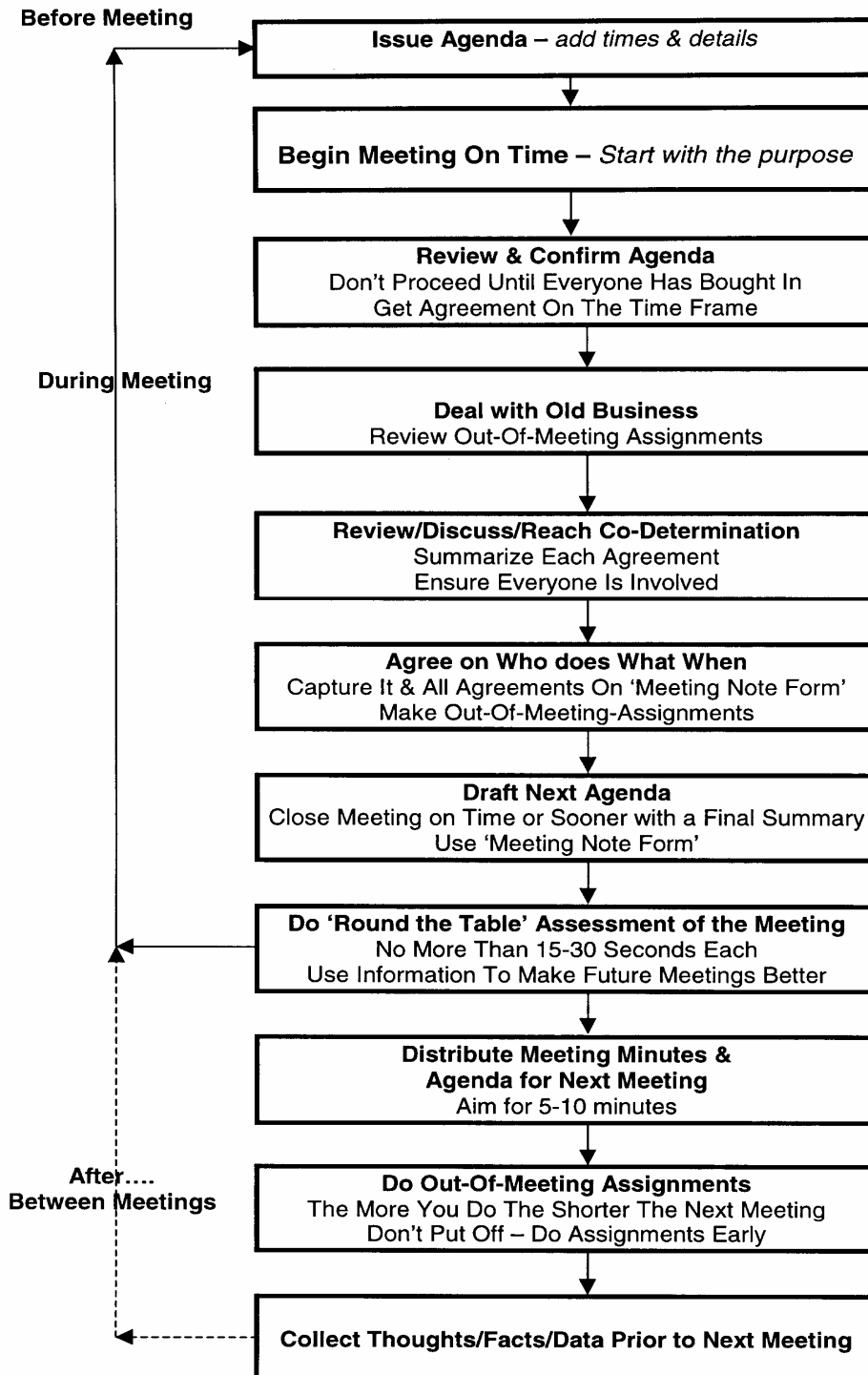# Effective Meeting Skills

INTRODUCTION

Effective meetings are crucial to ensure that teams stay on schedule. The more productive the meeting the less chance the team has of getting sidetracked. This is important because the meeting time is a valuable setting to discuss points of view, gain agreement on a general course of action. Each team member has an opportunity - and an obligation to provide input and share concerns if the best results are to be achieved.

It's often difficult to have a successful meeting because few of the team members are aware of the rules and skills required for a meeting to be truly productive. In fact, the goal of having constant improvement in meeting effectiveness should not be any different than your commitment to continuously improving processes elsewhere in the operation.

The most effective way to have a good meeting is to follow guidelines. This systematic approach will ensure that everyone's point of view is noted for discussion and follow up. Meetings become an opportunity for team members to come together and focus their ideas in a single direction. The collective power of all present is certainly greater than the sum of individual actions travelling independently of each other.

Meetings should generally follow a simple format and flow. This can be seen in the model on the following page:

Before Meeting

Issue Agenda – *add times & details*

↓

Begin Meeting On Time – *Start with the purpose*

↓

Review & Confirm Agenda
Don't Proceed Until Everyone Has Bought In
Get Agreement On The Time Frame

↓

During Meeting

Deal with Old Business
Review Out-Of-Meeting Assignments

↓

Review/Discuss/Reach Co-Determination
Summarize Each Agreement
Ensure Everyone Is Involved

↓

Agree on Who does What When
Capture It & All Agreements On 'Meeting Note Form'
Make Out-Of-Meeting-Assignments

↓

Draft Next Agenda
Close Meeting on Time or Sooner with a Final Summary
Use 'Meeting Note Form'

↓

Do 'Round the Table' Assessment of the Meeting
No More Than 15-30 Seconds Each
Use Information To Make Future Meetings Better

↓

**Distribute Meeting Minutes &
Agenda for Next Meeting**
Aim for 5-10 minutes

↓

**After....
Between Meetings**

Do Out-Of-Meeting Assignments
The More You Do The Shorter The Next Meeting
Don't Put Off – Do Assignments Early

