Best Practices for Effective Meetings

BY ANNE SCARLETT

Tips on how to make the most of meetings—as a facilitator and as an attendee.

WHY ARE MEETINGS OFTEN the butt of work-related jokes? Why do we sigh with distain when we see our calendar loaded with meetings? Quite simply, many meetings are poorly run, resulting in little or no specific outcomes and action items. Conversely, a well-run meeting—with clients, prospects, subcontractors, industry peers in professional associations—is actually considered a marketing and business development plus. When clients participate in a productive meeting led by their consulting engineer or architect, then it bodes well for the overall client-professional experience.

Not all meetings are created equal. They vary in terms of structural requirements, contexts (in person, by phone, in office/out of office), and intentions. Meeting types in the AEC industry include: 1. *Short-term planning*, for project teams; 2. *Long-term planning*, such as a senior leadership retreat; 3. *Creative brainstorming*, including design sessions with the client; 4. *Information transfer (data dump)*, such as a training seminar, or an all-office meeting where senior leadership shares firm direction with the staff.

How can you, as a meeting leader or attendee, walk away from the meeting feeling like it was time well spent? Time is our most valuable asset, and meetings do not always respect—nor capitalize on—our time and contributions. Take it upon yourself to make a change.

As a Meeting Leader

Facilitation is the optimum word here. You are responsible for creating an environment in which the others can participate, observe, and take-away. You *facilitate* others' ability to maximize their contributions. Even if the particular meeting is intended to be a one-way download of information from senior management to the staff, you still need to create a situation to ensure the attendees are active listeners and that they have their needs and expectations met.

>Invite the right people. Consider your meeting objectives and expected outcomes. Carefully choose those that would be the best composition and contributors to the mix, like a recipe. Often, there will be individuals that—because of their status or position—either "should" attend or "want to" attend. Yet, in your judgment you may determine that those people will neither add to the meeting, nor will they benefit from attending the meeting in a more observational role. In those cases, it's important to identify your hesitation in including them, and then have a quick talk with the individuals about those hesitations. Perhaps there is a misunderstanding. Perhaps it requires gently letting the person know that it is not personal, but that at this time it makes the most sense. Whatever you do, be specific, discreet, and respectful.

>Send out agenda—and expectations—in advance. Keep your agenda tight, and put initials in areas where others are to take charge of a particular element. In addition to the agenda itself, make sure to include a brief bulleted summary of expected outcomes for the meeting. It may be as simple as: "We will conclude with clarity on our individual responsibilities for this week's project." Or, "We will come up with a minimum of three schemes for the schematic design." Or, "We will bring the client to a point of decision on a particular sticking point."

>Where it makes sense, consider using a consent agenda. The use of a consent agenda helps to solve meetings in which people are spending more of their time reporting, rather than discussing, resolving, or strategizing. The consent agenda is a single agenda item that covers a number of routine issues needing team approval, but not necessarily in-person discussion. If a team member feels that discussion is warranted, any item may be removed from the consent agenda by simply requesting that it be removed. The removed item is then placed elsewhere on the meeting agenda. The entire consent agenda is then acknowledged and validated by the team prior to moving on to strategic matters. (See Scarlett Letter blog post #114 for details).

>Use a parking lot. To remain acutely focused on the meeting's intent, have a flip chart or white board handy. This will serve as the parking lot, and any time there is a worthy issue brought up that is outside of the context or intent of the meeting, it gets listed on the parking lot. At the end of the meeting, the parking lot should be categorized by urgent and non-urgent items. "Next steps" should be assigned

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to the attendees for those that are deemed more urgent/important—exploring a new idea; researching answers to a particular problem; initiating an activity. Often, the parking lot items are bigger than they first appear, so they may in themselves need to spin off into meetings in their own right.

>Start on time. Start meetings on time even if there is only one other person in the room. As others drift in, simply continue moving along. If you'd like to be polite, you can stop for a brief moment, welcome them, and let them know what point you are in the agenda. Do not backtrack or repeat what you have already said. Sometimes, an integral meeting contributor (and decision-maker) will be late. Consider making a game-time decision by reorganizing elements to see what you can accomplish without him or her. When that person finally arrives, present a brief summary of what has been discussed thus far, and weave that back into the original agenda. End the meeting by reiterating the importance of timeliness for the sake of the team. Attendees will see that you are serious about on-time starts, and will surely start coming on time as expected.

>End on time. Have an established meeting timeframe. The majority of well-planned meetings should not run long. The only potential exception is a creative or brainstorming meeting, where juices are flowing and ideas are abundant. In those cases, you may want to respectfully ask for additional time from your attendees.

>Get feedback. Allow a few minutes at the end the meeting to ask for feedback. You may even want to have people rate the meeting privately or right there on the spot (scale of 1-5, 5 being most effective). Offline, feel free to ask the attendees for additional input or requests. You won't be able to satisfy everyone, but at least you will have heard them. If the group shares common goals and has the firm's best interests in mind, then all should wholeheartedly strive to make the meetings productive.

>Don't be satisfied with "the usual." Sometimes we get caught in a rut of going to the same meetings week after week, month after month. Maybe those meetings have lost their useful life. Meetings do have expiration dates. For example, one firm I worked in held integration meetings (from a merger) for about one year longer than necessary. Another firm I consulted used an old and tired agenda for project manager meetings that had long since outlived its usefulness. At least once a year—probably during your strategic planning sessions—analyze the effectiveness of your firm's meetings. At a minimum, review all the "standing" meetings that are held both internally, as well as externally with clients and consultants, as part of your overall work process. Which ones should stay? Which ones should go, or be revitalized?

As an Attendee

Even if you are attending rather than leading, you do share responsibility for the meeting's success. Do not be complacent and complain. Instead, recognize that you, as an attendee, can set a positive behavior, while motivating others to do the same.

>Come prepared. Read the agenda in advance. Have some thoughts/ideas/questions in writing. Collect any information that you need to prior to the meeting, and have it organized and on hand (no running back to your desk).

>Make quality statements. You will be measured by the quality, not the quantity, of your contribution. Digressions span the gamut from the senior partner that wants to tell yet another story to the mid-level manager that repeats what others have already said just so he can hear himself speak and feel involved. Don't add to this problem. There is no need to restate what others have already said unless you add something that will make a difference. People who repeat and restate are simply adding to the length of the meeting. If you truly agree with something, simply say "I agree." And mean it.

>Arrive early (especially for external meetings). Never be the person who walks in late. Use your pre-meeting time to gather your own thoughts, review notes, etc. Further, take the opportunity to connect with other attendees on a more casual basis before the meeting commences. This is where relationships can grow and strengthen.

>Give your feedback. If you have attended a really well-run meeting and have ideas on how to improve a particular meeting type, don't be shy. In your most diplomatic way, present your ideas to the meeting leader, off-line. Be supportive of their current efforts. Make sure you support your claims, for example by sharing another context/story in which a particular meeting technique worked well. Preface your suggestions by stating they are just for consideration, and offer to help in any way you can if needed.

Meetings are a broad—and often controversial—topic in terms of their real value. While some rebel companies have ousted meetings all together, the majority of firms in AEC continue to rely upon meetings to serve clients and move the company forward. They play a significant role in our professional life; let's make them the best they can be! MSC