THE BUSINESS MEETINGS SOURCEBOOK:

A Practical Guide To Better Meetings And Shared Decision Making

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TABLE OF CONTENTS

Listening
Asking questions
Thinking
Making presentations
Answering questions
Converting negativity into affirmative needs
Giving and receiving feedback
Celebrating successes
Off-line interactions and consensus building
Helping out
Managing your hot buttons
Asserting yourself without getting angry
Turning failures into learning opportunities
Taking minutes

Chapter 14: Landing a meeting

Chapter 15: Post meeting activities
Preparing and circulating the minutes
Taking follow-up actions
Analyzing the meeting
Using meeting assessment checklists: The 6 Ws

Chapter 16: Virtual meetings
Advantages and disadvantages of virtual meetings
General tips for virtual meetings
Building consensus by correspondence
Building consensus by teleconference calls.
Building consensus by videoconferences.
Building consensus by electronic meetings

Chapter 17: Contentious Meetings as Opportunities
Identifying the causes of controversies
Identifying the costs of poorly managed controversies
Identifying the benefits of well managed controversies
Reducing the occurrence of controversies
Detecting controversies at an early stage
Preventive and proactive planning for contentious meetings
Issue management tools for contentious meetings
Process management tools for contentious meetings

Chapter 18: Troubleshooting Guide
Diagnosing meeting ailments
Principles for curing meeting ailments
Curing facilitation ailments
Curing agenda ailments
Curing time management ailments
Curing commitment level ailments
Curing protocol and etiquette ailments
Curing discussion quality ailments
Curing logistics ailments
Benefiting from incurable meeting ailments

PREFACE

I began serving as a professional meeting facilitator and management consultant in 1984, and have been fascinated by the complexities of this work ever since. As my practice evolved, my clients and seminar participants presented me with a seemingly never-ending set of questions and challenges to address. This process has been enlightening and has forced me to continually develop my thinking.

My purpose in this book is to pass on to you the practical lessons I've learned and the tools I've developed through my facilitation, consulting and training assignments. The tools I present should be immediately usable by the corporate or civic leader who facilitates or participates in meetings and who leads shared decision making processes.

So what will this book do for you? Naturally, the first set of tools you might expect from a meetings book relates to planning and managing meetings, and, yes, this book gives you plenty of them. However, if this was all I gave you, my advice would be of limited use, and would address only a part of your task.

To consider your leadership challenge more holistically, we must first consider the tools required to build a healthy foundation for shared decision making. Without this foundation, truly meaningful meetings would be impossible to achieve.

Just what do I mean by "a foundation for shared decision making" and why is it important? Here are four examples of run well meetings, where the outcomes are undermined by a flawed foundation:

First, let's consider strategic planning workshops. Such sessions are invariably very exciting and invigorating. Participants leave optimistic and confident and ready to make changes in their organizations. But how long does this enthusiasm last? I make it my habit to contact past clients to check how much of a difference a workshop made. Often the answer is enthusiastic: "Yes, we are putting the ideas to work, and the workshop has been a real benefit". But other times the answer is: "Yes, it was a great session. But when we tried to persuade our Chief Executive Officer to implement the ideas, he would have none of it". This begs the question: What tools do you need to 'manage upwards', to ensure that your meetings and decisions are taken seriously?

Second, let's consider a management team which meets and agrees on policy changes that profoundly affect employees. Upon attempting to implement the changes, managers encounter resistance by staff. Some of them indeed follow their leaders obediently. But many follow reluctantly. Others undermine the changes, and others leave. Which leads to this question: What tools do you need to manage 'downwards', so those who will implement the decisions made in your meetings will do so willingly and enthusiastically, because they want to and not because you tell them to?

Thirdly, let's consider a government agency which decides to consult community stakeholders about a proposed project. Community consultation meetings are productive, but part of the consensus cannot be responsibly implemented and is therefore rejected. Upon learning about this, stakeholders get angry and go to the media with allegations of tokenism and dishonesty. They thought that their input was binding, and were never told of it being only advisory. Yes, the meetings were productive, but the overall result was negative. Which leads to this question: What tools do you need to ensure that expectations of external stakeholders are consistent with yours?