↓

Collect Thoughts/Facts/Data Prior to Next Meeting

Effective Meeting Flow

LEARNING ABOUT BEHAVIOURS

It is important to understand that typical behaviours tend to surface when teams gather in a meeting setting. There are three different types of group behaviours:

- **Task-Oriented Behaviours...** *focus on the task at hand*
- **Relationship-Oriented Behaviours...** *focus on relationships involved*
- **Self-Directed Behaviours are destructive...** *focus on self-serving & self-directed objectives*

Task Oriented behaviours within the group are necessary for getting the job done while *Relationship Oriented* behaviours are necessary for keeping the communication channels open both inside and outside of the team. *Self-Oriented* behaviours help to explain why individuals act in certain ways and the motivating reasons behind them. Truly effective meetings will have a combination of both Task Oriented and Relationship Oriented behaviours with the individual participants exhibiting positive Self-Oriented behaviours. They are the behaviours that a Team Leader will want individuals to display during the meeting. The leader should encourage this type of behaviour to develop within the group. Let's examine the individual roles that normally develop under the three group behaviours.

Task Oriented Behaviour

Task Oriented behaviours are those, which cause people to focus on completing a given task. People who demonstrate this type of behaviour have been described as follows.

The Initiator
- This is the individual who really leads the generation of ideas during the meetings. These are individuals who are not reluctant to propose new ideas or to make suggestions at will. Occasionally, attention given to this person may encourage them to make suggestions that are irrelevant to the topic. The Team Leader should not discourage this behaviour, but direct the behaviour of the initiator toward the issues at hand.

The Information Seeker
- This is the methodical, conservative individual who will require facts and data to support any ideas, which are being discussed. This individual will provide good stability to the group and act as a foundation so that the team is not carried away with idealistic discussions.

The Information Giver
- The individual demonstrating this behaviour will provide good facts to the group and is generally knowledgeable about the process or the issue being discussed. If extra attention is given to this person, there may be a tendency for other members to resist the input, and the individual can get labeled with the term "know-it-all". However, the leader should utilize this person as a resource for good information.

The Clarifier

- This individual behaviour provides good recall of issues discussed. Frequently in meetings, discussions tend to stray off topic. The clarifier will interrupt and provide paraphrasing techniques to properly define issues. If this type of behaviour is not immediately noticed within the group, the Team Leader should assume this role, as it is important to ensure that everyone remains on topic.

The Summarizer

- This individual displays a behaviour that is also important to the Team. The Summarizer can collect different thoughts and ideas being discussed, and summarize them in an easy to understand format. Although the Team Leader is jotting notes down on a flip chart, it is impossible to capture every word. The Summarizer effectively collects these thoughts and reformats them in a manner, which is easily understood. This is the ideal behaviour for the Team Secretary to have.

The Co-determination Tester

- This person tests for the decision readiness, drawing possible conclusions and thinking ahead while the group is dealing with issues in immediate terms. You will find that this person is usually an idea generator, yet is also prone to jumping to conclusions and focusing on solutions instead of causes. The Team Leader should use this individual as a method to probe a particular idea being discussed.

RELATIONSHIP ORIENTED BEHAVIORS

Relationship Oriented behaviors are the behaviours needed to maintain proper communications and good participation among the group and outside of the group when the time comes to seek help in gathering data, or support for the implementation of your super idea. People who play these roles may be recognized as:

The Harmonizer
- This is the peace-keeper within the group. They use a reconciliation approach, are usually humorous, with a tendency to mediate in times of disagreement.

The Gate Keeper
- This individual tends to concern himself with the need for everyone to contribute and will often redirect questions back to those most silent within the group to ensure that everyone has an opportunity to contribute. This is a key function that the team leader usually assumes and is a behaviour trait that is critical to the progress of the team.

The Encourager
- This cheerleader in the group provides support to others. It is important to maintain a positive environment for the encourager to work within, since there is a tendency for this behaviour to slip into the "dark side" and the individual with this character may become quite disruptive if not properly nurtured.

The Compromiser
- This individual displays a behaviour that is more honest and down to earth than those who are more idealistic. They promote modifications of ideas, concepts, and views when particular ideas are seen to be in conflict with others.

The Tester
- The team worker with this behaviour acts as a quality inspector who checks to see whether the group is satisfied with the decisions being reached. This individual behaviour seeks the assurance that everyone is in agreement with the issues being discussed and that the decision is valid for the team to continue pursuing this topic.

When teams get together in a meeting, individuals will exhibit some or all of these behaviours. For example, you will not find one individual who is a total harmonizer. He may have parts of the harmonizer and compromiser behaviours in his approach and also may display other behaviours from the task Oriented sections as well. It is important to understand that behaviours are learned through life's experiences and an individual may display more than one behaviour given the situation at hand.

SELF-ORIENTED BEHAVIOR

The behaviors we have reviewed so far are those that contribute to the success of an effective meeting. However, individual behaviours tend to be negative at times. The following are behaviours which are Self-Oriented and tend to be counter productive, unless effectively dealt with. People who exhibit some of these behaviours can be recognized as:

The Competitor
- This is the informal leader within the group who tends to dominate the conversation and requires the need to be the centre of attention. They tend to work towards personal goals and represent their own needs instead of focusing in on the group's needs. The Team Leader can offset this behaviour by paraphrasing the competitor's input and redirecting it towards other members in the group. Another method is to simply acknowledge the competitor's input and shift the attention elsewhere.

The Disrupter
- This behaviour is seen in the person who has a tendency to fool around, reject ideas, and is generally seen as the individual who will sit in the back of the room "shooting spit balls". This person dislikes control and structure, so the Team Leader must be careful to establish the proper structure for the meeting, but avoid being too rigid with the format. Too much fooling around will distract the team. However it is also important for the Team Leader to remember that meetings should be fun too!

