

Managing & Leading Great Staff & Team Meetings (w/ Virtual)

Randy Dean, MBA
The E-mail Sanity Expert ®
<http://www.randalldean.com>



1

A Little Backstory ...

- Obsessed with a better use of time & productivity
- One of my biggest pet peeves ...
- Every type of company, every type of job ...
- However, there were exceptions



2

Agenda

- Why do we have meetings?
- Reasons meetings “go bad”
- General strategies for effective meetings
 - Planning an effective meeting
 - Running an effective meeting (including virtual)
 - Planning for follow up and follow through
- A Recommended Exercise

3

Why Meetings?

- When managed properly, a critical mechanism for long-term business success
 - The best tool for making informed decisions within and across teams & department areas
 - Allows multi-person teams to plan and manage important projects more effectively
 - Good for efficient distribution of work assignments among team members
- . . . But very often become expensive productivity killers

4



Why do
meetings
“go bad”?

5

Signs you may be in an “Off the Rails” Meeting

- There's no agenda and/or no clear meeting leader
- If there is an agenda, it isn't followed
- Attendees cannot state clearly why the meeting is taking place (lack of clear goals/vision/purpose)
- There are unnecessary people attending the meeting
- People arrive late and leave early
- The meeting is interrupted by visitors/phone calls/people checking email/reading/other distractions
- The meeting degrades into a non-constructive “complaint” session

6

A Tale of Two Meeting Leaders



7

As a meeting leader, you are “on stage”



Perhaps no better place to show your competence and capability



Also, no better place to show your weaknesses



Can build (or damage) team loyalty/unity



Can enhance (or destroy) top management support, as well as belief in you personally

8

Many of the Same Rules Apply ...



Formal meeting?



Preparation is key ...

Goal/Objective/Desired Outcome

Agenda

Courtesy Rules?

Right People (and Only the Right People)

Take it to Another Level ...

9

A Best Practice

- Put lots of care into his meetings
- Never entered without a plan
- Always gave advance notice – often personal
- Had snacks and coffee; room had supplies
- Kept time and agenda under control
- Was VERY smart – knew how much it benefited him



10

Many of the Same Rules Apply ...



ADVANCE PREP?



DOCUMENTS/FILES



ADVANCE
RESEARCH



WITH VIRTUAL –
GET OUT INVITES &
INSTRUCTIONS

11

Virtual Tip: May want to do a practice session ...



Give people an initial test run



Let them play a bit...

Test log ins/connections
Test audio/video
Test document sharing
Test chat and other features
Troubleshoot if needed

12



Option 1: Do You Even Need a Meeting (or Need to Attend the Meeting?)



Remember, most people would rather not attend a meeting -- they have work to do!



Need a tangible business reason for holding any and every meeting



Purpose needs to be clear



Expected outcomes should be anticipated



If they are clear and obvious -- just assign the work!

13

"I just attended another meeting that could have been handled by an e-mail."

Sort of funny ...

14

Meetings are NOT “Free”:

A Sample Meeting Cost/ Value Calculation

- Start with the amount of time spent in meeting in hours. Multiply by:
- # Senior Staff @ \$200/hr = _____
- # Mid-Managers/Professionals @ \$125/hr = _____
- # Jr. Mgrs./Admin. Staff @ \$95/hr = _____
- + cost of materials, snacks, beverages,
- room rental, electronic/telecomm, etc. = _____
- = TOTAL COST OF MEETING: _____
- Remember – it is MORE than just the cost of time!

15

“Lots of folks
confuse bad
management with
destiny.”

– Kin Hubbard

16

General Strategies for Effective Meetings

17

- The classic "Update" meeting: getting everyone informed and on same page? (*Caution!*)
- A meeting where the existing problem, issue, or opportunity is clearly understood, and solutions should be relatively self-evident?
- A meeting where the problem, issue, or opportunity is not well understood?
- A meeting where you need to generate ideas to take advantage of emerging issues or opportunities (a brainstorm session)?

First Question:
What kind of
meeting is it?

18

Get the Right People in the Room

- This is a good tip for any meeting type!
- In this case, you want those most likely to help get an understanding of the problem/issue/situation
- Diversity may help – age, experience, education, gender, ethnicity – etc.
 - Brings lots of different viewpoints to table
 - ... but may may meeting take longer!



19

- Let's talk introvert/extrovert/ambivert:
 - Extrovert: "I'm so glad all of you are here!"
 - Introverts Unite! (Privately, in their own homes.)
 - Ambivert: "It was truly great seeing you. Now, please go away."
- Humor aside: Have to work to get input from all participants, not just the extroverts/dominant

Get the Right People in the Room

20

The Checklist

- What is the purpose of the meeting?
- Who will lead the meeting?
- Is there a defined, well-planned agenda?
- Is there a set start and **end** time?
- Have the right people been invited and confirmed?
- Do they all know why they are attending and what information or expertise they are expected to bring?
- Have they been given adequate time to prepare?
- Have you as meeting leader given yourself time to prepare your thoughts/plans for the meeting?

