

Patterns for Leading Effective and Efficient Meetings

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Are you lonely???
Don't like working on your own?
Hate making decisions?
Rather talk about it than do it?

Then why not

CALL A MEETING!!

You can
SEE people
DRAW flowcharts
SLEEP in peace
FEEL important
IMPRESS (or bore) your colleagues
LEARN to write volumes of
meaningless notes
MAKE meaningless recommendations

ALL on COMPANY TIME !!!

**MEETINGS....
THE PRACTICAL ALTERNATIVE TO
WORK**

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1. Introduction

Statistics¹ reveal that of professionals attending meetings on a regular basis:

- 91 % admit to daydreaming during meetings
- 73 % say they have brought other work to meetings
- 39 % say they have dozed during meetings

According to research 50 % of meeting time is unproductive and 25 % of meeting time is spent discussing irrelevant issues².

Many of us spend a high percentage of our work time in meetings. Often these meetings are frustrating, as they seem endless, ineffective and a waste of time. But meetings are essential to business life. They are necessary for planning, reaching decisions, building teams, finding solutions...

Are they just a necessary evil, or is there a better way?

As we all know and countless books on organising and leading meetings state, meetings can actually be made effective, energetic and fun...

But our experience shows us: it is difficult! So we need all the help we can get.

The prerequisite for effective and efficient meetings is organising the meeting well. The following patterns address problems that occur on this "process level" of organising meetings. They answer questions in the context of how to lay the structure for an effective meeting and how to implement this structure. Part of implementing the structure is dealing with situations in which the meeting is in danger of becoming ineffective - for example because the discussions have gone off track. This problem is addressed in **Switch to the Meta-Level** and in **Park Tangential Issues**.

This paper has collected five patterns on leading meetings effectively. The selection does not imply that these are the most important - they were the most concrete and tangible to me - and so seemed a good point to start with. At the moment they obviously do not form a pattern language. Maybe in time a pattern language for leading effective meetings might grow...

The patterns **Develop A Structured Agenda** and **Do Refreshments** are to be used in preparation for the meeting while the patterns **Park Tangential**

¹ A network MCI Conferencing White Paper. Meetings in America: A study of trends, costs and attitudes toward business travel, teleconferencing, and their impact on productivity (Greenwich, CT INFOCOMM, 1998), 10.

² http://www.mmm.com/meetingnetwork/readingromm/meetingguide_make.html

Issues and Switch to the Meta-Level and Tabulate Your Minutes are used in the actual meeting. Tabulate Your Minutes is partly implemented after the meeting. At the end of the paper I have included an appendix with thumbnails of further meeting patterns.

2. Vision: Effective and Efficient Meetings

Before taking a look at the patterns, let's take a moment to take a closer look at the goal. What are efficient meetings? When does one call a meeting effective?

Meetings happen on at least two levels. The factual level – people meet to present information to others and review, evaluate, discuss, problem-solve, reach decisions together. But people also meet for social reasons. They have the underlying wish to achieve results and make an impact. They have a desire to communicate and to build and share a common reality. Therefore both aspects have to be included in organising an effective meeting. A meeting has to be made effective by addressing both levels.

Meetings are effective if they have an effect – if they produce the desired result i.e. a decision and/or an action plan in a reasonable amount of time.

An effective meeting is also one where the participants feel good about themselves and the group, willingly and openly share their ideas and concerns, work together constructively and positively and leave the meeting feeling fulfilled and glad to be part of the group. They also have the feeling their time was well spent.

Key points of an effective meeting are that

- Goals were reached in an acceptable time.
- It had a clear objective known to every participant.
- The discussion in the meeting was focussed and well informed.
- The communication was constructive most of the time and not first and foremost confrontative.
- Hidden agendas were either explicitly stated in the meetings or did not hinder the process of reaching a workable decision.
- At the end of a meeting a decision (or several decisions) was (were) reached that was (were) accepted by every participant and that could actually be implemented. Precise action items were distributed and

everyone knew what the next steps were that have to be taken and by whom.

- The Time schedule was kept.

3. Scope

In this section of the introduction I would like to define the scope of the paper more precisely by stating the audience and the specific context. This will help set the stage for the following patterns by stating which context the patterns were written for. Stating this context upfront makes boring repetitions in the context section of each section obsolete. If necessary the context will be defined more clearly in the specific pattern. Otherwise the context section of each pattern will only state in which phase (meeting preparation, during the meeting, after the meeting) the pattern is to be applied. Of course it is possible that the patterns are applicable in other contexts as well. But defining a precise context helps to understand better what prerequisites have to be in place, so that the pattern works.

3.1 Audience

The patterns in this paper address the leader/organiser/moderator of a meeting. Obviously the leader and the moderator do not have to be the same person – but they often are.

3.2 Specific Context

A meeting can be defined as *a formally arranged gathering or the social act of assembling for some common purpose.*

The participants are all present in the same room

According to the definition above, telephone conferences and videoconferences are also meetings – as are online meetings – i.e. meetings in chat rooms etc. But as they take place with totally different prerequisites from those where the participants are actually present, I am excluding them from the context of this paper. The patterns in this paper are applicable to people gathering in one room for some common purpose.

