



Effective Meetings #3 Suggested Meeting Guidelines

We have found that a key to improving the effectiveness of meetings is to have a set of agreed on and rigorously enforced guidelines¹. Conversely, without such guidelines, meetings tend to be unstructured and either under- or over-managed. As a result, such meetings are not only unsatisfying to the participants and the leader, but they are usually ineffective as well.

Consider the Meeting Participants to be Customers

If you are the Meeting Leader², we suggest you consider the meeting as a product you are providing customers, and the participants are your customers. Consider that the meeting participants are paying for the meeting results with their time and effort. Your goal would then be to have each attendee be able to say at the end of the meeting that the benefit they individually received was worth the cost.

In this article we suggest a set of meeting guidelines which have demonstrated considerable value for our clients and ourselves.

Enforceable Guidelines

- *Meeting Manager:* Have one person at each meeting whose only job is to manage the meeting process for that meeting. This person does not participate in any content discussion. This "Meeting Manager" should be perceived to be neutral to the outcome, committed only that there is an outcome satisfying to the group. For our company staff meetings we rotate our Meeting Managers among all participants in a regular cycle.
- *Recorder:* Have a person designated to keep a written record of what promises were made (what, who, and by when), what decisions were made, and what items were put aside to be addressed at later meetings. This separation of duties frees the Meeting Manager to focus exclusively

¹ See *Effective Meetings #2: Getting Started: Have a Meeting on Meetings*.

² The Meeting Leader is the person who is desirous that the intended results of the meeting be produced. Typically the Meeting Leader calls the meeting, designs the agenda, and participates in the content discussion. The Meeting Manager manages the process of the meeting, stays out of any content discussion, and is accountable that the meeting agenda be accomplished. See a forthcoming *Effective Meetings* article on Meeting Roles.



on managing the meeting. For our staff meetings the Recorder for a meeting is the Meeting Manager for the next meeting. This helps him or her to be better prepared to manage that meeting.

- *Operate with integrity:* Once a guideline is made, stick to it. Any significant overlooking or breaking of a guideline will make that guideline (and possibly all the other guidelines) ineffective. If the Meeting Leader or Meeting Manager break a guideline, then that guideline is potentially rendered particularly ineffective.
 - As Meeting Leader or Meeting Manager, be an example of integrity in your actions.
 - No one is ever perfect. When a guideline is broken, the important behavior is acknowledging to the group that a guideline was broken (instead of ignoring it), acknowledging and taking responsibility for breaking the guideline (instead of giving excuses and reasons as if they were the equivalent of keeping the guideline), and let the group know you will make a greater effort in the future to adhere to it (tell participants what correction you will make so that the error won't happen again).
- *Follow the agenda:* Rigorously follow the agenda, especially meeting start and stop times and the time allocated to each agenda item. An agenda item's allocated time can be changed only with the approval of the entire group, accompanied by resolution of the impact of the change on the remaining agenda items.
- *Stick to the agenda topic:* Someone neutral (typically the Meeting Manager) must be the arbiter of "on topic" or not. Off topic issues can be recorded on a "Parking Lot" list.
- *One person talks at a time:* It is very difficult to listen actively when speaking. In addition, people consider it rude for others to whisper while they are talking. In general, each person who speaks addresses the group as a whole rather than speak to others as individuals.
- *Documentation in advance:* All documentation for decisions must be provided to participants sufficiently in advance for everyone to be fully prepared for the meeting. As a rule-of-thumb, we recommend that documentation be distributed no less than one week prior to decision-making meeting. If the needed documentation is not made available in a timely manner, the associated agenda item is removed from the agenda.



- *Decision process:* The process for making decisions, which may vary from item to item, is always specified on the agenda³. For example, some items may require consensus and for others, a majority vote may be sufficient.
- *Periodic Review:* Guidelines are regularly reviewed (approximately every 6-12 months), particularly for periodic meetings such as monthly staff meetings. Continue to incorporate guidelines that work for you and either eliminate or change other items, as appropriate.
- *Post guidelines:* Post the current Guidelines in the meeting room and find opportunities to refer to them often.

Additional Guidelines

In addition to the above, it may be useful to have guidelines concerning:

- Modifying the agenda after publication or at the meeting.
- Authority of the various meeting roles, such as the Meeting Manager.
- Timely publication of the minutes.

Unenforceable (but useful) Guidelines

- Be concise.
- Everybody participates.
- Listen with an open mind.
- Everyone is responsible for the success of the meeting.

Summary

As Meeting Leader, consider the meeting attendees to be your customers who should leave the meeting feeling that they have received more value than the cost they paid with their time. Operate with a set of enforceable guidelines that support that outcome.

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³ See *Effective Meetings #6: Selecting a Group Decision-Making Process*.