilitating meetings that matter, and in the process, ensure corporate memory is captured.

Everyone has been there – trapped in a useless, frustrating, unproductive meeting wondering what they are doing and why so many others have been invited to do it with them. Despite their grumblings, everyone continues to agree to show up to unproductive meetings perplexed about the purpose, conflicted about the time they are investing, and despondent about the results. Layer on top of this the fact that many meetings are held without published agendas or an appropriate process for productively thinking about and capturing the decisions and actions generated, and the stuff of nightmares is scarily conjured to mind.

As change agents in their organizations, RIM professionals are in a position to alter the meeting experience. By leading a shift in organizational focus to help managers and staff get mindful about how they engage in the meeting process, significant improvements can be made to time invested and results obtained.

"Mindful Meetings" are productive meetings with clear purpose and objectives, that involve the right people at the right time, and that use proven techniques to get the most out of the time invested. They don't happen by accident – key ingredients are preparation, good facilitation, balanced thinking, good recordkeeping, and appropriate follow-up.

Creating and facilitating effective meetings require three things: 1) preparation, 2) conducting and documenting the meeting, and 3) following up.

Step One: Preparation

Only certain situations necessitate a meeting, so in preparing for the meeting, the first question to ask is, "Should we meet?" Typically, meetings are needed

- To present information better delivered in person
- To get input from others
- To gain buy-in on an issue
- To motivate and energize the team
- To solve problems

To help decide whether a meeting is needed, consult the "'Should You Meet?' Checklist" to assess how strong the case is for meeting. "No" responses on the checklist represent opportunities to find alternatives to meeting or to refine the thinking about and planning for the meeting. A "no" response to question 8 might be an opportunity to engage a professional meeting facilitator to assist participants in working together better.

Assuming the answer to "Should you meet?" is "yes," begin to prepare the meeting details. There is good reason why it is often said that "the devil is in the details." Meeting preparation goes beyond setting the purpose and objectives, writing an agenda, and hitting the invitation button on the meeting scheduler. Essentials for a successful meeting include:

- Inviting the right people for the right reasons
- Taking care of the logistical details to

> ### At the Core
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> **This article**
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> ▶ Identifies the dilemma of pointless meetings
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> ▶ Devises a three-step plan for holding productive meetings
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> ▶ Points to the benefits of "Mindful Meetings"

Figure 1: The "Should You Meet?" Checklist

Should You Meet?	Yes	No
1. Can you state the purpose of your meeting?	☐	☐
2. Is your meeting purpose worth the time and cost of participants' time?	☐	☐
3. Will meeting be more efficient and produce better results than sending an e-mail or making phone calls?	☐	☐
4. Do you really want and / or need the input of participants?	☐	☐
5. Are you truly going to act on participant input?	☐	☐
6. Do you have the information you need to meet productively?	☐	☐
7. Will you and the participants have enough time to prepare for the meeting?	☐	☐
8. Are the participants going to be able to work together on the issue(s) necessitating the meeting?	☐	☐

ensure the meeting runs smoothly, efficiently, and according to plan

• Ensuring adequate meeting space and resources to conduct the meeting

• Providing participants with sufficient lead-time to prepare for the meeting

Getting the right people to the meeting is a critical factor. To ensure this, first consider what needs to be achieved at the meeting. Next, make a list of the name of each person to invite. Then, beside each name, identify the reason they should be invited. If there is not a productive reason to invite a person, cross him or her off the list.

Select people who are stakeholders and can make a clear contribution to achieving the meeting objectives. They may not need always to be in attendance, particularly if their role could include providing background information or other documentation to support the meeting. If decisions are required in the meeting, make sure to select participants with decision-making authority.

As a rule of thumb, an ideal meeting size is six to eight people – beyond that, productivity goes down and the chance for conflict increases. If more people must be included, a skilled facilitator will be needed to manage the meeting process and group dynamics.

Step Two: Conduct the Meeting in a Mindful Way

French microbiologist and chemist Louis Pasteur said, "Chance favors the prepared mind." As the meeting date draws near, use the "Are You Ready? Checklist" to ensure that everything needed to make the meeting run smoothly and efficiently is ready.

Once meeting participants have assembled and the meeting is underway, conduct the meeting in a mindful way:

1. Get everyone on the same page.

2. Strike the right balance between creative and critical thinking to productively support discussion and decisions.

3. Document the meeting and its accomplishments by capturing meeting minutes and actions.

4. Evaluate the effectiveness of the meeting

Get Everyone on the Same Page

It is likely that the people attending the meeting have more than the meeting's objectives on their minds. One way to get everyone on the same page is to start the meeting by facilitating an exercise to "ground" participants in the purpose and objectives of the meeting and having the group identify norms for the behaviors they would like to live by in the meeting.