And finally, let's consider a committee which is given a loosely defined mandate. It then holds productive meetings, conducts research, makes commitments, and spends money. It comes back a few months later with what it believes to be sound recommendations, only to be criticized for acting irresponsibly, spending money recklessly, and exceeding its authority. Which leads to this question: What tools do you need to make sure your committee's mandate is sound, accountability is maintained, disputes do not develop, and time and resources are not squandered?

Responding to the questions raised in the above four examples, this book gives you tools to build a solid foundation for shared decision making. These tools will help you manage 'upwards', 'downwards', and 'sidewards' and make your group's consensus building efforts more meaningful.

Having given you the tools to build a healthy foundation for shared decision making, my next step is to give you practical tools with which to plan and run good meetings. The challenges you may face are domination by outspoken members, an inappropriate focus, an adversarial climate, and more. Let me elaborate on some of the meeting management tools that this book offers.

A frequent frustration with meetings is that 'he playing field is uneven' Talented but unassertive individuals just won't speak up. On the other hand, experienced and outspoken members dominate and take up most of the time. The result? People leave a meeting frustrated and dissatisfied, and, in the absence of their input at the meeting, narrow-sighted decisions are made. What tools do you need to 'even the playing field', rein in' dominant members, and capitalize on the talents of quieter ones? How do you convert passive spectators into active and empowered contributors?

Another serious meeting ailment is squandered time: 90% of a meeting time is often spent on minutiae and only 10% on significant and relevant issues. Items which have little or no relevance to the group's mandate are on the agenda. What tools do you need to focus a meeting on the things that are significant and make the meeting truly beneficial? How do you ensure that meeting time is properly allocated and spent?

Sometimes you find a meeting becoming a war zone, with members entrenched in adversarial positions, attacking, accusing and blaming one another, being verbally abusive, trying to figure out how they can overpower others, and all but forgetting to pay attention to the group's mandate. What tools do you need to turn your contentious meeting from a war zone into a construction zone, convert it from a problem into an opportunity? What tools will help you motivate the members to listen to one another and build win-win solutions that will work for the organization as a whole?

The list goes on: What tools do you need to deal effectively with a complex issue? How do you balance the need for creative and free flowing discussions with the need to move forward on the agenda? How do you make your meetings more interesting, engaging, and even fun? How do you encourage creative thinking and innovative solutions, unconstrained by past traditions?

Responding to the above questions, this book contains practical and proven tools to address these challenges and many more. I hope your organization will benefit from it. No one deserves the pain and agony of confusing and monotonous meetings, nor the acrimony that comes from dysfunctional relationships and communication breakdowns. Given your expenditure of time, money and other resources in meetings and consensus building efforts, you, your group and your organization deserve substantial returns on this investment. Insist on them.

INTRODUCTION

This book is intended to assist corporate and civic leaders in planning and facilitating meetings and consensus building efforts. It is much more than a meetings book. A major portion of it shows you how to create a healthy foundation for your group's consensus building efforts. Once the foundation is set, the book give you tools to respond to the many challenges of planning and running meetings.

This book is highly practical. In writing it I assumed that you are a busy manager or executive who needs practical and proven tools for immediate use, without spending much time analyzing theoretical concepts. The book is based on many years of hands-on experience of planning and facilitating meetings and consensus building efforts, ranging from peaceful and harmonious settings to ones which are complex, controversial and dysfunctional. I am sharing the lessons learned from both the successes and failures I've had as a professional meeting facilitator and procedural advisor.

The need for this book arises from the increasing appetite by organizations to shift from 'telling people what to do' to empowering and involving them in corporate decision making. The idea of including individuals in participatory decision making is not new and is great in theory, but it often fails miserably on the ground. There is growing cynicism towards "pretend democracies", where managers claim to be inclusive, but use their clout to impose the decisions that really count. The other extreme is when corporate democracy becomes a free-for-all, with all accountability is lost and with vocal minorities getting their way, leaving the manager and others wondering what went wrong.

Is there a place for meaningful but responsible democracy in your meetings and corporate decision making? Is corporate democracy desirable and, if so, is your management team truly ready to embrace it? Are you ready to manage the risks of letting go of control and empowering staff to make or influence decisions? Conversely, are your staff members ready to operate more proactively? Are they willing to let go of the dependency on others for leadership? Will they take more initiative? Will they pay the price of the greater accountability that comes with higher levels of empowerment?

