

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

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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



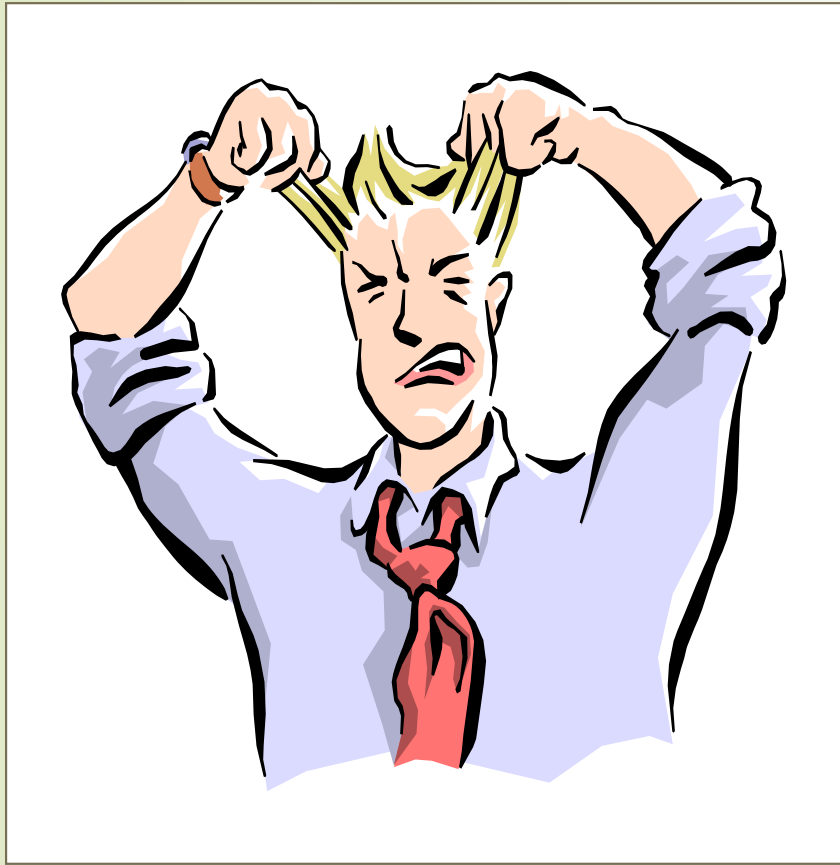


Agenda

- 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

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

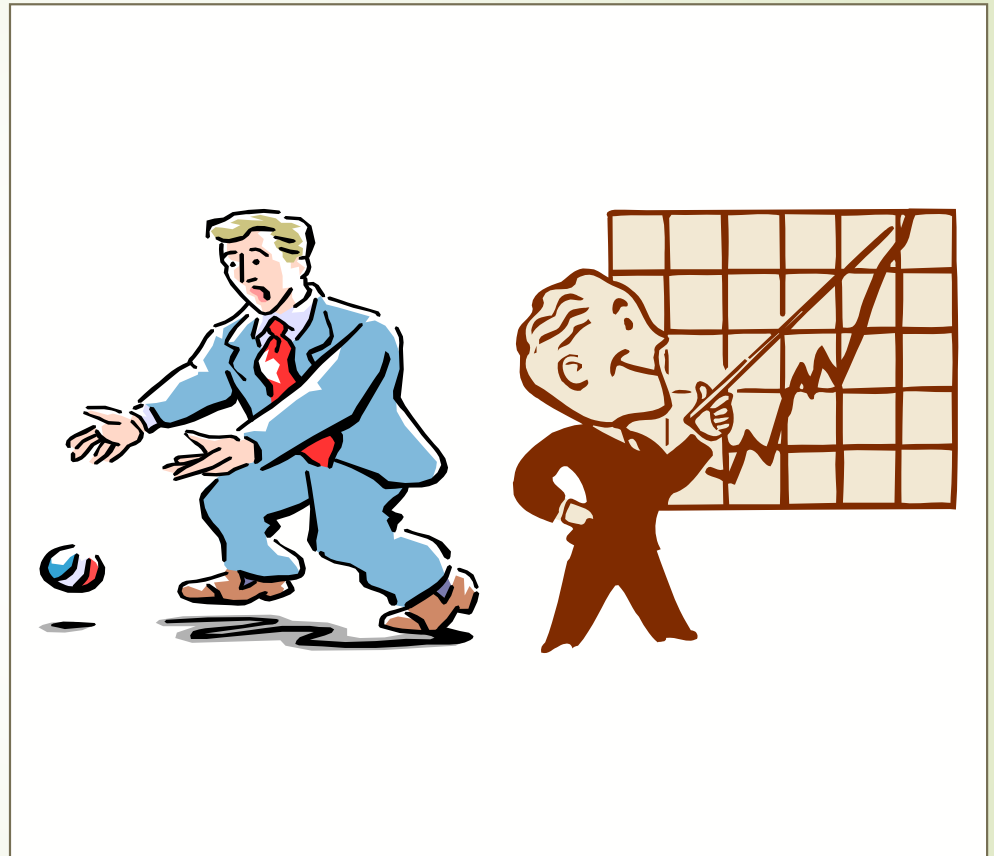


Why do
meetings
“go bad”?