The Depender
- This is the person who hasn't learned to let go of the apron strings, as noted by their tendency to rely heavily on an authority figure. They frequently direct their comments specifically to the individual who holds the greatest authority (formal or informal). It is important for this behaviour to feel acceptance by the authority figure. The Team Leader can lessen this dependency, by referring the person to the group, to reinforce the unified effort of the team, rather than relying on a hierarchy structure of authority.

The Skeptic
- This individual tends to lack trust and respect for the other team members when specific ideas or points of view are being made. The Team Leader must be careful to foster an environment of trust and respect. This means maintaining openness, fairness, and objectivity, while eliminating the negative tones which the skeptic tends to introduce.

The Abstractor
- The team member with this behaviour tends to be quiet and is normally the least vocal of the group, although they probably have something to contribute. Ideas are difficult to extract from this person. The Abstractor tends to reserve comments and can often be seen jotting notes, or whispering to the person next to them. The Leader must not dismiss this person's ideas, yet do whatever is required to bring those ideas out into the open.

But What if the Disrupter becomes a real problem?

- This is potentially the most dangerous of all behaviours. Unless properly controlled, it can be extremely counter productive and could lead to the ultimate destruction of the group. This person works in an underground mode to rally up specific team members to form an alliance against other team members or against the program itself. This characteristic could also be combined with those behavioural traits seen in the Competitor. This person tends to manipulate those quieter team members and use an informal power base to begin building a structure where power is derailed from the Team Leader.

    The Team Leader must be very careful to deal with this type of behaviour in an honest and up front fashion. A common method to do this is to meet with the Disrupter after the meeting and have a one-on-one asking for their intentions. Ask the Disrupter whether they want to be a part of the team, or if need be, ask the Disrupter to resign from the team. It is important to communicate this to the rest of the team as they are probably aware of the situation. A simple technique is to take a couple of minutes at the beginning of the next meeting and to discuss the situation openly.

    The preservation of the team is ultimately important and the team members need to understand that it is the single cohesive unit which will display the strongest base to launch ideas and suggestions from. When a Disrupter is allowed to break up that team and create sub teams, the energy is used to battle each other, rather direct the group's energies towards solving a particular problem.

SUMMARY

Behavior is important to understand. It provides insight as to why particular team members act as they do. Although we are not psychologists and are not in a position to professionally evaluate certain behavioural traits, this discussion does provide a foundation for understanding.

All behaviour is learned.
The only reason someone is doing a job incorrectly
Is because they have either been shown that way,
Or have viewed others in the operation
Performing similar actions

Hence...

All learned behaviour can be corrected.
Proper behaviour can be ensured
Through proper instruction
And positive reinforcement.
Blame only widens the gap of misunderstanding
Between what management desires
And what the employee is actually doing.

LISTENING SKILLS

The most effective way for teams to function as a group is to understand the importance of listening during team discussions. It is essential to have only one conversation at a time. Therefore, team members must first begin to exercise active listening techniques. Before we begin this topic, let's take a look at how well we listen. The following self-rating sheet will give you an idea of what your level of listening is.

By reviewing your self-assessment and rating your score out of 100 you can begin to measure your level of effective listening skills. Because listening is critical to gathering proper input and ensuring that everyone remains on topic, it is important to identify those areas in which you scored low with a view toward self-improvement.

Listening is hard work and it often takes practice. Any member who is speaking is doing so with a great deal of energy and sometimes-personal anxiety. It is common respect for the other team members to listen to those ideas and thoughts being put forward by other members. You would expect nothing different if you were the one speaking. Above all, listening is important to ensure that the team remains focused on the items being discussed.

There are 3 skills involved in becoming an effective listener:

1.   **Attending Behaviour:** Listen with your whole body directly facing the speaker with direct eye contact.

2.   **Reflecting:** Periodically you reflect back to the speaker what you think they are saying (e.g. What I think I hear you saying is ...)

3.   **Directing/Leading:** Building on the speaker's words. (e.g. "Oh I see, if we attack this problem this way then would that mean that ... etc.)

Listening is a skill we can all learn. Keep in mind that a poor listener tends to pre-judge and find fault, and that gets in the way of sound understanding.

Keys to Effective Listening	The Bad Listener	The Good Listener
1. Find areas of interest	Tunes out dry subjects	Opportunities, asks what's in it for me
2. Judge content not delivery	Tunes out if delivery is poor	Judges content and skips over delivery errors
3. Hold your fire	Tends to enter into arguments	Doesn't judge until comprehension is complete
4. Listen for ideas	Listens for facts	Listens for central themes
5. Be flexible	Takes intensive notes using only 1 system	Takes fewer notes but uses 3 or 4 different systems depending on the speaker
6. Work at listening	Shows no energy input and often fakes attention	Works hard and exhibits active body language
7. Resist distractions	Is easily distracted	Fights or avoids distractions; tends to tolerate bad behaviour and habits; knows how to concentrate
8. Exercise your mind	Resists difficult material and often looks for light recreational material	Uses detailed material as an exercise for the mind
9. Keep an open mind	Reacts to emotional words	Interprets words as they are intended to deliver message
10. Understand that the mind works faster than the mouth	Tends to daydream with slow speakers	Challenges, anticipates, mentally summarizes, weighs the evidence, listens between the lines and learns how to read body language and interprets tones of voice.

Personal Listening Test

HABIT	Almost Always	Usually	Now & Then	Seldom	Almost Never	SCORE
1. Find the subject interesting						
2. Critize the speaker's delivery and mannerisms						
3. Getting over stimulated by something the speaker says						
4. Listening primarily for facts						
5. Trying to outline everything						
6. Faking attention to the speaker						
7. Allowing interfering distractions						
8. Avoiding difficult material						
9. Letting emotions cloud yourself for objectivity						
10. Daydreaming						
SCORING	Almost Always - 2 Usually - 4 Now and Then - 6		Seldom - 8 Almost Never - 10		TOTAL SCORE	

EFFECTIVE DISCUSSION SKILLS

Let's now focus on the delivery of ideas and the use of effective discussion skills to communicate thoughts and ideas.