Focus: Reaching decisions

This definition is still too general, however. There are different kinds of meetings. And effectivity can mean different things in different kinds of meetings.

- Some meetings have the sole purpose of exchanging information.

- Some meetings have the purpose of discussing problems, engaging in creative thinking and generating ideas. They do not necessarily need to have a decision at the end of the meeting.
- Some meetings have the purpose of reaching decisions on one or more points.
- Other meetings have the purpose of building relationships and commitment.

Most meetings want to reach all of the above goals to some extent. But mostly there is an emphasis on one point. For example, a meeting might have the purpose of discussing problems, exchanging information and reaching decisions but discussing problems and exchanging information might just be tools for reaching decisions. Then the meeting would have an emphasis on the purpose of reaching decisions.

Another meeting might have the same three purposes (discussing problems, exchanging information and reaching decisions) but have the main emphasis on collecting creative ideas on solving a problem. It might be nice if decisions were reached – and exchanging information is often necessary for fruitful discussions but the main aim is to have a time of creative brainstorming.

The patterns in this paper are especially applicable to meetings that have an emphasis on reaching one or more decision(s) irrespective of the question whether the participants meet on a regular basis or not.

3.3. What this paper does not address directly:

- Patterns for influencing a meeting if one is only a participant and not a leader.
- Specific problems that can occur in meetings – such as demotivated participants, hidden agendas, conflicts and how the leader can deal with these problems in the concrete situation. These are very important issues that may be addressed in a later paper after the ground work on how to organise an effective meeting has been laid.

4. Structure of the patterns

Each pattern in this paper is structured as follows:

Context

The context section is comprised of the information in which phase of the meeting the pattern is relevant.

Problem

States the problem the solution solves.

Forces

States the pattern's forces – i.e. why the problem is the problem, what aspects influence the solution or the path to the solution.

Solution

States the solution.

Consequences

Everything we do has positive and negative effects and side effects. The consequences section shows to what extent the forces are balanced by using the solution. It collects the benefits and the liabilities of using the solution.

Implementation

The implementation section gives concrete tips on how to implement the pattern in actual meetings. These sections are sometimes long – and may even include other patterns that might be extracted in future papers

Structured Agenda

If you don't know where you are going, you will probably end up somewhere else.

Lawrence J Peter

Things which matter most must never be at the mercy of things which matter least.

Goethe

Context

Meeting preparation.

Problem

Meetings tend to be poorly organised, lacking in focus and to drift in different directions. In extreme cases during the meeting no one is actually sure what the actual subject of discussion is. At the end of the meeting everyone has the vague feeling that important issues may have been raised but no one is sure if the problem has been solved – as the problem isn't clear. Often the members do not really care – apathy reigns. They just arrive at a meeting and sit waiting for the meeting to end. The leader isn't able to break out of this cycle.

Forces

- ◆ Focussed meetings are good as they help you spend as little time as possible in meetings and achieve results. A precise, concise discussion on a defined topic with an outcome furthers a project.
- ◆ Teamwork achieves best results if the people feel valued and if the working atmosphere is effective and constructive. Unfocussed meetings tend to demotivate and bore people. This can even drain their energy for the work time following the meeting.
- ◆ People tend to let their minds wander, daydream, work against each other or even become actively resistant if the meeting's direction is not clear.
- ◆ Time is a limited resource.
- ◆ It is difficult to keep a meeting focussed and on track.
- ◆ The better prepared the participants come the more information flows into the decision-making process.
- ◆ Some people tend to propagate and follow their own meeting purpose if they have no clear idea about the actual purpose of a meeting. If several

Structured Agenda

people do this the meeting may wander in as many directions as there are participants.

- ◆ Most people have the wish to accomplish something and not waste time.
- ◆ People tend to save time on preparation and activities where the positive results are not seen directly.
- ◆ It is very difficult to find the right priorities on the fly without thinking about and formulating the priorities.
- ◆ If a meeting is unstructured important issues may be overlooked or forgotten.
- ◆ People who organise meetings often have a very full schedule.
- ◆ In democratically led groups some people do not like to take charge because this might not be popular.
- ◆ Some people like to hear themselves talk.

Solution:

Develop a structured agenda that states the precise goals, the necessary preparation for each agenda point, the approximate time needed. You could even add the people each agenda point is relevant for. And stick to the agenda.

Consequences

1. Benefits

- ☺ The participants are more motivated for several reasons:
 - The participants feel valued because they see the leader values their time and does not treat it as an endless, cheap resource.
 - Because of the clear structure the participants tend not to feel bored or helpless (“this meeting will be endless...and I can’t do anything about it”)
 - By telling the participants what the goal of the meeting is, they have a good feeling that the meeting will actually have a structure and so there will be a distinct possibility it will not be a waste of time. And they know how long it takes and what to expect. This helps them get constructively involved in the meeting.

Thus the atmosphere of the meeting is better, the participants concentrate better and are more inclined to participate.

