



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

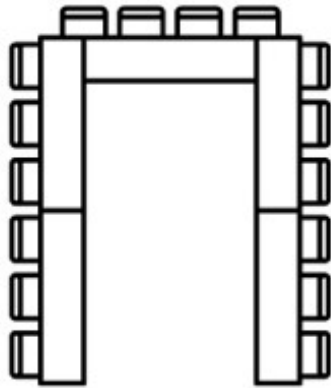
- To SHARE information
- To ENGAGE in discussion or GENERATE ideas (brainstorm)
Goal is process oriented
- To MAKE a decision
Goal is task oriented
- To BUILD camaraderie
Goal is team-building



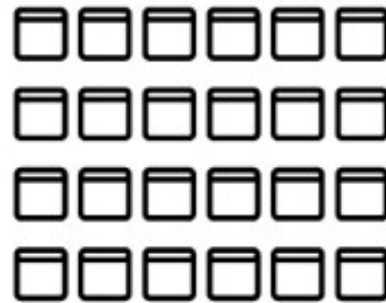
Step 2: Identify necessary AV needs



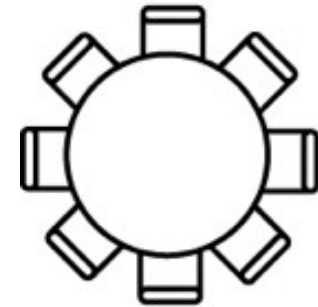
Step 3: Consider Room Setup



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:
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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?

Step 5: Draft the agenda

- Seek the team's input and consider making the first item "Review and modify the agenda as needed"
- List agenda items as questions the team needs to answer
- Estimate a realistic amount of time for each topic
- Identify who is responsible for leading each topic discussion

Step 5: Draft the agenda

- Seek the team's input and consider making the first item "Review and modify the agenda as needed"
- List agenda items as questions the team needs to answer
- Estimate a realistic amount of time for each topic
- Identify who is responsible for leading each topic discussion
- Make the agenda bell-shaped

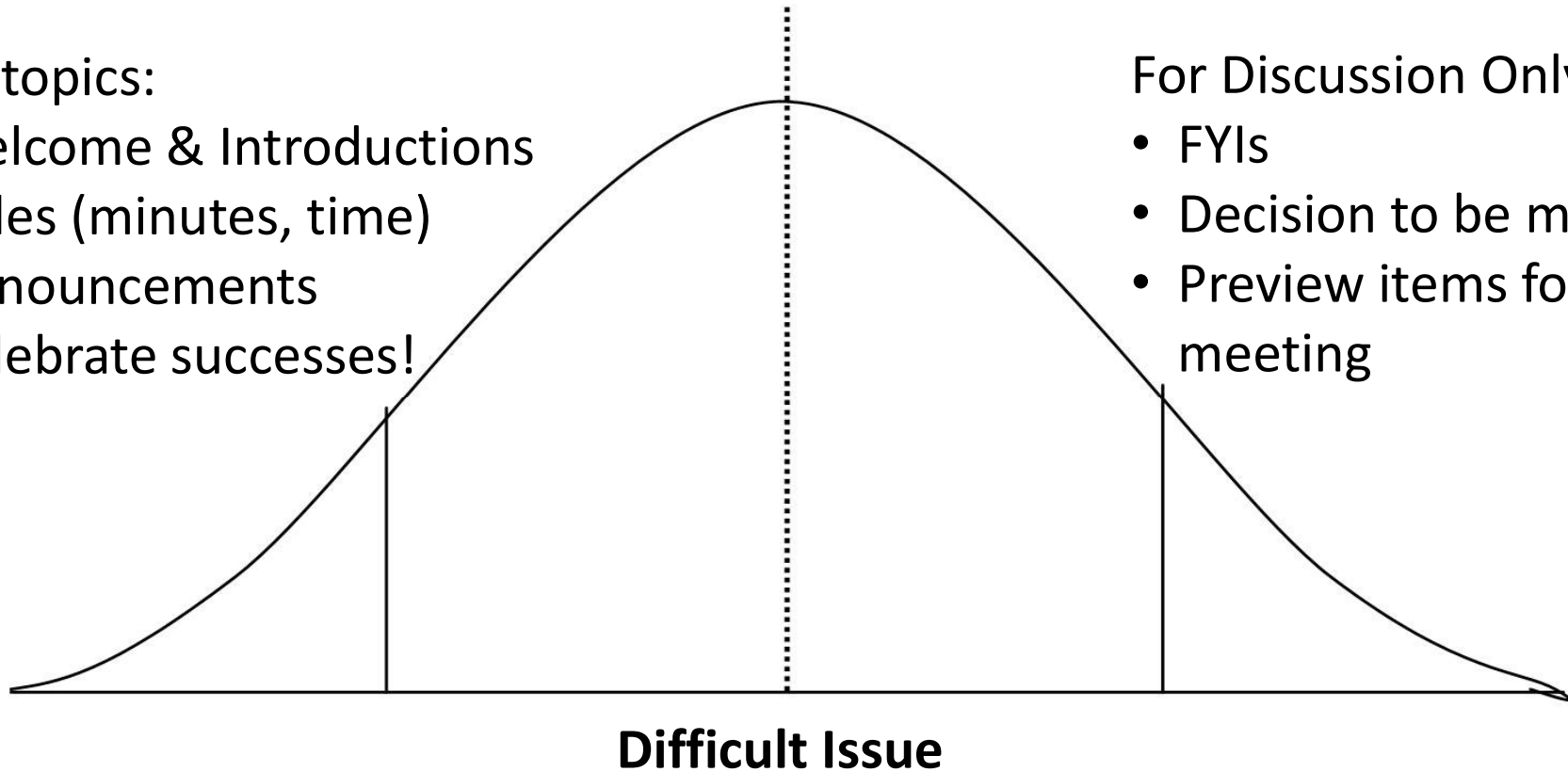
The Bell-shaped Agenda

Easy topics:

- Welcome & Introductions
- Roles (minutes, time)
- Announcements
- Celebrate successes!

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

6'2"

5'10"

5'6"

5'2"

4'10"

4'6"



**Mr. Late
Arriver**



**Meet-
Head**



**Ms.
Agenda-Less**



**Meeting
Hog**




**Meeting
Highjacker**

Meeting Personalities: Hijacker

- 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?