Discussions are necessary for effective meetings to be productive. Every team meeting should include actions that stimulate an environment for open discussion. The Team Leader is most effective in leading the discussion and understanding the importance of ensuring good input from all involved.

1. **Asking for Clarification**
    - If you are unclear about the topic being discussed, or the logic in another person's argument, ask another team member to define the purpose and to focus on the issue being presented. Use of paraphrasing, or restating the thought in a different way, is required here. Use of analogies or examples is a good way to ensure proper clarification.

2. **Gate Keeping**
    - It is important for everyone to act as a gate keeper at one point or another. This will encourage equal participation among the team members and minimize those who tend to dominate the conversation. Everyone must encourage each other to contribute.

3. **Active Listening**
    - Active listening techniques are essential for an effective meeting. Members need to explore each other's ideas rather than debating or defending personal thoughts.

4. **Summarizing**
    - It is important to occasionally stop and summarize what has been discussed, to ensure that the group is in sync with the issues being discussed. A quick and easy method to remember is stop, look, listen and then proceed.

5. **Staying on Topic**
    - It is essential not to permit long examples or irrelevant discussion. Although Team Leaders have the flexibility to control the discussion, it is very easy for the group to get carried away on a single subject. The Team Leader must step forward and refocus the team's efforts towards the issue of importance.

6. **Managing Time**
    - Because the agenda acts as a guideline for the meeting, it is sometimes useful to list specific time periods next to the agenda item to ensure that the team stays on topic. It is absolutely critical for the meeting to start and end on time. If a Team Leader permits the meeting to start late or run longer than expected, the effectiveness will deteriorate over time and the respect for the meeting process becomes lost.

7. **Concluding The Discussion**
   - Discussion on a particular topic is important; however, the Team Leader must understand that every discussion needs to end. Learn to tell when there is nothing else to be gained from further discussion and help members to decide on a particular issue instead of allowing the conversation to run on.

8. **Getting Co-determination**
   - Once a discussion has reached its conclusion stage, the Team Leader summarizes the group's position and encourages the team to reach an agreement.

9. **Evaluating the Meeting Process**
   - At the conclusion of every meeting the Team Leader must allow for 5 minutes so that each member may comment on their evaluation of the meeting. This is important for the Team Leader to identify opportunity areas for improvement so that the meeting process can be continuously refined for better effectiveness.

These guidelines will help a team to have effective discussions which in turn produces more positive and interactive meetings. The mechanics of listening and discussing act as a foundation for effective meetings. Each member must work towards perfecting their discussion and listening skills so that each opinion, idea and issue is properly presented, reviewed and decided upon.

Meeting Leadership Tips

The effectiveness of a team is directly linked to the effectiveness of the leader to conduct, control and manage the meeting process. Some important points for the leader to remember are:

- Know the team members and try to understand their behaviour traits in order to properly direct the focus of attention during discussions.
- Facilitate rather than dictate.
- Acknowledge each other's contributions.
- Prevent rigid structure, individual disruptive behaviours, or interference with the goal of the meeting.
- Be aware of non-verbal communications (body language).
- Keep the group thinking about the problem instead of focusing on the solutions too soon.
- Protect minority opinions and keep opposing viewpoints from being crushed without exploring them.

These are some essential leadership techniques that should be reviewed and used as a guideline for effective meeting leadership skills.

1.   Start on time.

2.   Know the importance of proper meeting mechanics
   - following the agenda
   - note taking guidelines
   - removing distractions

3.   Keep your points numbered and your meeting format in line with the agenda.

4.   Get the team members involved in managing the meeting
   - hanging flip chart sheets
   - taking minutes
   - providing time checks

5.   Use the room as your stage
   - walk around freely
   - don't be tied down to a podium
   - use casual body language (sit on table, lean against wall, sit   occasionally)

6.   Maintain control
   - review the agenda
   - repeat the meeting objective
   - prevent cross talk

7.   Use visual aids (flip charts, writing boards etc.)
   - don't censor comments
   - don't worry about spelling
   - shorten long comments (go back to the person if clarification is required)
   - write legibly
   - get everyone's idea on the board
   - use different coloured markers to emphasize key points

8.   Ask open questions to encourage discussions. Use closed questions to conclude discussions.

9.   Stimulate conversation when ideas are slowing down
   - paraphrase questions
   - use non-verbal cues to encourage response (leave the front of the room, or ask the contributing member to write the idea on the board)
   - ask everyone for comments
   - wait patiently until a member is finished

10.   Remain neutral
-   don't take sides
-   remain non-defensive
-   avoid lecturing

11.   Acknowledge everyone in the group
-   try not to be phony
-   use probing questions
-   be aware of the silent members on the team

12.   Practice writing on chalkboard and listening at the same time.

13.   Use subtle methods to quiet the dominant speaker
-   use directed questions to someone else
-   use closed questions
-   stand near the dominant speaker as a display of physical presence (this technique displays authority)
-   be tactful

14.   To regain leadership
-   stand, don't sit
-   be visible to the entire group
-   use a clear voice that can be heard by all
-   remind the group of meeting objectives

15. Stand beside the flip chart or board
-   do not block the information
-   talk to the audience, not onto the board or flip   chart
-   it's OK to add points to existing wall charts

16.   Write large enough to be read from the back of the room
-   avoid abbreviations
-   print instead of write
-   don't overcrowd a sheet, use lots of paper