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

A Tale of Two Meeting Leaders





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

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 ...

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



Many of the Same Rules Apply ...



ADVANCE PREP?



DOCUMENTS/FILES



ADVANCE
RESEARCH



WITH VIRTUAL –
GET OUT INVITES &
INSTRUCTIONS



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



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!

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

Sort of funny ...

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!

“Lots of folks
confuse bad
management with
destiny.”

– Kin Hubbard

General Strategies for Effective Meetings



- 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?

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!

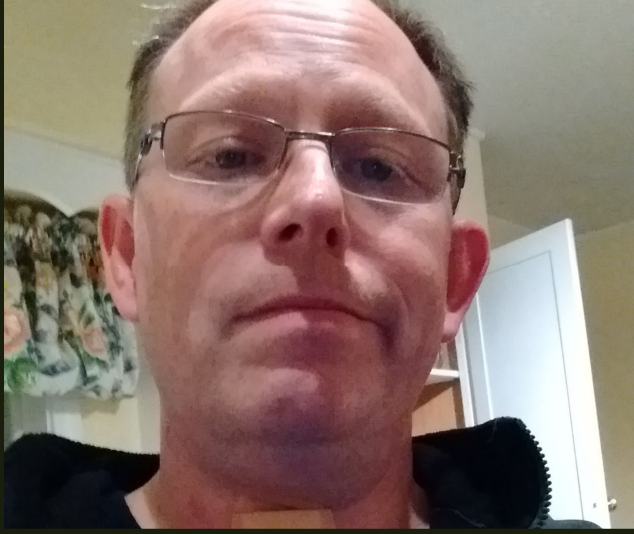


- ▶ Let's talk introvert/extrovert/ambivert:
 - ▶ Extrovert: "I'm so glad all of you are here!"
 - ▶ Introverts Unite! (Privately, in their own homes.)
 - ▶ Ambivert: "It was truly great seeing you. Now, please go away."
- ▶ Humor aside: Have to work to get input from all participants, not just the extroverts/dominant

Get the Right
People
in the Room

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?



Virtual? What about
dress code???





The Three “D’s” of an Effective Meeting

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



You Might Like This ...

Meeting Name, Date, Time

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

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



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.”*



Step 4: Ending the Meeting



Check that all agenda points have been properly covered



Query for consensus/ resolution/ understanding from attendees

Possible smaller group breakouts?

Avoid e-mail "downloading" – not as efficient as formal or informal "huddles" or even phone conversations



Have attendees received assignments with deliverables and due dates at the end of each meeting?



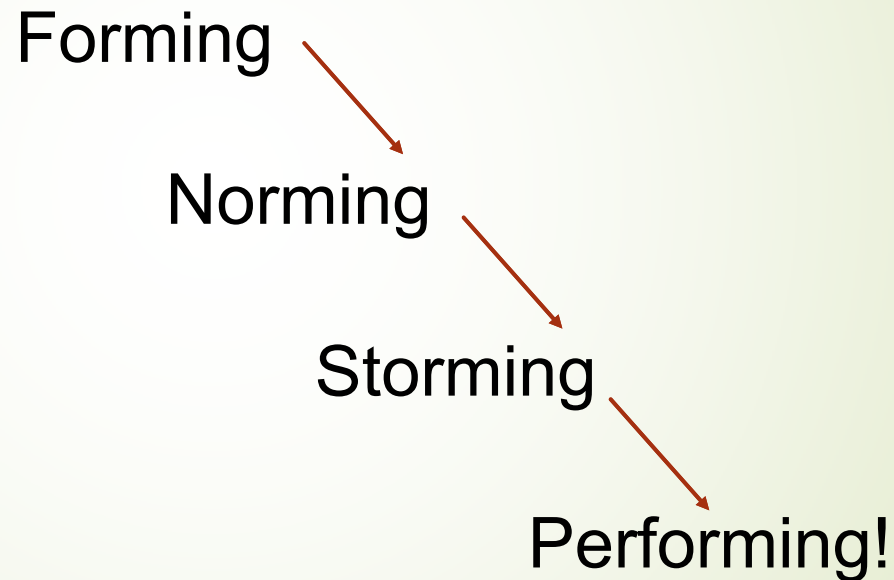
Have specific notes from meeting been shared with attendees post-meeting?