21

		
 Virtual? What about dress code???		

22

The Three "D's" of an Effective Meeting

- *Meetings simply are a place where work should be:*
 - Discussed
 - Decided
 - Distributed

23

You Might Like This ...

Meeting Name, Date, Time

Agenda:	Discussion	Decision	Delegation	Due
Agenda #1				
Agenda #2				
Agenda #3				
Agenda #4				

24

Step 3: Manage the Meeting

- Are the right people (and only the right people) in attendance?
- Have ground rules been set for attendees (late arrivers, "rabbit trailers", phone callers, typists, interrupters, side conversations, etc.)
 - Create a formal "Meeting Etiquette" document?
- Has an agenda manager/timekeeper been assigned?
- *An interesting fact about sticking to agendas*
- Run the meeting



25

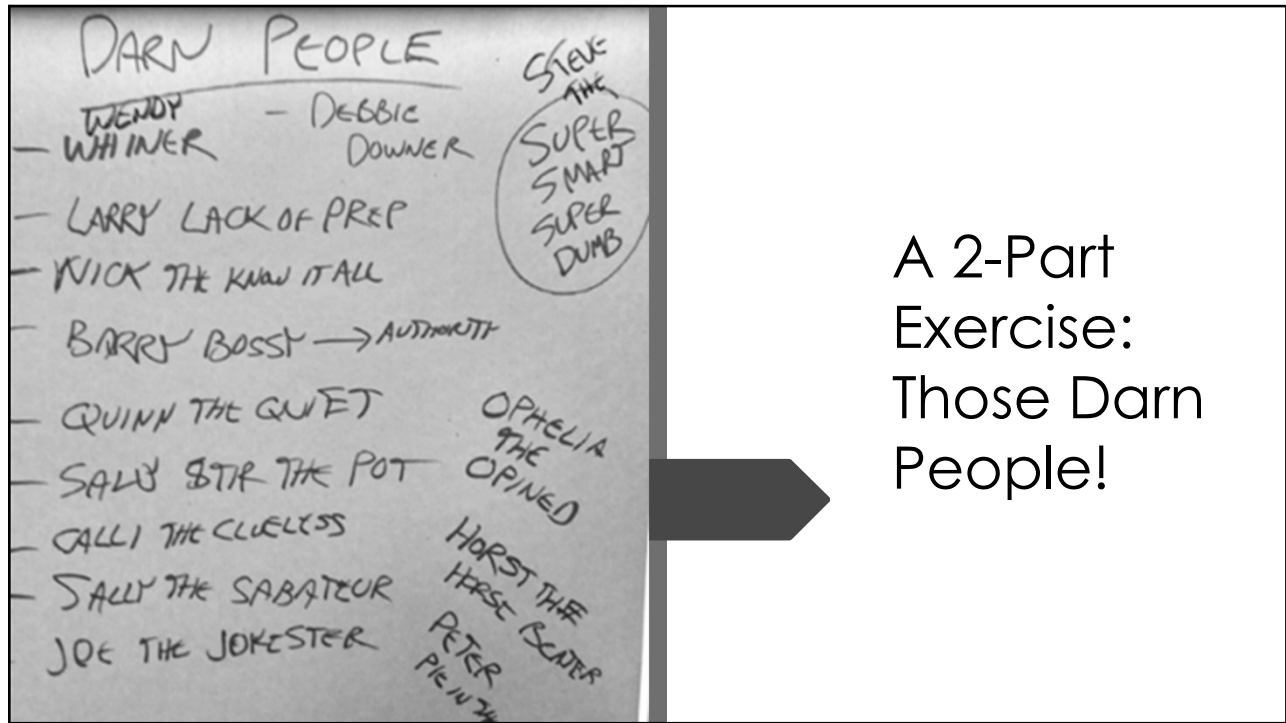
Virtual Courtesy



- Get log in instructions out early
- Log in 5-10 minutes prior to session
- Test audio when arrive – announce self
- Mute line when not speaking? (Very important when lots of people)
- Silence your phone (maybe put away?)
- Headphones/ear pods? (Noise cancel?)
- Eyes on the screen
- People can hear/see you typing!
- *My wife says "Faces really help. Makes more interactive, keeps your attention, helps share emotion."*



26



DARN PEOPLE

- WENDY WHINER - DEBBIE DOWNER
- LARRY LACK OF PREP
- NICK THE KNOW IT ALL
- BARRY BOSSY → AUTHORITY
- QUINN THE QUIET
- SALLY BTR THE POT
- CALLI THE CLUELESS
- SALLY THE SABOTEUR
- JOE THE JOKESTER
- OPHELIA THE OPINED
- HORST THE HERSE SCATER
- PETER PLEIN
- STEVE THE SUPER SMART SUPER DUMB

A 2-Part Exercise:
Those Darn People!