Structured Agenda

- ☺ Important issues are addressed in an orderly manner – i.e. there is enough quality time for the really important issues.
- ☺ Having a structured agenda improves the chances of having a structured meeting. This – in turn – saves time.
- ☺ Most people – even in democratic groups – are very happy if someone takes charge in order to organise the meeting, as this gives everyone a feeling of direction.
- ☺ Writing down goals and an agenda helps you as a leader to clarify and evaluate the goals more critically. This helps you make the meeting more structured and so more effective.
- ☺ Through sending a structured agenda to the participants beforehand, they know what to prepare for and whether they need to attend. There is a better hope of having participants who are prepared. And the better prepared the participants are, the better the decisions.
- ☺ Having an agenda helps when moderating between people who like to hear themselves talk – as you have a structure you can refer to when bringing the discussion back to focus. This helps the participants to see your intervention on the factual and not the personal level.
- ☺ If all participants are clear about the goal and the objectives of the meeting as well as the structure it helps keep the meeting on track because chances are – even if you as a leader lose track of the agenda – someone else will bring the meeting back on track.
- ☺ The meeting has a goal and a structure. The clearer the goal is, the easier it is to actually reach the goal. Without a goal you cannot reach a goal.
- ☺ Since the actual time the meeting and the agenda points are to take is set at the beginning the meetings are shorter – so time is saved in the long run.

2. Liabilities and Limitations

- ☺ There are times when you don't have the time or the knowledge to make an agenda upfront. But it is still a good idea to prepare the agenda at the beginning of the meeting instead of having the meeting without an agenda.
- ☺ This approach only works well if you have the authority to implement the agenda. If it isn't your job to see to it that the meeting takes place in a

Structured Agenda

structured manner and the participants have not agreed on letting you do so, it might be a waste of time.

- ⊗ If you have a standardized agenda that repeats itself every time you meet it might also be overkill to use this pattern. But even then a written agenda as an invitation can help bring structure into meetings – because recurring meetings especially have the problem that they become ineffective because they are just a habit.
- ⊗ There is the danger that you block creativity if you formulate the goals too narrowly. **Solution:** The leader of the meeting should keep an open mind and learn to be sensitive to whether the participants are too focussed. If so, the leader can interrupt the process with a creativity game. This has the effect that the others can become more relaxed and creative. If nothing helps – you might have to meet another day.
- ⊗ There is a danger that the participants do not feel that their positions are adequately represented in the goal. **Solution:** Give everyone the chance to give feedback to the agenda beforehand and – if necessary – change the agenda.
- ⊗ There is also the danger that you become a perfectionist and spend a lot of time trying to formulate the perfect goal instead of the good goal.
- ⊗ Everyone knows an agenda is a good idea – but no one does it. Because of this it is difficult to put into practice.
- ⊗ If this pattern is applied there is the distinct danger that no one really notices. The leader might not get special appreciation for the effort that went into preparing the meeting.

Structured Agenda

Implementation:

1. Precise goals

Formulate the goal or objective for the meeting, that is **Specific, Measurable, Attainable, Realistic and Time dated**. (SMART).

Find out what goal or objective you have for the meeting. Start out with the question what kind of meeting you are going to organise (informational, decision making/problem solving, planning, evaluating, training, celebrational, feedback...).

Then find out the concrete goal:

What should have been accomplished by the end of the meeting? What decisions should be made? What courses of action need to be decided on? What questions should be answered. What has to happen so that the meeting is successful?

(Example: "To design next year's marketing strategy.", "To plan necessary steps to complete the next milestone successfully")

If you cannot think of a goal, then maybe you need to ask yourself the question: "Why meet at all?" (cf. **Don't Meet**)

Try to be as precise as possible – because: the clearer the goal is, the easier it is to actually reach the goal.

Write down the goal (s) or objective(s) at the top of the agenda to make sure they are known to all participants.

2. Precise agenda points

Each agenda point should be a step towards reaching the overall meeting goal(s). To find these agenda points it could be useful to ask the following questions:

- ➔ To achieve our goal, what do we need to do in the meeting?
- ➔ What conversations will be important to the people who attend?
- ➔ What information will we need in order to begin?

Each agenda point should be formulated so that the objective is clear. At the end of the meeting one should be able to assess at one glance if each agenda point was resolved successfully or not.

Structured Agenda

Try to be as precise as possible as clarity leads to effectiveness. The following table should be a help to find verbs that express what the objective is:

analyse	announce	appropriate	summarize
assign	brainstorm	categorize	approve
develop	decide	delegate	clarify
identify	improve	evaluate	determine
prioritise	re-evaluate	learn	explore
request	review	refine	plan

Example:

“We want to decide on the tasks needed to accomplish the milestone X and we want to know who will do them” instead of “milestone X” or “discussing milestone X”

Using verbs such as “discuss” alone can be difficult. How does one measure a successful discussion? Why does the group want to discuss the item? Mostly discussion is a tool to reach an objective i.e. a decision.

3. Prioritising

It is a good idea to think about how you want to order the agenda points.

Here are a few tips:

- ➔ If not all agenda points are relevant to all participants it is a good idea to order the agenda points according to the relevance to the participants. Then participants may be able to leave earlier or arrive later (cf. **Structure Agenda According To Participants**)
- ➔ At the beginning of the meeting the participants have most energy and are most lively and creative. You should plan the meetings accordingly – i.e. have items requiring mental energy and clear heads early on the agenda.
- ➔ Key items should be put early on the agenda so they are not left until the end of the meeting when everyone is tired and time may be running out.

