Effective Meeting Handbook

Our goal for an effective meeting: Don't waste busy people's time!

We've all been there, sitting in a meeting (face-2-face or virtual) and stopped listening after a few minutes, glad to finally have some time for that important email we need to send out to the client before CoP, daydream about the weekend or start checking social media.

With this Handbook we want to stop this phenomenon and make meetings great again!

Our Meeting Checklist

1. Initiate	
a. Necessity	
▢	Is this meeting <u>absolutely</u> necessary and is it the most effective means to achieve your objectives? The costs and efforts involved for all participants for whom this might be a distraction from higher priorities must be considered.
▢	Might it be better running the meeting as a remote/virtual session? Potential benefits: travel cost saving, convenience, execution efficiency due to less "social warm-up" starting and closing a meeting, etc. Risks: hampered relationship building, conflict resolution, brainstorming and to be only listening to the "loud voices" (see **Virtual Meeting Etiquette** below)
b. Planning ahead - Logistics	
▢	What is the most appropriate meeting type? Every type requires a different approach so we must plan accordingly (see **Specific Meeting Types** below).
▢	Which participants are critical to attend? Only include people who are vital to achieving the stated purpose. Never over invite but make certain that decision makers or empowered delegates can attend.

▢	Who might be offended by being excluded from the meeting? We are well advised to consider these effects and proactively handle expectations.
▢	How do we best manage expectations with all participants and increase their engagement? At the very minimum the meeting invite is required to include a self explanatory agenda. In some cases a carefully drafted primer email may be beneficial.
▢	Are all participants required to join for the whole duration of the meeting? Prioritise the agenda based on resource availability. I.e. front loading scarce resources like experts and then release them from the rest of the meeting if they are no longer needed.
▢	How long does the efficiently executed meeting need to be? • 25 or 40 minutes instead of the standard 30 or 60 • Run a short (max 15 minutes) Stand Up meeting Everyone stands for the duration to ensure it goes quickly (ideal for status updates and short term planning) • If it has to be longer than 60 or even 90 minutes we must consider scheduling a break
▢	Are our recurring meetings still effective? Recurring meetings have the tendency to become ineffective over time when neither the organiser or the participants frequently challenge its purpose and value.
▢	Has the room booking for our cancelled meeting been released? Meeting room availability is typically an issue (depending on team culture). Conference rooms must not be monopolised unnecessarily (i.e. for recurring meetings) Cancel the room when not utilised.
▢	Is meeting room necessary at all? Especially in 1-on-1 meetings it might be a good idea to go for a "walking meeting" or meet over coffee/lunch/dinner as these formats allow for relationship building opportunities.
▢	What material is needed to support the meeting? Other than e.g. presentations or handouts, identify all supplies needed (markers, flip charts, whiteboards, paper, pens, etc.)
▢	How is the meeting going to be captured? In case the meeting host has not got the capacity or capability to effectively capture the meeting themselves identify someone to act as scribe (taking meeting minutes and keeping time) or maybe record the audio/video (i.e. in a training session)

	c. Personal Preparation
▢	Are we up to date with the latest status of the relevant topic? Ensure to be informed regarding previous communications, expectations, and commitments. Review notes from the most recent meeting, gather current status of previously agreed action items and any follow up required.
▢	Will the other participants have a different expectation/agenda? Have thought about where their alliances lie (our firm, client, 3rd party)? How do they feel about the subject (be critical with your own biases)? Gauge their attitudes and beliefs prior to and during the meeting. Prepare an approach and a response to pushback and objections in advance.
▢	Is the meeting at risk of being hijacked from the start? Prepare the kick-off (see **The Starting FOUR Sequence** below)
▢	What is our role in the meeting? We are clear before the meeting starts about our required inputs and outputs and how we can support both. We also understand our role (i.e. facilitator, presenter, SME, scribe, champion, decision maker, participant, observer). If we have a contributing role we are prepared, ready and know our stuff.
▢	How can we help other participants to come prepared? We might not create a level playing field in all types of meetings but in most it makes sense to share the current status, presentation or other supporting documentation in advance.
	2. Execute
	a. Start
▢	Arrive early to setup the room, start the call, WebEx Meeting, Skype, etc.
▢	Conduct a roll call and for efficiency, walk through the invitee list instead of asking "Who's on the call?"
▢	Start effectively and with a purpose (see **The Starting FOUR sequence** below)
	b. Run
▢	Set the context for the discussion with a concise summary of issue, history and status - demonstrate in-depth knowledge.
▢	Follow the agenda and keep participants focused on the topic at hand.
▢	Manage interactions (i.e. temporarily sideline off-topic discussions as an item to be discussed another time and note them down in a "Parking Lot List")
▢	Manage time. Allow time for a proper close and don't allow discussions to consume more time than available.