17.   Invite additional resources into the meeting, if topics are expected to go beyond the expertise of the group.

18.   Provide hand-outs to team members
-   should be prepared at least 24 hours prior to the meeting, or after a meeting has ended ready for the next

19.   Use breaks if required
-       effective method when a loss of control is evident
-       to stop a dominating member who is disrupting the meeting
-       to re-emphasize an issue

20.   Don't make time checks obvious, although they are important.

21.   Create the proper environment for the topics being discussed.

22.   Don't be afraid to have fun
-       use jokes and small talk where appropriate

23.   Be warm and friendly.

24.   Do not become over possessive with the power of leadership. Remember that your team members are also co-workers and friends

25.   Channel any nervous energy
-       do not wave pens or pointers
-       do not stand rigid, or fidget too much

26.   Leave open space in front of the room for notes and material. Arrange the room appropriately.

27.   Be flexible.

28.   Recap at the end of the meeting and explain the next steps.

29.   Conclude the session effectively.

MEETING PARTICIPATION TIPS

As a member of the team, it is also important to keep participation skills in mind. If you find meetings boring and time wasting, perhaps you can turn them around by making meetings more constructive for yourself.

1. Study the agenda and prepare yourself for the topics to be discussed. Make a point of having something to contribute.

2. Sit beside members you do not normally associate with. Don't stay too close to your buddies, as this tends to establish sub groups within the team.

3. Keep an open mind. Free yourself from either positive or negative biases toward the speaker or the subject.

4. Take notes, jot down questions as they occur to you, and make a point of raising those when it is your turn to speak. Remember key ideas.

5. Ask questions. The right question can bring an entire meeting to life.

EFFECTIVE MEETING GUIDELINES

The Team Leader and Team Facilitator are usually the driving force behind the team meetings. Although the Team's Sponsor is instrumental in creating the need for a team, and helps to establish the mission for that team, it is the Team Leader who structures and conducts the meetings.

The following guidelines will help to make your team meetings productive and meaningful.

1. **Planning the First Meeting**
   The Team Leader should review the objective of the team and its expectations together with the Team Sponsor, to ensure that the resources allocated to this team will produce the results expected.

   This is a good time to identify previous work that may have been carried out in the area where the team will be focusing. Often times problems reoccur because of poorly implemented plans previously tried by management. The data gathered during the previous problem-solving attempts can be useful and will save time in retracing those steps. The Team Leader's knowledge of this information will be useful for the team's reference.

   Clarify the roles within the team prior to the first meeting. It is important for both the Leader and the Sponsor to decide how their roles will impact the team. A preliminary review of their roles should be prepared for presentation during the introductory meeting. Also, identify the importance of proper planning. The first meeting is an important one, as the members will be looking for leadership and guidance for their future involvement on the team. A properly presented plan will demonstrate good leadership from the Team Leader.

2. Setting the Agenda

The Team Leader and Facilitator should set the first agenda together. The primary agenda should be quite general and provide enough time to review the issues at hand. Following this, the Team Leader can set future agendas. An example is the agenda illustrated below.

Sample Agenda

CITT TEAM MEETING AGENDA

Topic:	**Team Meeting**
Where:	**Main Boardroom**
When	**February 14th, 2002**
Time:	**1:00 pm – 3:00 pm**
Items:	**A) Review Agenda**
	B) Recap Previous Meeting
	C) Review out-of-meeting Assignments
	D) Discuss New Issues
	E) Member's Evaluations of the Meeting

Choosing the proper time for meetings is very important. The Team Leader should always provide on at least one week's notice, as a consideration for member's personal and work schedules. The agenda is distributed to each team member. As well it can be posted in high traffic areas such as near the punch clock, information board, or cafeteria.

The display of the agenda provides an opportunity for non-involved employees to be aware of the team's activities. This tends to strengthen the morale of the team members as they begin receiving an increased level of attention, from both co-workers and management. (See Example on following page)

_____ **Team**

Model Meeting Agenda*(adjust to your need)*

{normally drafted during the previous meeting... and then handwritten on a
flip-chart or white board before the meeting gets under way. This gives everyone
time to collect their thoughts and focus on the 'road map' that the agenda provides}

Purpose/Topic: *{Make it clear/simple, short and understandable}*
Where: *{location - with a map if necessary}*
When: *{spell date out for clarity - eg: **Tuesday, July 30th, 1992**}*
Time: *{eg: **One Hour - 1:00pm to 2:00pm**}*

Approx Time

Items: **1.0** **Review & Confirm Agenda** 5 min
*{Confirm everyone is there for the same reason before
 beginning ANY discussion... go around the table to
 get agreement on the agenda items and there order}*

2.0 **Recap Previous Meeting** 5 min
{Bring everyone's mind on track - time here saves confusion}

3.0 **Review Out-Of-Meeting Assignments** 5 min
*{Go over the out-of-meeting assignments. If they are large
 undertakings they should be a separate item on the agenda}*

4.0 **New Items/Ideas** 25 min
*{Keep the number of items down to a manageable level
 usually 1 to 3 are all you will be able to deal with}*

5.0 **Other Business** 5 min
{Use this only to catch short incidental items that pop up}

6.0 **Agenda For Next Meeting** 5 min
{Simply list the items your team wants to work on next}

7.0 **'Round the Table... Member's Evaluations of Meeting** 5 min
*{This is your team's KAIZEN aid - everyone must speak and
 should indicate what improvements could be made as well
 as what was particularly good}*

8.0 **End**

3. Be Prepared

Establish a Regular Meeting Schedule

Setting a meeting time and place well in advance of the meeting, eases a lot of the awkwardness and uncertainty for the team members attending. The meetings should last about 2 hours because of the number of issues which need to be reviewed and discussed.

There needs to be a regular time and place for the meeting so members can schedule ahead of time. Personal schedules, out-of-work activities or family requirements make it difficult for members to schedule on short notice. By providing a regularly scheduled time and place, members can plan their schedules accordingly. The best way to ensure member support is to involve the entire team in the decision. They must be present.