Structured Agenda

- You might even consider ordering the agenda items in declining order of importance.
- An item of great interest to everyone might be scheduled for 30 minutes into the meeting to avoid the attention lag that typically occurs at this point.
- When planning the meeting you may notice that some points are less controversial than others. The order of the agenda items then influences the atmosphere of the meeting. You might want to consider this when planning the order of the agenda points. (i.e. start on a point of unity, move to items likely to create differing opinions and end the meeting on a unifying note).
- Especially if you are planning a meeting that takes place regularly then there are often agenda points that occur at every meeting (i.e. reviewing the minutes and action items, reviewing the agenda, reports). Obviously reviewing the agenda has to be dealt with first. But consider moving other items to a later point in the meeting to use the best meeting time (i.e. the beginning of the meeting) for the most important items. Often the most productive time in recurring meetings is used on rather technical administrative agenda points.
- Start the meeting with an opening statement stating the goals and agenda and allowing for an agenda review.
- Close the meeting with a summary and with feedback.

4. Necessary preparation

Stating which preparation is necessary improves the chances that people come prepared and informed and the discussions are of better quality. Far too often the amount of preparation required of the participants is grossly underestimated.

5. Approximate time³

It is a good idea to plan the time you want to take for each agenda point. In this way you can see whether your agenda is too ambitious. Also by timing each agenda point you can make it possible for participants to come later if only later agenda points are relevant to them.

³ Miranda Duncan, *Effective Meeting Facilitation: The sine qua non of Planning*, <http://arts.endow.gov/resources/Lessons/DUNCAN1.HTML> S. 2

Structured Agenda

The difficult thing is to plan how long you need for each item on the agenda. There is no formula that works every time – it is best to plan and evaluate later, and so to find out what works for you. Of course there are several helpful points to consider:

- ➔ Consider the likely level of agreement for each agenda item. Is the agenda point likely to be controversial? if so, it will take more time. Opportunities to voice an opinion, ask questions, and explain reasons behind positions are key to developing and achieving consensus on a plan. Shortcuts at this point could cause looping back or gridlock further down the line.
- ➔ Time boxing is often a good idea... Agenda items will mostly expand to fill whatever time is available.
- ➔ One method of giving a rough estimate of the minimum amount of time required is to calculate the total amount of time required if everyone made one 30 second comment.
- ➔ Ask yourself what other activities apart from discussions (presentation, review of documents, voting etc) will take place during the agenda point and plan time for this.
- ➔ It is a good idea to plan time at the end of the meeting for a summary of decisions and action points, outlook to the future and feedback. You might even plan in a bit more time and then have this time as leeway – if agenda points take longer than expected.

6. The people each agenda point is relevant for

It can be helpful to list the people each agenda point is relevant for. This can help the participants plan better. They then only have to attend the agenda points that are relevant to them (cf. **Structure Agenda According To Participants**).

7. Circulate the agenda to all participants well in advance of the meeting

Circulate the agenda to all participants well in advance of the meeting⁴.

This helps participants to be able to prepare in advance, ask questions and give feedback to optimise the agenda. You might even involve the participants in

⁴ Miranda Duncan, Effective Meeting Facilitation: The sine qua non of Planning, <http://arts.endow.gov/resources/Lessons/DUNCAN1.HTML> S. 3

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making the agenda. (cf. **Involve Participants in the Planning Procedure**). It also sets a businesslike tone in general.

Checklist for Agenda Structure

- Meeting date and time (begin and end!)
- Meeting place
- Meeting leader
- Overall goal of the meeting
- A list of the agenda points as follows

agenda point	approximated time (maybe start and end time)	necessary preparation	maybe: which participants this point is relevant for	maybe: owner of this agenda point.

Do Refreshments⁵

Eating is not merely a material pleasure. Eating well gives a spectacular joy to life and contributes immensely to goodwill and happy companionship. It is of great importance to the morale."

Elsa Schiaparelli, Italian designer (1890-1973)

Context

Meeting preparation.

Problem

Meetings can be tedious, stressful and take time. People lose concentration, which hinders the meeting's effectiveness. The overall atmosphere suffers. At the same time many meetings give the impression they were not prepared, that the people and their time are not valued. People who do not feel valued are not as effective.

Forces

- ◆ No one can concentrate for hours on end. Everyone needs to be able to take a break once in a while. But everybody needs a break at a different time.
- ◆ The better people feel during meetings the better they communicate and cooperate.
- ◆ Decisions made under pressure are often bad decisions.
- ◆ Low blood sugar and thirst are bad for concentration. People also get irritable when their blood sugar is low.
- ◆ It is not effective to interrupt the meetings every time some one wants something to eat or drink.
- ◆ It is important that meetings are structured – that every participant knows that the lead is in charge and will take measures to ensure the meeting is effective.
- ◆ Everyone enjoys a free meal⁶.

⁵ This pattern is closely related to the pattern „Do Food“ [DeLano/Rising]

⁶ Taken from the pattern DoFood [DeLano/Rising]

Solution

Serve light refreshments in order to create a good atmosphere in which the participants feel welcome and important.

