

MEETING MANAGEMENT TOOLS

TEAM PURPOSE

It is very valuable to define why a group of people is meeting, whether this is a one-time activity, whether it is an on-going team with specific responsibilities, a temporary team with a specific project to accomplish or other.

TEAM VALUES

For on-going teams in particular it is very important to define the values that the group jointly agrees are important.

For example:

- Timeliness
- Being fully present and prepared, and
- Confidentiality

are among the very common values of teams that achieve high performance.

TEAM GROUND RULES

Ground rules are things you can agree to and measure.

Example ground rules might include:

- Team will meet at least...weekly.
- Everyone agrees that the meeting is a priority over other activities.
- Meeting will begin and end on time.
- Group/team will use meeting management tools.
- Agenda will be out at least 24 hours in advance of meeting.

OTHER TOOLS

AGENDA – see Agenda model

ACTION-DECISION REGISTER – see Action-Decision Model

It is valuable to review the previous meeting's AD register at the beginning of each meeting to ensure actions due were accomplished, and to have the scribe review the actions and decisions that were captured during the meeting, at the end of the meeting to ensure everyone agrees to what is captured.

ROLES:

- Facilitator – manages the meeting processes, champions, and keeps the meeting on schedule.
- Scribe – captures all agreed on actions and decisions
- Timekeeper – assists the facilitator with the schedule in large meetings

CHECK IN

The purpose of the check in is to find out if any individual has any particular distractions or if the scheduling of the agenda needs to be adjusted for emergencies. It also acts as a “pressure relief” if something major has just occurred to a person (lost a loved one or won the lottery).

The questions asked are:

- How are you?
- Is there anything in the way of you being here?

CHECK OUT

The purpose of the check out is to constantly learn how to improve the meetings.

The questions asked are:

- What was present in the meeting that made it work well? (E.g. well facilitated and people were well prepared)
- What was missing that would have made for a better meeting? (E.g. it would have been helpful to have the data further in advance to review)

CHAMPION

The champion is the person that leads the discussion on a topic.

END RESULT

What is the outcome you want from this topic? Why are we discussing this in this meeting?

PROCESSES

- Brainstorm – generally to create new ideas or approaches (multiple ways to approach this, from discussion to breaking into small groups, etc.)
- Go-Round – simply go around person by person to get each one’s input. This is a good way to ensure quiet people get to speak.
- Info-Share – one person provides information to the group so that everyone hears it the same way, at the same time and can ask questions of clarification.
- Decision – come to a group decision on issues that affect the whole
 - Five-Finger Vote – a popular way to quickly get to people’s views. It can eliminate a lot of unnecessary discussion. Basically, have people vote using their fingers for how much they support the choice. Five fingers vote indicates they think it is a great idea and is the perfect solution. Four fingers vote suggests that they think it is the best of the options currently available. Three fingers vote suggests the person is fine with the option. Two fingers vote means the person needs more information to support the choice. One finger vote means the person could not support the choice under any condition.

- Feedback – one person presents and others provide him feedback and additional information from their perspective for his or her use.