The scheduling of a meeting is important as not to interfere with personal schedules. If a particular event occurs such as the company softball game, which is affecting some of the team members, the leader should be flexible enough to either shorten the meeting or reschedule. However, minimize the rescheduling. If this becomes a common practice, it tends to interfere with other member's schedules and displays an appearance of non- commitment by the Team Leader.

Getting the Room Ready

The meeting room needs to have the proper facilities to make an effective meeting become a reality. Conditions for an effective meeting include the following:

- Provide ample space for everyone to work comfortably.
- Ventilation: make sure that your meeting room is properly ventilated. A stuffy room tends to lessen the attention of the members present.
- Position the seating in the room so that you create a boardroom-like environment. The most effective arrangement for team meetings is a "U" shape setting. Having the team members sit around three sides of a large table leaving the one end available for the Team Leader to orchestrate the session can do this. For larger meetings an open "U" shape is effective to provide the Team Leader freedom to walk around and use more non-verbal communication.
- Make sure that you provide enough writing space for your team members. Don't overcrowd the meeting table. It is annoying to make notes while sitting shoulder to shoulder with another member. Not only does this restrict the ability to write but it does not provide "personal space" which is a necessity for members to formulate their own thoughts on paper.
- Eliminate the noise. Designate a specific area for the meeting that is furthest removed from the plant floor activities. Employees become attuned to noises within the plant and those noises tend to trigger other thoughts that derail their attention from the discussions.

Examples are:

a) A forklift back-up horn sounding repeatedly. This would indicate to team members who normally work around the warehouse area that materials are either being placed or unloaded from a particular trailer.

b) Start-up alarms on equipment. Repetitive start-up alarms on particular equipment would indicate that there is some mechanical problem that is being addressed.

c) Loud banging noises coming from the plant. This tends to create an automatic distraction for all the group.

- Ensure that the temperature in the room is comfortable. If at all possible, set the thermostat for approximately 65°–68°. This makes it comfortable enough so the members can maintain a good level of attention.

- Make sure that there is enough lighting in the room. Replace the burnt bulbs before the meeting or secure an area with proper lighting.

- Visual equipment. Check to see if your visual aids and equipment are in proper working order and that you do not suffer any distractions during the meeting from faulty equipment. Avoid burnt light bulbs on overhead projectors or unstable flip chart stands.

- It is important for all members to write notes during the meeting and to collect their thoughts as discussions occur. Sometimes, in haste, members tend to forget these necessities. An effective Leader will always have extra pencils and paper on hand.

- Have fun. This is an important item that most Leaders tend to forget. Although the meeting is serious in nature,
Members do like to have fun. By occasionally introducing a light-hearted remark, or using a funny example, which happened in the plant and everyone is familiar with, it tends to break up any possible tension within the team or reduces the stress of the meeting.

4. Kicking Off the First Meeting

Greet Your Members As They Arrive
It is important to greet all your members by name. Where you are not totally familiar, be honest and introduce yourself as they enter the room. It is important to welcome each one personally.

Getting Started
It is important to start right on time. Although you do not want to appear cold or impersonal it is important to respect the meeting time and the integrity of those individuals who did attend on time. Those who are coming in late as you are starting should be encouraged to join the group quickly. Tact is essential here as you do not want to put anybody off, especially in the first meeting. The first meeting should set the example for prompt attendance.

Introductions
People tend to get nervous when placed in a new environment. By having those unfamiliar members or guests introduce themselves and state their purpose for attendance, it will ease the tension among the team and create a more comfortable meeting environment.

Review The Meeting Format
It is important for all members to appreciate the mechanics of an effective meeting. This is covered in both this chapter and during the CITT training. The Team Leader should emphasize the need for one conversation at a time, mutual respect and trust among the team members when adding their input. It is also important at this stage to review the objective of the team to ensure that everybody is focused on the purpose of the meeting.

Review The Purpose Of The Team
It is important to review the CITT team concept and gain co-determination as to the importance of teamwork, teambuilding, and joint problem solving. Where individual members present have not gone through formal CITT training, it is important to identify these individuals and later speak with the Team Sponsor and Quality Counselor to secure proper training.

Define The Roles
The Team Leader should go around the table asking each individual to describe his job function and what he expects to gain from the program. Five or ten minutes should be allowed for this exercise.
Also important, is for the Team Leader and Quality Counselor to identify their roles on the committee. This is done in a non-authoritative manner and should strengthen a positive and participative approach. Also describe, the Team Sponsor's role, regardless of whether the sponsor is present or not.

Set Your Ground Rules

Members should understand the specific ground rules that need to be established to help preserve the effectiveness of the meeting. Such ground rules include:

- Arriving on time

- Being prepared

- No cross talking

- Stay on topic

- Respect each other's opinions

- Use facts not emotions

- No power playing allowed

- Contribute wherever possible

- Be a team

5. Documenting Your Meeting

When engaged in any kind of meeting, it is important to develop the documentation needed for follow up. This is done in a number of ways. Identify a Note Taker – not a secretary - from among the members who will play this role on an ongoing basis. This individual should write clearly and should work with the Team Leader after the meeting to review the notes. This and other recording activities are important for the following reasons:

- The project could last six months or greater and the Team may lose or gain members along the way. Good records help new members catch up and keep old members informed of developments.

- Clearly illustrated records help educate and win the support of people in the organization who do not have time to read or listen to lengthy reports.

- Frequently, presentations about a successful project are widely circulated within a company. Having up to date records makes it easier to prepare for these presentations.

- As projects progress, Teams may have to retrace their steps to track down a particular problem. If an error has occurred during the process, good records certainly make this easier.

The use of an established meeting record format is essential to maintain standardization.

The following formats have been effectively used within companies of all kinds. Take it as a model and modify it to suit your needs.