Consequences

1. Benefits

- ☺ Refreshments help reduce the stress of meetings. This helps lessen the pressure during decision-making.
- ☺ Refreshments help create a good atmosphere.
 - Preparing good refreshments signals that you value the participants. If the participants notice that some one has spent a few minutes just to make sure they feel good, they'll appreciate it and be more open and positive.
 - Eating tasty food or drinking good drinks improves everyone's spirits.

And having a good atmosphere helps make a meeting more effective.

- ☺ Refreshments create a possibility for attendees to take a break for a few seconds without disturbing any one.
- ☺ People can concentrate better. Nobody can work well if he or she is hungry or thirsty.
- ☺ Light refreshments can help sustain energy levels (caffeine, sugar ;-)).
- ☺ Through preparing the meeting table you help create an atmosphere that helps the meeting to commence in a structured way. From the minute of entering the room every attendee notices that the meeting has been planned. This helps each participant to relax and participate as they feel that the leader has prepared and is in charge.
- ☺ People will like you organising the meeting and meeting in your facilities. So you'll be able to facilitate meetings more often.
- ☺ Everyone enjoys a free meal.
- ☺ People will like you organising the meeting and meeting in your facilities.
- ☺ The longer the meeting the more important the pattern is.

2. Liabilities and Limitations

- ⊗ Refreshments can distract – especially if they are messy to eat.
- ⊗ Someone might spend time thinking about whether or not to eat a cookie (e.g. if he/she is on a diet) and that might distract him/her from the actual subject of the meeting.
- ⊗ The meeting might become too much fun, i.e. the atmosphere gets too cosy and conversation starts drifting off to irrelevant topics. **Solution:** Fun in meetings helps people to be creative. The leader has to watch the meeting stays on course and bring the conversation back to the relevant topics when necessary.
- ⊗ If you overdo this pattern the focus of the meeting goes wrong. The table is full of lots of sweets and drinks and people spend too much time deciding what they want to eat and enjoying the food. Thus the food is the focus of the meeting and not the agenda. **Solution:** Do not have too many different types of refreshments or too many types of drinks (different juices). Have as many plates as necessary so that everyone can more or less reach one. And if there are several plates put about the same combination of refreshments on the plate.
- ⊗ People will like you organising the meeting and meeting in your facilities. So if you do not want that, you'd better watch out ;-)
- ⊗ This pattern might be overused – serving refreshments does not mean that breaks are not necessary or that meetings can be effective even if overlong. The refreshments help a meeting that has an adequate length be more effective.
- ⊗ On its own this pattern does not make a meeting effective...
- ⊗ This pattern does not work in other contexts – for example if the main goal of the meeting is to impart information very quickly (e.g. stand up meetings) the Refreshments take too much time.
- ⊗ This pattern may not be implementable in every corporate culture.
- ⊗ Constant eating or munching may disturb some of the participants.
- ⊗ This pattern does not work if the meeting is so large that you are not sitting at a table!

Do Refreshments

- ⊖ Heavy food causes people to become tired – especially if the meeting is in the midmorning or midafternoon. **Solution:** Make sure the refreshments are light and not heavy!

Implementation

Serve snacks that are tasty and of good quality. Also serve coffee, tea and water.

Arrange the snacks on a plate (or on several plates) and put them on the table so that everyone can reach them. The snacks should – of course – taste good. But they shouldn't be messy to eat or be packed in packaging that rustles when opened. It is even sometimes a good idea to add savoury biscuits or even fruit – if it is prepared in a way that is uncomplicated to eat... Another thing you might think about is putting a small chocolate candy at each seat as a welcoming gift.

You should obviously also serve drinks – coffee and water at the least. It might be a good idea to serve good quality tea or coffee (at least if there is a chance the attendees will notice the difference). It is also a good idea to place the drinks on the table so that everyone can reach them and no one disturbs the meeting by getting up and getting a refill.

Another important tip: always have appropriate cleaning equipment in the room in the case of a mishap.

Tabulate Your Minutes

A lot of people have great ideas, but nothing in the world is cheaper than a good idea with no action.

Context

Meeting preparation, during the meeting.

Problem

Often decisions reached in meetings are not put into practice or implemented. There is a danger that delegated action points have no effect whatsoever outside of the meeting. After some time not many people can remember what was decided and who was responsible (or they cannot agree what exactly was decided). Even if someone writes minutes and distributes them, this is often done quite some time after the meeting and in a long text that very few people read and is not very concise. This endangers meetings being effective since meetings are not an end in itself and so should have consequences.

Forces

- ◆ Decisions and action points that are not documented are easily forgotten, cannot be tracked for progress and are hard to pin on someone responsible.
- ◆ The chance that an action point is actually put into practice or a decision is not challenged is increased the sooner the action points and decisions are put into writing. People have the most drive to get something done immediately after being given the job.
- ◆ The chance that a decision is not questioned is greater the sooner it is put into writing because the longer it takes before the minutes are distributed the more people have forgotten who is responsible or why it was important. If the participants agree with the phrasing when it is first put into writing, chances are they will stay in agreement – unless new facts come up.
- ◆ People tend to gloss over difficult points or points where one is not in agreement (on purpose or not).
- ◆ Putting something in writing establishes facts.

