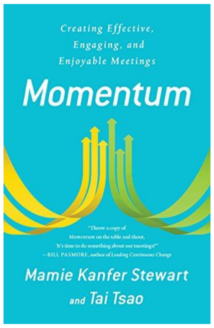

YOUR KINDLE NOTES FOR:

Momentum: Creating Effective, Engaging and Enjoyable Meetings

by Mamie Kanfer Stewart, Tai Tsao

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38 Highlights | 2 Notes

Highlight (Yellow) | Page 11

> Professor Steven Rogelberg of the University of North Carolina, along with his fellow researchers, cited in The Cambridge Handbook of Meeting Science, that on average, employees spend 6 hours and managers spend more than 23 hours a week in meetings.

Highlight (Yellow) | Page 38

> Michael Mankins, Chris Brahm, and Gregory Caimi at Bain & Company, a prestigious strategy consulting firm, used data-mining tools to analyze how organizations schedule meetings and found how a weekly executive meeting causes ripple effects throughout an organization. They found that to conduct a weekly status meeting for the executives, business unit leaders need to hold 11 meetings just to prepare. These meetings require another 21 team meetings to synthesize the information or prepare for upper-level approval. To achieve that, another 130 preparation meetings are held to support the team meetings. So, in the end, one weekly executive meeting can cost a staggering 300,000 person-hours per year in an organization.

Highlight (Yellow) | Page 43

> Kim Scott, author of Radical Candor: Be a Kick-Ass Boss without Losing Your Humanity, shared one interesting ritual to shape a positive team culture: bring a stuffed monkey to team meetings. She called it “Whoops the Monkey.” In the meeting, she asked people to share a mistake they’ve made in the previous week. Whoever shares a story gets forgiveness immediately. Then, team members applaud for the best failure story, and that person wins Whoops for the week. This ritual encourages team members to reflect on their mistakes and helps them feel more comfortable being vulnerable in front of colleagues.

Highlight (Yellow) and Note | Page 48

> Professor Leslie Perlow and collaborators at Harvard Business School surveyed 182 senior managers in a wide range of industries on how meetings impact their work. Sixty-four percent of respondents said, “Meetings come at the expense of deep thinking.” When leaders’ calendars are run by their meetings, it leaves little time for them to do deep-thinking work. This not only harms productivity; it hinders innovation and strategic thinking.

Huge problem in organizations via @mamieks

Highlight (Yellow) | Page 50

A 2015 Gallup study, “State of the American Manager,” concluded that “managers account for 70 percent of the variance in employee engagement scores.” A boss who drags you to unproductive meetings is wasting your time. If she doesn’t encourage your participation or value your input, you might feel demotivated. If she doesn’t help crystalize next steps or assign clear responsibilities to you, you might feel lost and confused when the meeting ends. Those feelings actually drain your energy. It’s hard to be inspired to do your best work when you don’t feel good about your colleagues, boss, or work environment.

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A 2014 study by Tower Watson shows when you’re stressed, you’re not working your best. Employees reporting high levels of stress take almost double the sick days as their less-stressed counterparts.

Highlight (Yellow) and Note | Page 52

Calculate the cost of your meetings by visiting this website: hbr.org/2016/01/estimate-the-cost-of-a-meeting-with-this-calculator

via @mamieks

Highlight (Yellow) | Page 56

Few people have experienced any form of education on effective meetings, and this lack of training contributes to the epidemic of bad meetings in many organizations.

Highlight (Yellow) | Page 56

The impact of productive meetings on an organization’s people and performance is hard to measure. There are few hard metrics that can be linked between certain types of cause and effect.

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The experience of a meeting often goes something like this: The meeting leader has grand plans for what she wants to accomplish, but she keeps it mostly in her head. She shares a bit of information in the calendar event or by email, such as the title of the meeting or a sentence about what the group will do during the meeting. Participants, having such little information, fill in the blanks and imagine the meeting to have some other focus. In the meeting, the conversation wanders, and what is actually talked about isn’t what anyone was prepared for. There is very little documented during the meeting. Maybe a few people scratched some notes for themselves, but there is no collective set of agreed-upon notes. A few days or weeks later, people debate what decision was made or can’t remember who said they were going to do what. People who weren’t in the meeting were told nothing, creating more confusion about what’s going on. Finally, a follow-up task or two gets done, but no one is keeping track and it’s unclear whether that task was even necessary.