The next two pages illustrate what a 'meeting note' form might look like. These have an added reminder of the problem solving process typically followed by continuous improvement teams.
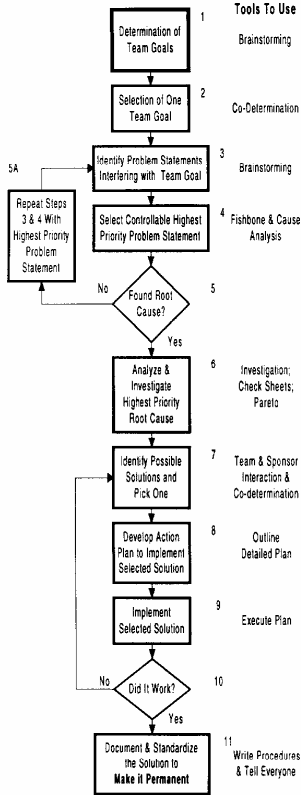**Feel free to copy, modify and adapt these forms as you see fit. You may wish to add your logo and company information to make it useful for you and your team**

CITT - MEETING ACTION SHEET

Date		Team	
Time			

Time (minutes)	Clarify objective			Agenda outcome/action taken/notes
				1.
				2.
	Review roles	Leader	Recorder	3.
				4.
	Review agenda	Facilitator	Timekeeper	5.
				6.
	Work through agenda items			7.
	1.			
	2.			Next meeting agenda items/notes
	3.			
	4.			
	5.			
	6.			What went well?
	7.			
	Review the meeting record			
	Plan the next agenda			How could we improve the next meeting?
	Evaluate the meeting			

Source: Developed by USAF Medical Centre, Wright-Patterson (WPMC), 1991.
WPMC adapted the format from a meeting worksheet developed by HCAI Quorum.
"Striving Toward Improvement" Joint Commission on Accreditation of Healthcare Organizat'

HIGH PERFORMANCE SOLUTIONS

Continuous Improvement Solution Process

Tools To Use

Step	Box	Tool
1	Determination of Team Goals	Brainstorming
2	Selection of One Team Goal	Co-Determination
3	Identify Problem Statements Interfering with Team Goal	Brainstorming
4	Select Controllable Highest Priority Problem Statement	Fishbone & Cause Analysis
5	Found Root Cause?	
6	Analyze & Investigate Highest Priority Root Cause	Investigation; Check Sheets; Pareto
7	Identify Possible Solutions and Pick One	Team & Sponsor Interaction & Co-determination
8	Develop Action Plan to Implement Selected Solution	Outline Detailed Plan
9	Implement Selected Solution	Execute Plan
10	Did it Work?	
11	Document & Standardize the Solution to **Make it Permanent**	Write Procedures & Tell Everyone

5A — Repeat Steps 3 & 4 With Highest Priority Problem Statement

Notes

Meeting Notes – Items Discussed

Over

CI Meeting Notes & Action Sheet

HIGH PERFORMANCE SOLUTIONS

Continuous Improvement Solution Process

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5A — Repeat Steps 3 & 4 With Highest Priority Problem Statement

Team/Group _____
Why/Purpose _____
When Date _____ **Start** _____ **Duration** _____ **Min.**
Where/Location _____

Attendees	Attendees	Absent	Copies To:
			☐
			☐
			☐
			☐
			☐
			☐

Today's Agenda
Confirm Agenda & Timing
OOMA's: _____
_____
Item 1: _____
Item 2: _____
Item 3: _____
Item 4: _____

Make Action Plan & Assign OOMA's
Next Meeting Date _____ **Where** _____ **Agenda:**
1. _____
2. _____
3. _____
'
Round-the-table… What went well? _____
One Item to improve for next meeting _____

Discussion/Decisions Reached	Comments

Out of Meeting Assignments (OOMA's) – What to Do	By Who	By When Due
1.		
2.		
3.		
4.		
5.		

Over

In addition on to the notes taken by the secretary or record keeper, using the above format will help organize the information.

It is advisable for the Team Leader to allow for 10–15 minutes after the meeting to rewrite the information listed on the flip sheets and incorporate them with the notes taken by the secretary. This is the joint responsibility of the Team Leader and secretary. This helps to ensure a more easy-to-read summary. The document often can be distributed to the team members along with the agenda for the next meeting. These are simply known as meeting notes or minutes.

6. Final Tips
Get Comfortable
Uncomfortable meetings tend to distract members from the actual purpose of the meeting. Members must know that they are free to bring their opinions to the meeting. A no-blame environment must be established up front. Food and cigarettes should not be allowed for obvious reasons.

Complete the Agenda
An agenda is established so a Team can stay on topic and function in a controlled manner. The establishment of an agenda requires good planning by the Leader and should be planned in a realistic fashion. Agendas which often run out of time or have numerous carry over items should be viewed as a lesson towards setting more realistic and conservative meeting plans.

Wrap-Up
The wrap-up is an important aspect of any meeting. To recap and summarize the group's input helps to refocus the Team's energy needed to determine the next step.

Evaluations
This is the time allowed in each meeting for all members to provide a critique of the effectiveness of the Team and meeting. This information is valuable for the Team Leader to help improve the meeting format. It is also important for the members to focus on improvement activities. Each member provides an opinion and critique about the meeting. Comments should be general and must never point fingers or blame individuals if concerns do arise.

The effectiveness of a meeting needs to be determined in order to secure improvement to the format. Normally the Team Leader will have success if the following questions are answered.

- Are we doing the right things?
- Are we doing things right?

More systematic evaluation methods can be used if the Leader feels such a review is necessary.