▢	Agree in the meeting how the newly arisen off-topic discussion could be most effectively resolved "offline".
	c. Close
▢	Recap or summarise key points/decisions verbally
▢	Review or update parking lot
▢	Determine if all objectives were reached (as a group)
▢	Prompt for questions. "What questions do you have?"
▢	Identify and assign action items, determine owners, and set expectations
▢	Get agreement on a path forward (hopefully not another meeting)
3. Wrap Up	
	a. Summarise
▢	Follow up quickly after the meeting with a summary of decisions and actions.
▢	Send it to all participants and (if appropriate) also to other interested parties not in attendance.
	b. Reflect
▢	Were the stated objectives reached and what could be done better next time?
▢	Was the time used wisely/efficiently?
▢	Which participants might have thought it wasn't worth their while and why?
	c. Follow Up
▢	Monitor all action items and provide updated status communication.
▢	Post meeting minutes or notes to the approved centralised location (if applicable)
▢	Update Case Management System, Action Log, etc. (if applicable)

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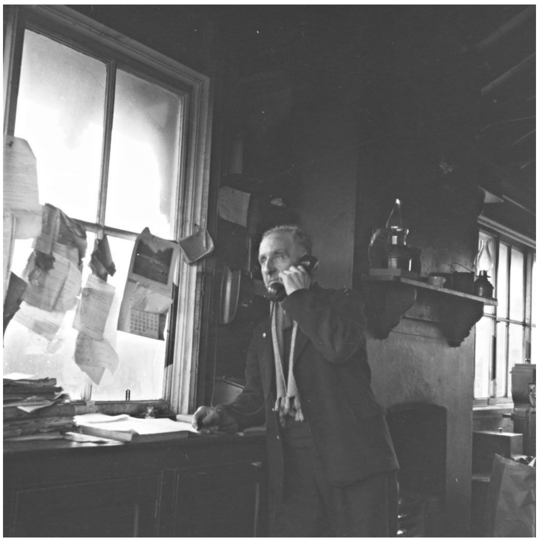
Virtual Meeting Etiquette



Virtual meetings are becoming more and more common in our law firms so it's important that our teams establish etiquette guidelines and meeting norms. Research indicates that our guidelines can make a difference in the quality of our virtual meetings and their outcomes.

We apply common sense and critical thinking to these guidelines as i.e. the size of the audience matters. For very large virtual events some of these suggestions need to be adapted.

1. Should we dedicate time to focus on team building?

The quality of relationships that exist when the meeting starts impacts the quality of conversations that occur during the meeting. If we run a regular meeting, we set aside some time to build relationships among team members. We let people catch up and connect maybe by opening the phone lines early if we can't always designate time during. We can also plan to include relationship building questions but be cautious not to lose too much time.

2. Does silence denote agreement?

It will depend on the decisions' impact levels but in most cases we consider it too risky to assume agreement when the audience is silent.
If the meeting can be classified as casual, internal and informative we as meeting leaders can decide to tell participants before the meeting starts that silence denotes agreement. Why? Because virtual meetings give participants an excuse to withhold their active participation and reframe themselves as observers. When people conceal their opinions in the moment, they are unlikely to actually buy into the outcome of a discussion.

3. To mute or not to mute?

Going on mute allows participants to feel invisible so they are free to do other things - things that would never be acceptable in a face-to-face meeting. Muting can kill a lively discussion, shared laughter and creativity. So to not mute the whole call centrally can help people focus and avoid multitasking. A certain level of background noise is acceptable.
We do however ask participants to mute themselves when the noise is interfering with the meeting.

4. Should we use video?

Seeing each other helps bridge the distance during virtual meetings. Everyone is more engaged because they can see each other's emotions and reactions, which humanizes the virtual room, helps people connect and most importantly encourages them to stay focused and active in the discussion.

5. How do we interject when someone else is talking?
   Or, how do we avoid talking over each other?

Some people are comfortable interrupting others and so they get a lot of air time. It's important that everyone has a chance to speak. If we are hosting a meeting with a small group it is probably most effective to be sensitive to this issue and to frequently check in with the rest of the group if they disagree.
If we are hosting a meeting for a large audience, maybe in a Townhall meeting style, then we may want to consider using the hand raise icon in i.e. WebEx. The Host or Presenter can see who had their hand up first. We can ask participants to post questions in the chat or in the QA panel and those will be handled at a designated time. We also assign someone the role of moderator who will be the only one to manage the discussions. This may or may not be the meeting leader, but we need a diplomatic and respected person to perform the role if things get heated or noisy. Respect should be the norm in all virtual meetings.