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> In fact, you actually get more time in a 60-minute meeting than in two 30-minute meetings, due to the start-up and wind down time. Meetings never start exactly on time. Assume every meeting has 5 minutes of “getting in the room” time, during which people are walking or calling in, materials are being pulled up on the screen, etc. Then you have a few minutes of orienting the group to what the meeting is about and what you want to accomplish. Then, at the end of the meeting, you have a few minutes of wrapping up and reviewing next steps. Regardless of the length of the meeting, you can safely assume 5–10 minutes of entry and exit costs per meeting. So, for two 30-minute meetings, you get 40–50 minutes of conversation time. A single 60-minute meeting allows 50–55 minutes of dialogue. This may seem minor, but it’s not.

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> Meetings are ideal for issues with high complexity or when sense-making is needed. Meetings provide space for people to think collectively, listen to one another, and connect dots to shape reality. Not every situation requires this type of conversation.

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> A meeting should rarely be held simply to inform participants or stakeholders. The exception to this practice is when the information is highly sensitive or complex, or stakeholder buy-in is needed. Most meetings primarily centered on information sharing should be replaced by an email or memo.

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> The most fundamental and essential element to a productive meeting is the desired outcome. A desired outcome is the specific result you intend the meeting to accomplish.

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> The Six Reasons to Meet There are six common reasons to have a meeting. Keep in mind, any one meeting can cover multiple reasons, but often there is a primary purpose. Knowing the high-level reason will help you articulate exactly what you need to accomplish and guide how you structure or design the session. 1. Decide The goal of this meeting is simple and straightforward—you want to come out of it having made one or more decisions. Said decision is clear and understood by the group, so everyone can take the appropriate action. 2. Ideate Brainstorming or ideation meetings generate a list of ideas, workable solutions, or questions regarding the matter at hand. These sessions produce lists and options, rather than narrowing down on a single decision. Brainstorm meetings often go hand in hand with decision meetings where the first part of the agenda is brainstorming and the second part is coming to a decision. In this case, it’s a decision-making meeting. 3. Produce These meetings are often working sessions in which participants create or enhance a deliverable. The resulting material doesn’t need to be complete—a work in progress or straw model is completely acceptable. The key is that the outcome is tangible and drives the project forward. Produce meetings include activities such as creating a brand board, enhancing a strategy document, and composing a customer feedback survey. 4. Plan In planning meetings, you establish clear strategies and next steps. Planning meetings can be very detailed,

resulting in specific actions ready for you to execute, or high-level, resulting in approaches that will guide the team's work. Use these kinds of meetings to make sure everything is in place to help move your project forward. 5. Align In alignment meetings, you make sure everyone has a shared understanding of complex information. Everyone talks through the information, situation, or problems and lands on a final shared understanding. This is different from simply making a presentation, which is rarely a good enough reason to hold a meeting. You are doing more than making sure everyone has the same information. You are both sense-making together and ensuring each person's interpretation of the information is in line with the rest of the group so everyone can move forward on the same page. 6. Connect In this type of meeting, you want to build stronger relationships. These meetings can include team-building exercises, retreat sessions, or involve establishing rapport with a client. No matter the participants, at the end, all parties should feel more connected.

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As previously mentioned, though meetings usually have a primary reason, they are rarely limited to only one. Maybe you're having a meeting about making a decision, but you also want to use it as an opportunity to help the team connect. The former objective is external, or what the participants need to know, while the latter is internal, for your own purpose. You won't spell out the internal objective on the agenda, but you can use it to help frame the meeting. It might lead you to make different choices. Perhaps you'll include an introduction that gives people the chance to check in and share differently than if you were just holding a decision-making meeting. Both the internal and external reasons for this meeting are important to the outcomes you want to achieve.

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Start with a Noun, Not a Verb Starting with a noun rather than a verb makes it easy to evaluate whether you achieved a specific result. It can be tempting to say the purpose of a meeting is to discuss something or to brainstorm options or to share information. Remind yourself that a purpose is different from an outcome. We often conflate enjoyable meeting activities with productive ones. It's hard to evaluate whether an activity was useful without knowing what the activity should result in. Imagine reflecting with the team at the end of a meeting and asking, "Did we brainstorm?" That would feel silly. Instead, you might ask, "Did the brainstorm result in what we needed to move forward?" The difference between those two questions is subtle but important. When you start with a noun, the desired outcome for a brainstorming meeting might be a list of three to five actionable ideas. If, at the end of the meeting, you have no list of ideas or too many wild ideas, you did not achieve your desired outcome. You might have had great conversation and talked through some problems, but without that list of three to five, you missed the mark. You might leave the meeting feeling as if you accomplished something, but in reality, there is still work to be done. Try using the aforementioned Six Reasons to Meet to frame the outcomes. You might say you want, "A list of next steps for XYZ," "alignment on XYZ," or "decisions on XYZ." Then, you can save the action verbs such as "review," "brainstorm," or "share" for agenda items. It helps to make the desired outcome specific and avoid using language referring to anything that can't be easily evaluated. In our brainstorming example, "a list of three to five" is better than simply "a list." Taking that further, you might say "a list of three to five ideas to be shared with senior leadership as possible solutions." The addition of the descriptor helps the team evaluate whether the ideas they've selected for the list are appropriate.