Tabulate Your Minutes

- ◆ People tend to put things off if it is not made very clear they are responsible.
- ◆ People, especially leads, want to cover their asses.
- ◆ The longer the text, the less people read it.
- ◆ No one wants to spend a long time writing minutes.

Solution

Tabulate your minutes. Collect the important information during the meeting in a short, concise form for example on a prepared sheet of paper or in a document on a laptop which is structured as a table (cf. "Implementation"). The person responsible should read his recorded notes as a summary at the end of an agenda point so any one can say if they disagree or would prefer another wording.

Consequences

1. Benefits

- ☺ This way of making minutes minimises the effort of recording minutes and typing them afterwards. There is therefore a greater chance of their being distributed soon after the meeting.
- ☺ During the meeting the person writing down the minutes can clarify the wording of a decision and hereby structure the meeting e.g. "before we carry on we need a decision on...."
- ☺ Minutes that are short and concise are quick to read and digest.
- ☺ Keeping records decreases the need to revisit decisions that were made as the undisputed decisions are recorded and people know directly why. If a decision is not undisputed however, one has a better chance of noticing this when the decision is formulated concisely during the meeting and read to the participants afterwards.
- ☺ There is a better chance that action items will be done as the participants are informed shortly after the meeting in writing and in a concise way. Afterwards everybody can see at a glance what they are meant to do.
- ☺ Confidence that open and deferred issues will be addressed and not forgotten as they are recorded and are the basis for next meetings.

Tabulate Your Minutes

- ☺ Because everybody sees very clearly who is responsible the person responsible has more pressure to actually do the task (disciplining technique).
- ☺ Some one is responsible for every task.

2. Liabilities and Limitations

- ☹ This form of keeping minutes is not enough if you want to record arguments or positions.
- ☹ Being too fastidious when writing the minutes can make meetings ineffective because the participants spend ages deciding on the wording – even if it is unimportant.
- ☹ This pattern in itself does not guarantee that the minutes are distributed soon after the meeting or are actually concise – but it helps.

Tabulate Your Minutes

Implementation:

Prepare a table in advance with the following columns:

no.	category	issue/text	Relevance for following person(s)

During the meeting the keeper of the minutes just notes down the necessary information in the appropriate column.

1st column: "no."

In the first column you can give each line a number which helps when referencing or talking about the minutes.

2nd column: "category"

The person keeping the minutes decides on one of 4- 5 predefined categories for each item he notes down.

attendance: → List of the participants' names.

decision: → Wording of decisions reached during the meeting.

to dos/Action items: → Concrete action points that have to be done with a date by when they have to be done. Be careful to be precise: "Review budget with comments due next Friday noon." instead of "Review the budget very soon".

date: → Deadlines, dates etc. that are decided on during the meeting.

open issues → If issues came up that could not be decided on, then this is the place for them.

3rd column: "issue/text"

The fields under the heading issue/text are reserved for the actual information.

Tabulate Your Minutes

4th column: "relevance for following person(s)"

Often especially the to dos are not relevant for every participant. This column gives the person writing the minutes the possibility to specify who needs to pay special attention to the information stated in the specific row. By using this column every participant can see at a glance information especially relevant to him or her.

This is especially important for action items. In order for things to be done it is necessary that some one is responsible.

During the meeting the person writing the minutes doesn't have to write down all the arguments. He can always ask for clarification before noting down something in the table.

At the end of the meeting the writer of the minutes reads all action items aloud to make sure that everyone has understood what has to be done and by whom and to make sure nothing has been left out.

After the meeting the keeper of the minutes just has to type down the entries into a table. This does not take as much time as formulating a complete text.

Another possible implementation would be for the minute keeper to type the minutes directly into a computer during the meeting and have them projected via a beamer for immediate feedback.

Park Tangential Issues

If you chase two rabbits, both will escape.

Whoever wants to do great things needs to know how to limit himself; whoever wants to do everything actually wants to do nothing.

Hegel

Context

During the meeting.

Problem

Sometimes meetings get off track. At the end of the meeting the participants discover they have been jumping from pillar to post – spending the meeting talking about lot's of different issues that weren't on the agenda without reaching a decision on anything. This scenario often starts out when a question arises while discussing one point of the agenda. Everyone in the meeting starts talking about this other question and discussing it. And so time passes and no decision is reached.

Forces

- ♦ Meetings that have the goal of reaching decisions but do not actually do so or come closer to doing so are ineffective.
- ♦ Telling someone that their input is not relevant can demotivate them and other participants.
- ♦ It is very difficult to reach a decision (and mostly not effective) if you are jumping from one subject to the next spontaneously without reaching definite decisions.
- ♦ If you stick to the agenda even though an important issue is raised you might forget that important issue until the next meeting.
- ♦ If people have the feeling that their important input will not be remembered, they may spend the meeting time trying to remember to address the issue later or planning how to do so later. Because of this they may not pay so much attention to the issues discussed.

Solution

Note down tangential (i.e. issues that are not directly related to the goal of the meeting) or issues too complex to deal with at once, so they can be dealt with in a later meeting or in another way.