And if you already have a degree of democracy in your organization, how meaningful is it? Do you have an accurate reading of the pulse of the majority, or are you governed by the most vocal and outspoken individuals? Are participants in your meetings speaking up, and is their input genuinely making a difference? Are their collective recommendations taken seriously? How often and to what degree is their consensus embraced and implemented?

And just what does corporate democracy mean in your organization? Does it mean you do everything that staff wants you to do, making it a free-for-all? What can you do to balance the need to benefit from the talents and expertise of staff and stakeholders with the need to maintain accountability and make responsible and profitable decisions?

The above questions must be addressed at the highest levels of your organization and at each decision making level. The answers to these questions will determine which of the tools offered in this book should be used and the degree to which they will apply.

In my view, there is a need and a place for responsible democracy in corporations, even though chief executive officers are not elected by their subordinates, and even though managers often have the full power to act without consultation. If well managed, corporate democracy can help you boost the quality of your decisions by capitalizing on the knowledge and expertise of individuals. It can also increase staff loyalty and commitment to the organization and its mandate. But to truly gain from corporate democracy you need tools to reap its benefits while managing the risks associated with it.

In this book I offer tools to help you establish a healthy, meaningful and responsible democracy in your own team and your entire organization. Using these tools, you should be able to engage your staff and stakeholders in discussions and decision making, while maintaining accountability and ensuring that responsible, credible and durable corporate decisions are made.

The types of tools you'll find in this book include:

- Proven ideas and tips to turn problems into opportunities
- Scripts for managing meetings
- Scripts to deal with difficult people and challenging situations

- Tables and checklists
- Assessment tools
- Case studies

Some of the tools in this book are accompanied by an explanation of the suggested approach and its effects. In other instances, such as the many scripts offered, my approach is implied in the tool itself and no detailed explanation or analysis are given.

This book is not meant to be read cover to cover in one stretch and then filed away on your shelf. It is meant to be used as a reference on an on going basis. I suggest you experiment with some tools and ideas, and then come back for more. Some of the ideas will be useful in the immediate term, some you'll need to modify, some will be useful later, and some will not apply to your meetings in their present form. Improving your meetings should be an evolutionary, not a revolutionary process.

Here are some of the things this book **will not** give you:

- This book does not cover rules of order for formal meetings, in which motions, amendments, points of order and other formal procedures are used. If you need ideas on how to simplify, demystify and humanize the rules of order and parliamentary procedure, you may want to review chapter 7 in "**The Complete Handbook of Business Meetings**" (AMACOM 2000).
- Although this book addresses sensitive issues like personal conflict of interest, confidentiality and 'in-camera' meetings, it does not offer legal advice. I am not a lawyer, and I therefore focus only on the practical impacts of these sensitive issues on meetings and consensus building.
- As tempting as it may be, I cannot claim this book is an all-inclusive encyclopedia of ideas and tools to improve your meetings and consensus building efforts. I fully anticipate that, by the time the book is published, I will have chaired many more meetings and will have led many more training programs, which will undoubtedly expand my inventory of tools and ideas. However, I expect the fundamentals and the principles behind my approach to remain the same.

The book is structured as follows:

- Part 1 (chapters 1 to 7) includes tools to build a healthy foundation for consensus building and shared decision making.
- Part 2 (chapters 8 to 18) includes tools with which to plan and manage meetings.
- The appendices include case studies that show you how the approach given in this book can be used to deal with challenging and complex situations.

Eli Mina's guiding principles for meetings and consensus building:

- A healthy meeting may be impossible to achieve if the organization itself is not healthy.
- The success of a meeting is ultimately measured by the quality of the decisions made in it.
- The process of reaching a collective decision is just as important as the decision itself.
- In a good meeting everyone arrives at the same destination at the same time, as proactive and enthusiastic partners, not as reluctant neighbors.
- Your challenge in a meeting is to create the right balance between inclusiveness and efficiency.
- Never attribute to malice what can be attributed to a misunderstanding or systemic problem.
- To truly gain control, a leader must know how to share control and build partnerships.
- It is much easier to be a critic and oppose something than to be a creator and propose a better alternative.
- We were given two ears and one mouth, so we could listen at least twice as much as we speak.
- Diversity of opinions is something to celebrate. An opposing view or a piece of criticism should not be seen as a threat, but as another piece of the bigger truth.