Strike a Balance in Thinking

One of the roles of a meeting facilitator is to help groups think better. There are distinct thinking processes associated with creative (divergent) and critical (convergent) thinking. Skillfully using these thinking processes makes a world of difference to the meeting's effectiveness. Too much creative thinking and the group becomes overwhelmed at the thought of all the possibilities; too much critical thinking and ideas are not given sufficient time to come to life and choices for action become severely limited. Those who are not familiar with the techniques that can be used to balance thinking and the mechanics of creative versus critical thinking should either find a skilled facilitator to conduct meetings or get formal training in facilitation themselves.

Document the Meeting

A meeting contributes to corporate memory and is one event in the greater context of achieving organizational objectives. As such, document the outcomes of discussion, decisions, and actions. Use a standard word-processing template for capturing meeting minutes, and task someone at the meeting with the responsibility for documenting decisions and actions to ensure that corporate memory and capital intelligence are retained.

Be sure to plan for success and be realistic about what can be achieved and in what timeframes. Assign action items only to people in attendance so timing and scope can be appropriately negotiated.

Evaluate the Meeting

So, everyone was on the same page, the meeting was documented, and a reasonable list of actions was generated – but that doesn't guarantee that the meeting was effective. Because meetings and meeting facilitation are learning processes, have

Figure 2. The "Are You Ready?" Checklist

Are You Ready?	Yes	No
1. Is the meeting room configured appropriately for the meeting, and are there sufficient chairs for all participants?	☐	☐
2. If using flipcharts in the meeting:	☐	☐
a. Do you have sufficient flipcharts and paper?	☐	☐
b. Do you have flipchart markers?	☐	☐
c. Do you have masking tape (or self-sticking flipchart paper) to affix completed charts to the walls?	☐	☐
3. If presenting information using a laptop computer and overhead projector:	☐	☐
a. Are all the presentation files installed and working on the computer?	☐	☐
b. Do you have all the cables and extension cords required to make the laptop and overhead projector work properly?	☐	☐
c. Have you tested the functioning of the laptop with the overhead projector?	☐	☐
4. If you are planning special activities in the meeting, do you have all the supplies to support these activities?	☐	☐
5. Have you planned how you will capture meeting minutes, actions, and decisions in the meeting?	☐	☐
a. Who will take the minutes?	☐	☐
b. How will minutes be recorded – by hand with note paper or on a laptop?	☐	☐
c. Do you have the appropriate supplies for recording the minutes?	☐	☐
6. Have you planned how you will complete and distribute meeting minutes and handle any additional follow-up items?	☐	☐

Figure 3. Meeting Exit Survey

Using the following rating scale, please tell us about how you experienced this session. 1= Poor 2= Fair 3= Satisfactory 4= Good 5= Excellent	Rating
Output – How well did we achieve what we needed to achieve?	
Use of time – How well did we use the time allotted?	
Participation – How well did we make sure everyone was appropriately involved?	
Decision Making – How well thought-out were our decisions?	
Action Plan/Next Steps – How clear and doable are our action plan / next steps?	
Comments?/Questions? – Are there any comments you would like to make about this meeting, the methods, or the processes you experienced? If so, please include them in the space below.	
Organization – How well was the meeting run?	
Facilitator(s) – How effective was the facilitator?	

participants complete a meeting effectiveness survey (see Figure 3) to gauge how effectively the meeting was planned and conducted and how well participants contributed to meeting outcomes.

Step Three: Follow Up

The meeting is over, but in some ways, the work may only be beginning.

Follow-up and follow-through are critical to moving organizational agendas forward. In a business climate where accountability is under a microscope and results are demanded, it is essential that action items be successfully completed. The best tools for follow up are an electronic calendar or a task list with items to be brought forward. Subsequent related meetings should include an agenda item to review action items from previous meetings and report and document their progress.

Meeting minutes should be completed within an agreed-upon timeframe – the sooner the better – so people with action items are reminded about them and can begin work on them quickly.

The more promptly and consistently the meeting facilitators follow up and follow through on their commitments to supporting the meeting process, the greater

level of respect and attention they will command from meeting participants.

Set the Example to Change the Culture

The key ingredients of effective meetings are preparation, good facilitation, good recordkeeping, and appropriate follow up. By using these suggested processes and tools, RIM professionals can help change the organizational culture and eliminate their own and others' grumblings about time-wasting meetings. As meeting attendees, they should insist that meeting invitations are accompanied by agendas and sufficient details about what is to be accomplished and why their attendance is needed. As facilitators, they should endeavor always to create and facilitate meetings with a clear purpose and objectives, involve the right people, and use proven techniques to get the most out of the time invested. ◗◖

Janice Francisco is a change facilitator based in Ottawa and Deep River, Canada. She holds an MSc in Creativity and Change Leadership from the International Center for Studies in Creativity in New York and is an International Association of Facilitators Certified Professional Facilitator. In 2001, she founded BridgePoint Effect, which has contributed to the success of more than 15 RIM initiatives. She can be contacted at janice.francisco@bridgepointeffect.com.

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