Ingredients for Effective Meetings and Team Communication

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Working effectively in teams includes running and participating in meetings. These meetings may be face-to-face (F2F) or virtual, depending on the availability of technology and the preference of the team leader and members. The authors recommend that the first meetings of a forming team be F2F to establish strong associations with each other and the required outcomes of the project to which the team has been assigned.

It is critical to set the proper tone during the initial team meetings. As introduced in, Roles and Responsibilities for Launching Teams, new teams will progress through a series of stages in their behavior towards each other and their approach to project tasks. Each team member has something important to contribute, whether it is experience or expertise. The team will engage in serious work, but that work can also be a fun experience that contributes to the organization.

Many people have learned to dislike meetings. When a meeting is disorganized with no agenda, is poorly facilitated, or is disrupted by inappropriate behavior from attendees, individuals develop an aversion to all meetings. It is the responsibility of the team leader and facilitator to plan ahead for a clear, targeted agenda, effective materials, prepared attendees, and significant content.

Effective meetings start in the mind of the leader long before attendees show up. Preparation is a requirement for meeting success. Good preparation starts with identifying the purpose of the meeting. What is to be accomplished? Who needs to be involved to accomplish this purpose? Does this purpose require individuals to be F2F, or can the meeting be accomplished through teleconferencing, or even email, if information does not need to be received simultaneously?

Should a Meeting be Held at All?

One of the fastest ways to lose motivated team members is to hold unnecessary meetings. It is critical to communicate effectively with team members, sponsors, stakeholders, and customers, but it is not helpful to spend valuable time reviewing information that can be available when the recipient is personally ready to access it.

Meetings are valuable when team input, discussion, and joint analysis are required. F2F meetings are crucial when the team leader, facilitator, or process owner needs to experience the full range of communication channels, most notably body language and tone. Discussion boards provide group input in words without benefit of body language or tone of voice. Teleconferences provide words and tone but not the nuance of seeing the individual as he or she presents ideas. Video-conferencing comes close to F2F and is becoming a more frequent alternative as budgets shrink

and workloads increase. Many laptop computers now include a web camera, further enabling use of alternative meeting venues.

In preparation for a meeting, it is important to think of the best venue for delivering the proposed content. Can the information be made available on a shared drive, virtual workspace, through a social networking group discussion area, or simply in an email with attachments? If immediate discussion is not required, asynchronous team member access may be a more efficient delivery medium.

Figure 1 is a generic representation of a meeting flow. Planning before the meeting is important. Attendees are more effective when they know what they will be expected to contribute during the meeting, so it is imperative that the meeting leader envision and articulate the intended outcome of the event. Starting the meeting on time respects participants, and staying on agenda and on time allows all to manage their schedules appropriately. Closing the meeting with a summary of action items and decisions reinforces progress and establishes accountability. Finally, follow-up ensures that assignments are tracked and measured to completion.
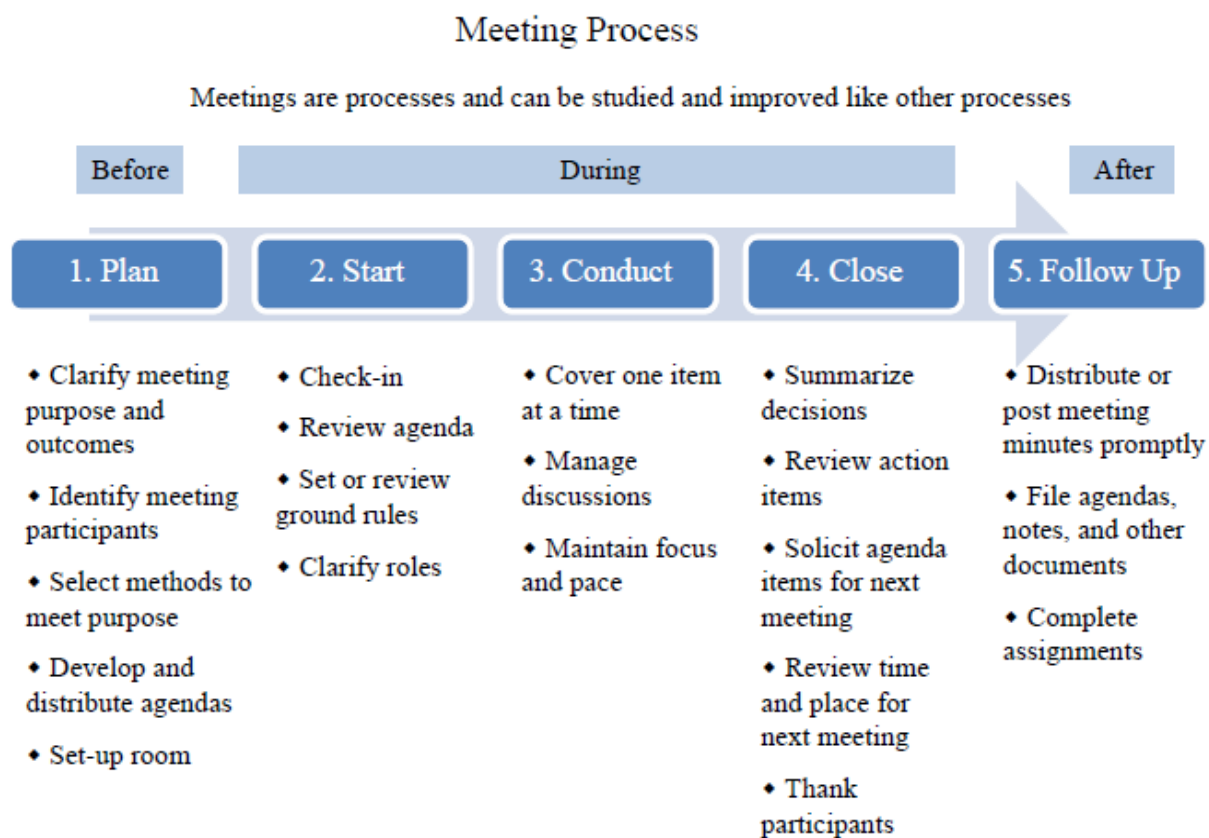
Meeting Process