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Writing things out can help you maintain clarity. Some organizations I've worked with write a purpose statement and an outcome statement. They'll write, "The purpose of the meeting is to review the budget. The outcome is an approved budget." They do this to make sure both are clearly understood by all parties and everyone stays on the same page.

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Call It a Desired Outcome Language matters. Avoiding confusion and the tendency to make "to + verb" statements is the reason we at Meeteor decided to use the term "outcome" instead of "goal" or "purpose." We try to steer clear of words that can be interpreted in different ways. Focusing on "outcomes" helps you stay crystal clear about both why you are meeting and what you want to achieve. You would never say the outcome of the meeting is a discussion on the budget, yet I've been invited to meetings where the invitation says, "to discuss the updated budget." It's much more useful to say the outcome is "a finalized or approved budget." You go into the meeting intending to leave with a decision: The budget is accepted and can be acted upon. Without that approval, the meeting will not have been a success.

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Internal and External Desired Outcomes It is possible to have both internal and external desired outcomes for one meeting. The former is something intentionally articulated to the group, whereas the latter might be something only meeting leaders or certain team members need to be cognizant of. If you do have an internal desired outcome or "hidden agenda," be sure to think about how your meeting is designed to achieve that desired outcome, as well as the explicit one. For example, if you are meeting with a client, the desired outcome written on the agenda might be, "Next steps and revised timeline for this project are agreed upon." Internally, however, your desired outcome might be, "Better understanding of the client's satisfaction with the relationship." You might not write it on the agenda, but it's something for your team to be mindful of.

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The desired outcome will help you distinguish between who needs to attend and who needs to be informed. Consider which individuals have knowledge or perspectives to contribute and those who have authority. Think about which relationships you want to strengthen and whose buy-in you need. The reason for the meeting and the specific desired outcome you write will influence who you invite. Early on, people might question your choice to only invite a few key people to a meeting. Some people may feel you've intentionally left them out. Yet, at the same time, others may secretly or openly thank you for not taking up time on their calendars, because no one really wants to sit through another meeting just because you felt bad. If the idea of limiting meeting invites to only the critical contributors seems too outrageous for you or your organization, consider making non-critical participants optional, so they can decide if their attendance is worthwhile. Just be sure to follow up with them and any other stakeholders who need to be kept in the loop so they stay informed of the meeting takeaways.

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> A desired outcome is not only meant to help you, as the meeting planner. The desired outcome should be shared with meeting participants prior to the meeting, along with the meeting invite and agenda. This will help people determine whether their participation is needed at the meeting and provide confidence that the meeting serves a purpose. When you receive an invite or agenda without a clear desired outcome, it's your responsibility to ask the meeting leader for more information.

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> Accept or Decline a Meeting Accordingly When you receive an invitation to a meeting, it's important to decide if attending is the right use of your time. The desired outcome provides the first bit of context for this determination. If the meeting leader doesn't provide one, inquire about it. If you can't figure out why you've been invited or what you can contribute, ask for more information. It's imperative we take ownership over our time. Connect with the meeting leader and ask, "Is there something in particular you expect me to contribute to this meeting?" While meeting leaders should be thoughtful about who they invite, they can make mistakes, or, just as likely, they haven't given it enough thought. If you're not convinced your presence is necessary, don't be afraid to say so. As the meeting leader, let people know it's reasonable for them to opt out of a meeting if they feel it's not the best use of their time. Most workplaces have cultures in which declining a meeting is seen as strange or possibly unacceptable. We should be allowed to decline a meeting for a reason other than a scheduling conflict.

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> Stating the desired outcome at the beginning of the meeting gets everyone mentally prepared for focused work. If you've previously articulated the desired outcome, you might say something like, "The desired outcome of this meeting is (a final version of the deck that is ready to send to the customer). Any suggestions or modifications?" Or, "It would be awesome if we could walk out of this meeting with (a list of 5 critical questions to explore). What do you all think?" If you are a meeting participant, you can also facilitate the meeting to start with the desired outcome by asking one of the following: "Can anyone help remind us what we plan to achieve by the end of this meeting?" "It's my understanding that we'll achieve [alignment on next steps for the marketing campaign] by the end of this meeting. Does this resonate with everyone here?" "What do we hope we'll get done by the end of this meeting?"