Consequences

1. Benefits

- ☺ Noting these issues on a separate sheet respects participants' concerns and assures them the issues will be addressed
- ☺ But you are also able to return to the original agenda and so stay focussed. This helps the meeting to be effective.
- ☺ After the meeting it is easier to remember what the other issues were.
- ☺ Important issues are remembered.

2. Liabilities and Limitations

- ☹ If it only takes one or two minutes to discuss and decide on the tangential issue then it makes every thing more complicated to use this pattern.
- ☹ If you do not actually follow up on the issue and organise a discussion on or address it later, then in time this pattern won't work because the participants will insist on discussing the issue in the meeting.
- ☹ There are times when the original issue that was on the agenda for the meeting can only be reached if the new topic is discussed and a decision on this is reached. Then this pattern isn't constructive cf. context. It is better to change the issue of the meeting and discuss the original issue later. (If you're not sure → use the pattern **Switch to the Meta-Level**)

Park Tangential Issues

Implementation

Create a separate flip chart page for issues raised that are important but either tangential or too complex to deal with during the meeting. State the fact that the issue is not on the meeting's agenda. Be friendly and appreciative - say that it is good the issue was brought up but as it is not part of the agenda you would like to postpone the discussion to a later date. Then write down the issue on the flip chart and explain that this is a reminder for important issues raised in the meeting that will be discussed at a different time.

Of course, you do not necessarily have to jot down things on a flip chart - you can write them down on a separate piece of paper.

Another possibility would be to record the deferred issues in the table used to record the minutes (cf. **Tabulate your Minutes**).

Switch to the Meta-Level

Great meetings don't just happen automatically – they're designed

Context

During the meeting.

Problem

Sometimes meetings just leave the original agenda – either by participants jumping from pillar to post or by emotional issues. At other times the meeting just comes to a stand still and it seems as if no decision can be raised. Maybe at other times the participants in the meeting are having a lot of fun reminiscing and telling anecdotes – but this doesn't really further the meeting goal. At other times a participant says that another important issue that is not on the agenda has to be decided directly. In all of these scenarios the meeting often gets more chaotic by the minute.

Forces

- ◆ Effective, focussed meetings are good.
- ◆ It is not always easy to get people to do what you want just by using your authority. They may do so – but often grudgingly. This doesn't further a constructive atmosphere.
- ◆ People are more easily led if they feel that their issues and interests are respected and considered.
- ◆ Leaders often want to have the feeling and the feedback that they are good leaders.
- ◆ As a leader you often don't have enough information to decide whether an issue needs to be dealt with directly.
- ◆ People don't only function on the factual level – you need to reach them on the emotional level as well to be effective.

Switch to the Meta-Level

Solution

Transfer the meeting to a meta-level for a moment. Take a time-out and spend a few moments talking to the group about the group situation they are experiencing.

Consequences

1. Benefits

- ☺ Through transferring the meeting to the meta-level you can make a break in a chaotic discussion and help structure the meeting. This gets the meeting back into a constructive, goal-orientated atmosphere which is satisfying to the participants.
- ☺ By letting the attendees participate you keep them motivated; they do not have the impression that you're only interested in using your authority but feel that their concerns have been respected.
- ☺ The meeting commences in a focussed and orderly fashion - which shows you as a leader have done a good job.
- ☺ It is possible to get feedback from the participants without loosing face as you are still in the position of authority - you as a leader are still moderating the meeting.

2. Liabilities and Limitations

- ☹ You need courage.
- ☹ You need to watch out that you do not spend the rest of the meeting on the meta-level.

Switch to the Meta-Level

Implementation:

If, for example, a tangential issue arises that is not on the meeting's agenda. You are not sure if you have to decide on the tangential issue as a prerequisite to deciding on the original issue. You then transfer the meeting to the meta-level. You ask the question "Is it possible to reach a decision on the actual issue before deciding on the issue that has come up?" Watch you do not spend too much time on the discussion.

If the discussion of the tangential issue is a prerequisite to deciding on the original issue, you then ask yourself (or the group) "Do we have enough information now to decide on the issue that has arisen?" If not, the meeting should be adjourned. Otherwise the issue can be decided. But clarify that you are adjourning the actual issue - until later in the meeting - or if there isn't enough time - until another date.

If you can decide the original issue without discussing the new issue then use the pattern **Park Tangential Issues**

Outlook

Outlook:

The presented patterns are just a small part of patterns that can be used to make a meeting effective. There are many more patterns that can be used to this effect. Some of them are collected in the following diagram. The diagram orders the patterns by the phase in which they are used.

Preparation	Actual Meeting	Post processing	
Don't Meet			
Do Refreshments			
Take Time to Prepare			
Plan Environment			
Develop a structured Agenda			
Involve Only Relevant Participants			
Structure Agenda according to Participants			
Involve Participants in the Planning Procedure			
			Define Time Boundary/ 90-Minute Meeting
			Agenda Counts
			Be Early
			Define Moderator
			Be a Moderator with Authority
			Start with the Goal
			State the Process
			Start and finish on time
			Park Tangential Issues
			Switch to the Meta-Level
			Appoint a Recorder
			Appoint a Timekeeper
	Get Feedback		
	Do Brainstorm		
		Tabulate Your Minutes	
		Get Feedback on Your Minutes	

There are obviously different ways of structuring patterns for leading effective meetings.