6. How do I get the discussion back on track when it's drifting off topic?

At the start of the meeting we can introduce the jellyfish ground rule: If we feel the conversation is heading off course or delving into an inappropriate level of detail, we can and should employ the word to indicate that opinion.
We simply say "jellyfish" or "I think we're having a jellyfish moment" or "Did I just see a jellyfish swim by?" It's a catchall for "Why don't you take this offline — the rest of us would like our meeting back."
Why Jellyfish? They are those creatures that float aimlessly...

7. Is it ok to discuss client or firm information in a public location?

People often feel anonymous in a public setting and assume that no one will understand what their conversation is about. We are careful about this.
We never know when a client, allie or competitor is nearby and we therefore cautiously consider confidential information and an appropriate environment for our calls.

8. Should the verbal "one-after-the other" status updates be avoided?

The "one-after-the-other" status update consumes large amounts of time and is, more often than not, a waste of time for the rest of the audience waiting their turn.

Alternatively we implement virtual Stand-Ups where the team (no more than 8) has got no more than 15 minutes for everybody to cover:
- what I did yesterday
- what I am planning to do today
- what the issues I need help with are (and who needs to help resolve this “offline”)

This way all the "need help with" items can be discussed in sub-groups offline and the rest of the team can start their productive day immediately.

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Specific Meeting Types

1. Problem Solving Meetings
    a. We explore current perceptions of the problem
    b. We get agreement on the definition of the problem
    c. We determine group perspective on causes of the problem
    d. We outline risk and costs associated with not fixing the problem
    e. We jointly explore solutions for solving the problem
       WARNING: classical brainstorming can be the worst option for a creative, inclusive and diverse problem solving process as only the loud voices are often heard.
    f. We choose the most appropriate option considering things such as time, resources, cost, risks, ROI, etc.
    g. We gain agreement from participants and if necessary any sponsors

2. Informational
    a. We welcome and introduce the audience
    b. We give an overview of change or news
    c. We share the impact on specific audiences
    d. We cover timeline and what to expect next
    e. We allow time for Q&A

3. Project
    a. We review short, mid, and long term goals along with overall project objective
    b. We give an update on recent achievements
    c. We share the status on new issues, risks, root causes, solutions, and prevention (if necessary)
    d. We address outstanding tasks and milestones
    e. We discuss ownership and potential obstacles preventing success
    f. We agree on next steps

4. Review and Planning
    a. We evaluate or measure the output or effectiveness of a process
    b. We provide/collect information with which to make decisions
    c. We establish consistent and measurable performance indicators
    d. We focus our discussion on continuous improvement

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The Starting FOUR Sequence

Meeting leaders often start meetings by reviewing the agenda, if they have one, and diving straight into the first agenda item. As a result participants often aren't sure of the meeting's purpose, the outcomes or products to be produced or why the meeting should be important to them.
In essence, meetings often begin with an ineffective start that can negatively affect the rest of the meeting.

We execute an effective start that includes the following elements:

1. We start the meeting on time
2. We make introductions, if needed
3. Our opening words include the Power Start:
    1. We let the participants know the
        i. purpose of the meeting
        ii. the expected outcomes
        iii. or the product to be produced
    2. We explain why the meeting is important to the participants and why they will benefit
    3. We describe the role the participants will play or the authority that has been given to them
    4. We get the participants involved immediately through an engagement question or activity that furthers the meeting purpose
4. We then confirm the agenda by getting agreement

In essence we establish:

- What are we jointly trying to achieve?
- Why should we all care about the objective?
- How are we going to achieve it?

The start can take as little as five minutes and as long as forty-five minutes or more depending on the size of the group, the length of the meeting, and the steps you use.

Options for Ground Rules

Establishing ground rules when we start a meeting with a new group of people helps to shape the parameters of acceptable and unacceptable behavior. This might be difficult to communicate and hopefully in many cases not necessary (as an effective meeting culture is already established)

1. We Don't Multitask
    a. We turn our phones off or at least on silence and don't leave phones on the table (out of sight out of mind)
    b. We close our laptop unless absolutely required for the purpose of the meeting
    c. We close email and all non-required applications that can distract us
    d. We display Busy, In a Meeting, or Do Not Disturb on instant messenger apps
2. We focus our attention only on the purpose of the meeting
3. We actively participate in discussions and activities
4. We respect others
    a. We listen (not to respond, but to understand a potentially unknown perspective)
    b. We let one person speak at a time
    c. We challenge ideas, not the person
    d. We keep an open mind and challenge our own biases
    e. We hold back our opinion when people are "thinking aloud" or when the team is brainstorming
5. We respect ourselves
    a. We are open, honest, and thoughtful
    b. We don't withhold our opinion for the wrong reasons (shyness, politeness, etc.)
6. We are mindful of non-verbal communication (eye rolling, tapping, fidgeting, sighing, etc.)
7. We welcome all questions - there are no stupid questions.
8. We try and have some fun!