- How did this meeting go, what didn't we like?
- How was the pace, the flow, the tone of the meeting, did we handle items in a reasonable sequence? Did we get stuck?
- What might we do differently, what should we do that we didn't do, do more, do less, or not at all, was it just right and continue as is?
- How well did we stay on topic?
- Did we look for problems in the system rather than blaming each other?
- How well did we discuss the information, were we clear, were we accurate?
- How well did we respond to each other's questions, were we satisfied with the responses provided?
- Any other comments, observations, recommendations?

Although sometimes written evaluation forms are used, it is more advisable to discuss informally. It is important for everyone to voice their opinions and maintain an open communication channel. The use of evaluation forms is effective in larger more formal group settings. However, the CITT meeting tends to rely on informal methods and open discussion.

MEETING PROBLEMS TO BE AWARE OF

As in any process, there are particular problems that might arise which could lead to disruption or ineffectiveness among the team. The most common concern is a lack of participation from the group.

1. Lack of Participation

Common causes are:
- A new group meeting for the first time
- Reluctance to speak due to the presence of an authority figure or presumed expert
- Members not being properly trained in meeting skills
- Lack of interest in the subject
- Peer pressure
- Confused objectives

The best way to deal with any lack of participation begins long before the meeting. Proper planning on the part of the Leader is imperative. Informing the members of a meeting and its purpose prior to the meeting day, and responding to the Team and individual needs during the meeting, should eliminate most of these initial concerns.

However if you have prepared for the meeting and still encounter a lack of discussion you might try some of these techniques:
- Restate or reword the question
- Ask simple open ended questions related to the subject
- Bring in a case problem and share an example which is common to all
- Ask for examples of personal experiences from the Team

2. Rushing to the Quick Fix

You have probably attended meetings that have the appearance of being highly participative. Everyone leaves the room feeling the meeting was a great success because everybody could agree quickly. However there is a hidden danger here because, jumping to quick solutions often fails to address the true root cause of the problem. An effective Leader should keep the following tips in mind:

- Delay acceptance of a quick solution
- Throw the idea back to an individual or the group with a how or why
- Ask for clarification of a detail
- Ask for examples
- Seek a contrary opinion or another course of action
- Give the team an opinion that is contrary to the one being discussed (play the devil's advocate)
- Lead the Team discussion away from trivial or irrelevant issues

3. The Problem Members

In most meetings you can maintain control by guiding the participants through your agenda, however, even in a well-planned meeting, problems with individuals might arise. There are no pat solutions to these problems but there are some actions, which you may want to keep in mind:

- Dealing with the over talkative participant. Understand the reasons why they are so vocal. The individual:
  - May desire to dominate the meeting
  - is a fast thinker, or
  - May have organized thoughts, may be very logical.

- Basic strategies to deal with these individuals include:
  - Directing the discussion to someone else
  - Explaining equal distribution of time, or
  - Talking with the person outside the meeting.

- Understand why some members want to play the silent participant. The individual:
  - May be habitually quiet
  - May lack self-confidence
  - May have no interest in the subject, or
  - May consciously or subconsciously resent the objective of the meeting.

- How to encourage and stimulate the quiet individual:
  - Talk to the person outside of the room
  - Ask a question the person is able to answer, or
  - Praise the person for participation

4. Disagreements Among the Team

- Sometimes arguments occur among participants. These situations can be dealt with by:
  - Keeping the disagreements from spreading to the rest of the group,
  - Identifying the discussion point and trying to clarify each member's point of view, or
  - Asking another member for a different subject that will distract the continuance of the discussion.

- Ways to handle arguments also include:
  - Restating each other's position
  - Finding a mutual meeting ground between the two members
  - Being sensitive to potential conflict and skillfully handling emotions which might arise
  - Refocusing attention towards the objective of the meeting and stressing the importance of not allowing emotions to interfere with the success of the Team.

KNOW THE DANGER SIGNS

Teams are often ineffective when their efforts no longer outweigh what individuals working alone could accomplish. If we look back to our "self-oriented behaviours" we see that behaviours are critical to the success or failure of a team. An effective Team Leader simply answers all concerns and spells out the control measures needed to prevent a reoccurrence, while maintaining sensitivity to the various members.

The effective Team Leader and members are wise to keep the following danger signs in mind:

- Pressures to conform
- Jumping to quick solutions
- Submitting to dominant individuals
- Being distracted by hidden agendas
- Too much attention to the time
- Ongoing disagreements
- Premature discussions about solutions, without properly identifying root causes

CONCLUSION

Effective meetings are crucial to ensure the steady progress of the Team. The more productive the meeting, the more productive the Team. Team Leaders must understand the mechanics of properly planning and conducting meetings. More importantly members need to understand effective listening and discussion skills. All members must be aware of normal human behaviours, which tend to affect responses and reactions to issues being discussed. By maintaining a good record keeping system you have a diary of the issues that were discussed. This provides a good platform for building further information and problem analysis.

The CITT process is a systematic approach that relies heavily on the proper balance of teamwork, technical skills and good job knowledge. Most commonly a Team will fail if emotions override facts and data. By constantly focusing on the cause of a problem, and trying to separate emotions from facts, Team Leaders will have the greatest chance for success of the program.

REVIEW

- Meeting Behaviours
  - Task Oriented Behaviour
    - Initiator
    - Information Seeker
    - Information Giver
    - Clarifier
    - Summarizer
    - Co-determination Tester

  - Relationship Oriented Behaviour
    - Harmonizer
    - Gate Keeper
    - Encourager
    - Compromiser
    - Tester

  - Self-Oriented Behaviour
    - Competitor
    - Disrupter
    - Depender
    - Skeptic
    - Abstracter

REVIEW

- Use 10 effective listening techniques for receiving information

- Use 9 effective discussion skills for giving information

- Use 30 leadership skills to manage meetings effectively

- Watch for problem signals

- Meeting Guidelines
  - Clarify roles before first meeting
  - Set the agenda and time
  - Set ground rules, format, purpose
  - Prepare, prepare, prepare
  - Document the meeting