Another possibility would be to structure them according to the kind of problems they solve (i.e. organisational or social (How do I deal with people

Outlook

with a hidden agenda?) or communicational/moderational). Another possible structure would be to structure the patterns around big patterns, for example one big pattern could be "Structured Agenda". There would then be several smaller patterns stating how to implement the big pattern (i.e. "clear objective", "participants influence agenda", "prepared agenda", "agenda counts", "time allocation", "spontaneous agenda").

These would be further steps when more patterns are collected. As stated in the introduction -this paper is work in progress...

Outlook

Overview of the patterns mentioned:

Name	Problem	Solution
Don't Meet	You're responsible for organising a meeting. While thinking about the agenda you realise that the goals could be met more effectively through other communication forms.	Do not meet.
Take Time To Prepare	You're responsible for organising a meeting. You want the meeting to be effective and goals to be reached. At the same time you do not have a lot of time. You think you could save preparation time...	Take time to prepare. Neglecting preparation costs effectiveness during the meeting.
Plan Environment	You want the meeting to be effective.	Plan the environment. What tools do you need (overhead projector, beamer, flip chart, pens, paper...). Organise to have everything there.
Involve Only Relevant Participants	You want the meeting to be effective and reach a goal. You do not want the participants to feel they are wasting their time.	Involve Only Relevant Participants
Structure Agenda According To Participants	You want the meeting to be as effective and as time saving as possible. You will probably have busy people attend the meeting. They do not want to sit through agenda points that are of no interest to them.	Organise the agenda according to the participants. Group the agenda points according to relevance to the different participants. Then a participant can leave after all points that are relevant to him have been addressed and other participants can join the meeting later for

Outlook

		later points relevant to them.
Involve Participants In The Planning Procedure	You want the meeting to be as effective as possible. If people do not identify with the goals and objectives and subjects of a meeting they tend not to be as constructive.	Involve participants in the planning procedure. Send a copy of the proposed agenda round to all participants and ask for feedback.
Define Time Boundary/ 90-Minute Meeting	You want people to attend the meeting with a good feeling because this is important for an effective meeting. People are demotivated if they have the feeling the meeting might take forever and there is no clear time when it will end. Also people cannot concentrate for a long period of time.	Define time boundary. Let everyone know before the meeting how long the meeting is going to take. If possible limit the meeting time to 90 Minutes.
Agenda Counts	You want the meeting to be structured.	Keep to the agenda. Do not be too quick to throw an agenda over board. If it is necessary to change the agenda, make this explicit and then keep to the new agenda.
Be Early	You want the meeting to be structured and well organised.	Be early. Arrive in the room early. You then have time to arrange things, improvise as necessary and are not hectic when the other participants arrive and hereby create a focussed atmosphere.
Choose A Moderator	You want the meeting to be structured. But meetings without leadership tend to be unstructured. At the same time you want to	Choose a moderator who is not the leader of the meeting. The moderator is responsible for moderating the meeting and seeing that the

Outlook

	participate in the meeting and this is difficult in addition to moderating the meeting.	agenda is kept and the discussions are held in an orderly fashion.
Be A Moderator With Authority	When people discuss problems they can become emotional. Also some of the participants might be dominant and enjoy hearing themselves speak.	Be a moderator with Authority. Make your role and your expectations clear at the beginning of the meeting.
Start With The Goal	You do not want the meeting to be unfocussed.	Start the meeting with a short statement of the goal or objectives.
State The Process	You want the meeting to be structured.	After stating the goal spend a few moments to explain the process.
Start And Finish On Time	You want people to be motivated when they come to your meetings. You do not want people to fidget around or feel their time is being wasted.	Start and finish on time.
Appoint A Recorder	You want the decisions made in the meeting to be recorded. At the same time it is difficult to moderate the meeting and take minutes at the same time. You also want people to contribute as much as possible.	Appoint a Recorder
Appoint Timekeeper	A You do not want the meeting to drag. You want to stay on schedule. You all participants to develop an awareness of the importance of time.	Appoint a Timekeeper, who says when time is up for a specific point or when there are only a few more minutes left.
Get Feedback	You want to optimise your meetings. While leading or moderating the meeting it is difficult to observe the meeting and think of things that	Spend the last 2-3 minutes for a quick feedback round at the end of the meeting.

Outlook

	might have been done in a better way.	
Brainstorm	You need creative solutions for solving a problem.	Spend time in the meeting brainstorming. While you are brainstorming every idea is added to the list without judging it - as judging restrains creativity.
Get Feedback On Your Minutes	You have finished the minutes. But you do not want discussions to start in a few weeks about whether the minutes were correct or not.	Get feedback on your Minutes. When sending round the minutes in the first version - ask for different opinions or feedback. Even better - if possible review the minutes at the end of the meeting.

Acknowledgements

I would like to thank my shepherd, Michael Stal, for his valuable suggestions that helped to improve this paper considerably, for his encouraging way of putting things that helped me stay really motivated while improving the paper;-) and for the time he invested.

I would also like to thank my writer's workshop at EuroPLoP 2005 (Lise Hvatum, Keith Braithwaite, Joe Bergin, James Noble and Charles Weir), for the encouraging and the critical feedback.

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