Avoiding Death by Meeting
Skills to Run an Effective Team Meeting
Objectives

• Identify types of meetings, their goals and aspects of pre-planning to consider prior to any effective meeting
• Discuss strategies to design and utilize an effective meeting agenda
• Discuss and apply strategies for running effective meetings, including managing constituencies, leveraging engagement, allocating responsibilities, and ensuring follow-up
Think about a recent meeting...

Did the meeting go well, or poorly? Why?
Outline for Today’s Workshop

• Video: 2 clips
  • Small group facilitated brainstorming
  • Large group debrief
• Common Meeting Pitfalls
  • Challenges
  • Options for intervention
• Video: our meeting, revisited
• Q & A
Video Clips and Group Discussion
It’s Your Turn

• Video: meeting gone terribly wrong

• Observe DELIBERATELY
  • Take notes!!
  • Pay attention first to the attendees (1) THEN the leader (2)
  • Verbal and non-verbal cues
  • Look for Stimulus-Response:

    What went well and WHY? What didn’t go well and WHY?
Let’s Recap...
Tools to run an effective team meeting
BEFORE the meeting...
Step 1: Identify the purpose of your meeting

Are you lonely?
Tired of working on your own?
Do you hate making decisions?

HOLD A MEETING!

You can —
• See people
• Show charts
• Feel important
• Point with a stick
• Eat donuts
• Impress your colleagues

All on company time!

MEETINGS
THE PRACTICAL ALTERNATIVE TO WORK
Step 1: Identify the purpose of your meeting

• To SHARE information

• To ENGAGE in discussion or GENERATE ideas (brainstorm)
  *Goal is process oriented*

• To MAKE a decision
  *Goal is task oriented*

• To BUILD camaraderie
  *Goal is team-building*
Step 2: Identify necessary AV needs
Step 3: Consider Room Setup

U Shape Cabinet

Auditorium

Rounds
Step 4: Engage the right participants

Consider the
• Knowledge-holders
• Decision-makers
• Stakeholders
• Need-to-know-ers
• Implementers
Step 5: Draft the agenda
You are running the following meeting...

Division Meeting (8-9am)
• Rx Partners at home (guest speaker)
• DGIM Patient Experience – Physician Champion Award (Dr. McNeil)
• Routing letters in Epic (UPMC Community Provider Services)
• Home Health Services Referrals (Clinic Director)
• Qualitative Chronic Pain study (guest speaker)
• Epic Pilot (Clinic Director)
• Precepting (Dr. McNeil)
Step 5: Draft the agenda

- Seek the team’s input and consider making the first item: “Review and modify the agenda as needed”
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- List agenda items as questions the team needs to answer
- Estimate a realistic amount of time for each topic
  - Can any items be accomplished via email?
  - Or via smaller work-groups?
  - Can any items be broken down into smaller individual tasks?
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- Estimate a realistic amount of time for each topic
- Identify who is responsible for leading each topic discussion
- Make the agenda bell-shaped
The Bell-shaped Agenda

Easy topics:
• Welcome & Introductions
• Roles (minutes, time)
• Announcements
• Celebrate successes!

Difficult Issue

For Discussion Only:
• FYIs
• Decision to be made later
• Preview items for next meeting
Step 5: ... and then you must stick to it
Opening your meeting

• Start on time. Don’t run late, and end early if possible
• Make introductions & assign roles (e.g., minutes, time keeper)
• Consider establishing ground rules (e.g., electronic devices, confidentiality)
• Avoid recapping for late-comers
Promoting engagement

• Know your team members, and how to use them!
  • Examples: The ideas person, the devil’s advocate

• Credit people for their ideas to show you value them
  • Attach names to ideas to promote synergy
  • “That’s similar to what Susie shared. Looks like we’re getting some traction around that idea”

• Provide prompts if needed
  • “Have we forgotten anything”
  • “Who haven’t we heard from yet?”

• Use the parking lot for ideas better addressed in other settings
Closing your meeting

• Summarize key action plans (what, by whom, & by when)
• Deal with unfinished business. Are agenda items:
  1. Time-sensitive, don’t require full group input → delegate
  2. Time-sensitive, require full group input → earlier meeting
  3. Not time-sensitive, require group input → bump to next meeting
  4. Unimportant → drop them
• Distribute minutes promptly
• Express gratitude for everyone’s work (attention, time, etc)
Trouble-shooting attendee personalities
The Bad Meeting Suspects

- Mr. Late Arriver
- Meet-Head
- Ms. Agenda-Less
- Meeting Hog
- Meeting Highjacker
Meeting Personalities: Highjacker

• Be prepared

• Establish clear agenda with team input and be directive in sticking to it
  • Parking lot

• If off topic or random comment, listen, validate, redirect
Meeting Personalities: Wallflower

• Gently and strategically engage all members and all perspectives

• Invite members to participate, leveraging their strengths and expertise (cold call)

• Plan activities designed to elicit all opinions (brainwriting, pair-share, etc)
Meeting Personalities: Negative Nancy

• Explore concerns Nancy’s concerns, some of these may be valid and valuable.
• Elicit and address concerns early
  • If time permits, consider meeting with Nancy prior to your meeting to discuss items you expect will be challenged
• Plan for challenges prior to meeting and have responses/solutions ready
• Ask for solutions
• Agree to disagree. Take discussions offline when needed
Meeting Personalities: Expansive Optimist

• Redirect optimism—point out unrealistic goals

• Ask how a lofty goal might be achievable

• Use specific questions to gain input from optimist that will be realistic
Video Clip:
Our meeting, take 2!
It’s Your Turn

• Observe DELIBERATELY
  • Take notes!!

• Pay attention to the meeting leader AND the attendees

• Verbal and non-verbal cues

• Look for Stimulus-Response
Debrief

Which of the strategies that we discussed did you see employed during this clip?
Time to Commit

“Knowing is not enough; we must apply. Willing is not enough; we must do.”

-- Goethe

Identify 1-2 new techniques you will employ when running meetings in the future
Questions?