27

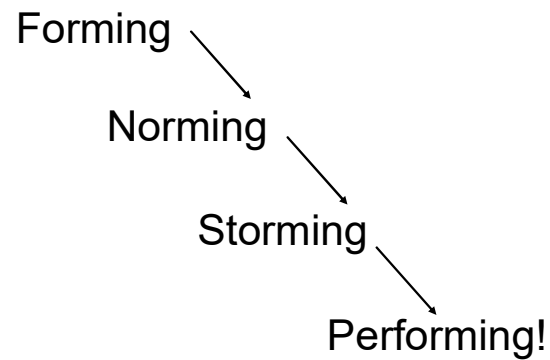
Step 4: Ending the Meeting

				
Check that all agenda points have been properly covered	Query for consensus/ resolution/ understanding from attendees	Have attendees received assignments with deliverables and due dates at the end of each meeting?	Have specific notes from meeting been shared with attendees post-meeting?	Ask for meeting feedback
	Possible smaller group breakouts? Avoid e-mail "downloading" – not as efficient as formal or informal "huddles" or even phone conversations			

28

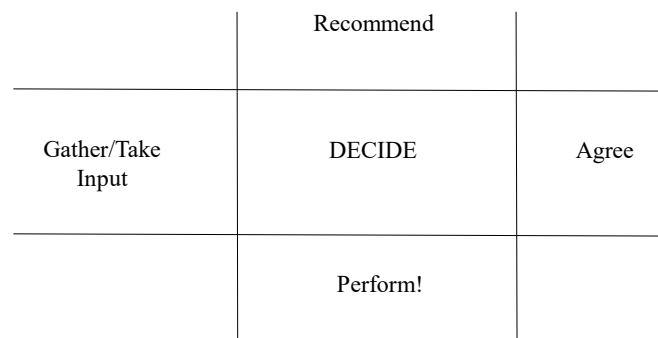
Tuckman's Stages of Group Development

A Couple Tools
For Ongoing
Meetings/Project
Teams/Committees



29

Bain's RAPID Model For Decision Making



30

Two Meetings Every Ongoing Team Should Consider ...



#1. A Meeting on How To Run Better Meetings

Ground Rules/Common Courtesy
Preparation
Advance Notice
Virtual Notice



#2. A Meeting on Which Communications Tools to Use When & Why

E-mail, Voice Mail, Text, Phone, IM, Virtual Meeting, Face-to-Face, Formal Group, Video Chat, etc.

31

A Reminder – Use this for Meeting Notes!

Meeting Name, Date, Time

Agenda:	Discussion	Decision	Delegation	Due
Agenda #1				
Agenda #2				
Agenda #3				
Agenda #4				

32

The “One Minute Manager” Model

- **Short, impromptu meetings often more productive than planned formal meetings**
 - Usually happen due to arising opportunity / crisis / change
 - Get 2-4 active people together quickly
 - Jump on a Zoom or Teams call
 - Huddle on new information – 1-2 topics max
 - Adjust plans according to information
 - Make plan for quick follow up
 - Take ACTION!
- Reference: “The One Minute Manager” by Ken Blanchard & Spencer Johnson

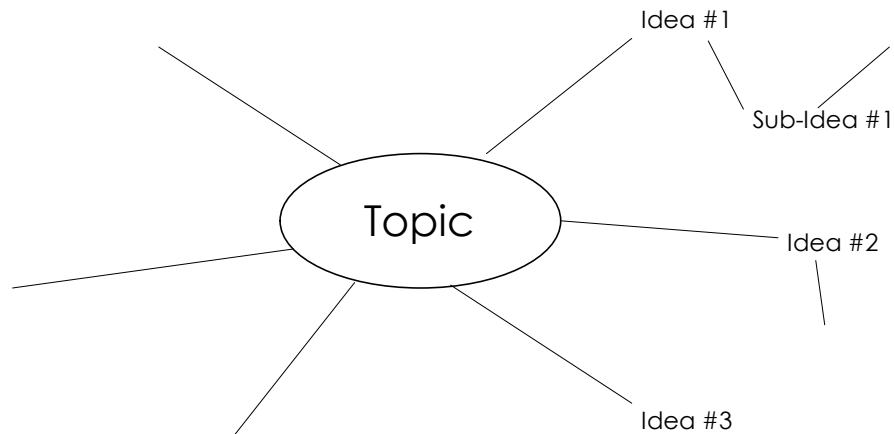
33

What about a brainstorm?

- **Meetings can be an excellent tool for a quick brainstorm session**
 - Quickly get several diverse people together/on video call
 - Remember RULE #1 of a brainstorm!
 - Have an assigned note taker (Mind Map?)
 - Whiteboard option in Zoom or just a shared Word/Google doc or PowerPoint file on screen might work great!
 - GO!

34

Mind Map Brainstorm?



Source: **Tony Buzan** – *Mind Map Mastery*

35

Thank you for your time!

To find out more about
Randy Dean, MBA and his programs,
including full-length online
streaming and webinar programs,
visit:



Randy Dean, MBA
The E-mail Sanity Expert®

<http://www.randalldean.com>

You can also get a whole series of "Productivity PDF Tip Sheets" by Randy on time, e-mail, and related tech management – send an e-mail to randy@randalldean.com and put "Programs PDF" in the subject line.

36