Ask for meeting feedback

Tuckman's Stages of Group Development

A Couple Tools
For Ongoing
Meetings/Project
Teams/Committees



Bain's RAPID Model For Decision Making

	Recommend	
Gather/Take Input	DECIDE	Agree
	Perform!	

A Reminder – Use this for Meeting Notes!

Meeting Name, Date, Time

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The “One Minute Manager” Model

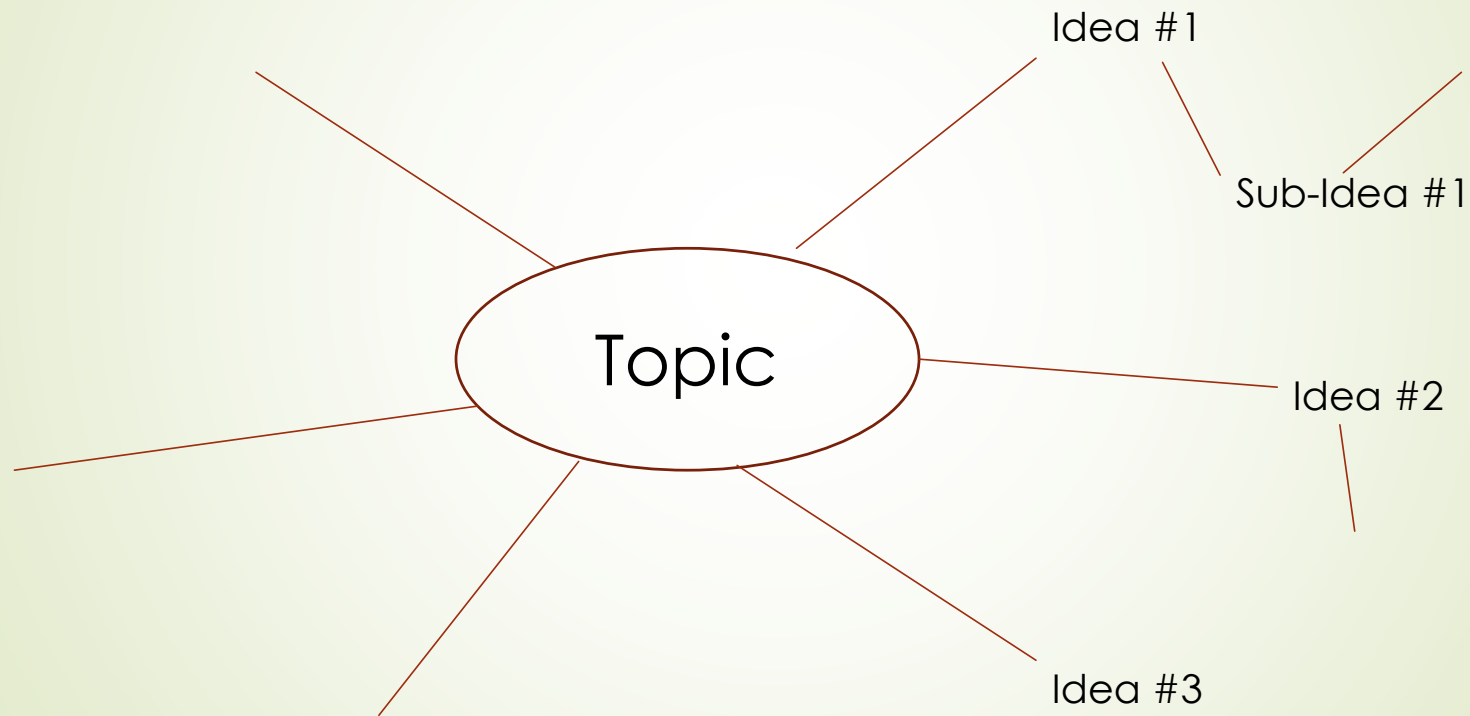
- **Short, impromptu meetings often more productive than planned formal meetings**
 - Usually happen due to arising opportunity / crisis / change
 - Get 2-4 active people together quickly
 - Jump on a Zoom or Teams call
 - Huddle on new information – 1-2 topics max
 - Adjust plans according to information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

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!

Mind Map Brainstorm?



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

Thank you for your time!

To find out more about
Randy Dean, MBA and his programs,
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streaming and webinar programs,
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