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> Regardless of your role, you can help the team feel a sense of accomplishment and reflect on what could be done differently. At the end of your upcoming meetings, try one of the following questions or statements. "What have we achieved in this meeting? What are some immediate next steps?" "I noticed we didn't quite achieve what we set out to do in the beginning. I wonder if anyone shares the same feeling. What can we do differently next time?" "I'm very glad we achieved [alignment on next steps for the marketing campaign] during today's meeting. Nice work everyone!"

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A robust agenda includes the following items: Desired outcome Agenda topics Prework Norms Roles

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Try to include a verb that describes the activity in addition to the topic of the conversation. For instance, rather than simply writing, “Budget,” write, “Review budget” or “Finalize budget.”

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According to the “planning fallacy,” a phenomenon proposed by Daniel Kahneman and Amos Tversky, we consistently underestimate the amount of time something will take. One typical example of this is an opening segment during which each person in the meeting is asked to reflect on the prework, ask questions for clarification, or highlight areas of concern. It might be tempting to allot 5 minutes to this agenda item, but upon further reflection, you realize that with 7 people in the meeting, if each takes 2 minutes, you’re suddenly at 14 minutes of reflection.

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Another common problem is getting stuck on one topic. It’s too easy to spend the entire time on the first agenda item and run out of time for the rest, leading to the need for another meeting. But if participants know you only have 10 minutes for this topic, they’ll be more likely to keep their comments brief, add value, and stay on topic.

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A well-structured agenda will always include a few critical activities. We recommend you always begin with a check-in—which brings people into the room and grounds the conversation—and end with a wrap-up to clarify meeting outcomes.

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Most of what we’ve discussed in this chapter so far would be listed in the macro-agenda. The facilitator would have the micro-agenda, which had much more detailed information. In addition to listing the agenda topics like “Review the Budget (10 minutes, Mamie to lead),” it would include notes like this: “Review the Budget (10 minutes, Mamie to lead) Review YTD budget document v2 Call attention to lines 12 (underspend on marketing) and 17 (overspend on consultants) Ask for any additional questions for clarification or points to highlight Doing it this way helps the meeting leader be an effective facilitator without bogging down the rest of the participants with too much information.

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If, as a meeting participant, you don’t receive an agenda 24 hours in advance, you have an obligation to request one, or at least ask, “Can you tell me what you’re expecting us to accomplish in this meeting or what role you want me to play?” Participants can play an active role in encouraging planners to create agendas.

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> Research shows that many people do their best thinking 24–48 hours after they've engaged with an idea. This is where the idea of "sleeping on it" originated. When appropriately designed and assigned, prework can be engaging and beneficial.

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> Prework can be more than text, spreadsheets, and charts. I know one CEO who leaves everybody a voice memo as the prework. She talks through the context, provides details, and explains the complexities. Everyone can hear in her voice where she is confident and where she is questioning. If instead she wrote all her thoughts out on paper, the group would not get the richness that comes with being able to hear her voice as she explains everything.

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> Be Specific Regardless of what the prework is, the meeting leader must offer specific instructions for how participants should approach it. Be clear when communicating what you want them to think about. For example, a prework that reads, "Review the attached document and come ready to share your takeaways and how this will influence your next steps," could yield different results than if it just says, "See attached." When you provide specific instructions, people can connect how the prework will help the meeting achieve its desired outcomes. It also reduces the human tendency to delay doing work that's not clear.

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> A good rule of thumb is to allow for between 5 and 10 minutes of prework for every 30 minutes of meeting.

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> Reminders Make a Difference It helps to send out prework 24–48 hours before meetings. More complex meetings might require prework to be sent out even earlier. If the topic is complicated or the meeting is long, make sure people have plenty of time to do the necessary preparation. When prework is sent more than 48 hours in advance, I recommend you send a reminder the day before or morning of the meeting to make sure everyone remembers to complete it. In the reminder, be sure to include the instructions and materials. Don't make people dig through their email to find your original. That creates an unnecessary obstacle or even an excuse. I've heard people say in a meeting, "I couldn't find the materials so I didn't have a chance to read them."

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> If none of the practices above fit the culture of your organization, some companies, such as Amazon and LinkedIn, include time in the meeting to do the prework. These organizations build time into the agenda to allow for reading several pages that explain everything the group needs to know. This is not a presentation, which runs the risk of becoming too drawn out or spiraling off topic. The materials can be exactly the same as if you sent them ahead of time. They should take no more than 10 minutes at most to consume. While this is an acceptable

solution to a less than ideal situation, it would be much better if everyone did the pre-meeting work expected of them. Finding a quick 10 minutes of your own time to prepare is much better than wasting a shared 10 minutes.

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