Meetings are processes and can be studied and improved like other processes

Before	During			After
1. Plan	**2. Start**	**3. Conduct**	**4. Close**	**5. Follow Up**
• Clarify meeting purpose and outcomes • Identify meeting participants • Select methods to meet purpose • Develop and distribute agendas • Set-up room	• Check-in • Review agenda • Set or review ground rules • Clarify roles	• Cover one item at a time • Manage discussions • Maintain focus and pace	• Summarize decisions • Review action items • Solicit agenda items for next meeting • Review time and place for next meeting • Thank participants	• Distribute or post meeting minutes promptly • File agendas, notes, and other documents • Complete assignments

Figure 1: A Generic Meeting Process Flow

Planning the Meeting

Once the decision is made to hold a meeting, whether F2F or virtual, it is time to plan the following details:

- Purpose and outcome
- Participants
- Length
- Location
- Preparation
- Notification

What is the specific reason for holding the meeting? Clarifying the topic and content of the discussion is crucial. Identifying the intended outcome of the meeting and determining what deliverables are expected at the end of the meeting will form part of the invitation message to participants and interested stakeholders.

Organizing the content of the meeting into timed blocks before developing the agenda not only provides the skeleton of the agenda but also create the timeline for the meeting. Visualizing the meeting while creating the topic items serves as a dress rehearsal and supports adequate preparation.

Identifying the meeting location, date, and time at the top of the agenda gives the invitees an idea of what, when, and where for their own planning purposes. Sending out an electronic meeting invitation if the participants have a calendar function on their office computing network is a very efficient way to invite potential attendees. Attaching the agenda to this calendar notice is a positive step. It is best to send the invitation and agenda several days ahead to allow participants to prepare reports, data, or questions.

The meeting announcement should include specifics on how the participants are to prepare for the meeting. It is good practice to inform participants whether they are to provide formal presentations, handouts, reports, generalized feedback, or specialized analysis related to the content of the meeting. If special guests are invited, a dress code, such as business casual, business attire, blue jeans, or uniform of the day might be suggested. It is crucial to give the participants the information that they need in order to be prepared. If participants must travel to attend, sending the notification out well in advance of the meeting to allow for budget and travel arrangements is necessary.

Only inviting people who will benefit from involvement or who possess information that will further the purpose of the meeting will prevent wasting the time of anyone not critical to the meeting. Listing the meeting participants and the reason for their inclusion in the meeting—as team member, subject matter expert, process owner, champion, facilitator, supplier, customer, etc.—will ensure that only the essential people are at the table. If others might benefit from the content, they can receive a distribution of the minutes after the meeting.

The decision about possible attendees depends on what needs to be accomplished during the meeting. Many meetings occur without the right people there. It is wise to ask several other people for their opinion instead of relying solely on one's own judgment about people to invite. Calling each person to tell them about the meeting, its overall purpose, and why their attendance is important is a positive gesture, if it is feasible. Following up the call with a meeting notice, including the purpose of the meeting, where it will be held and when, the list of participants and the person to contact if they have questions will generate a better response. Sending out a copy of the proposed agenda along with the meeting notice and having someone designated to record important actions, assignments, and due dates during the meeting will enable solid participation and follow through. The person designated to record important actions, assignments, and due dates should ensure that the information is distributed to all participants shortly after the meeting.

Starting the Meeting on Time

Starting the meeting when the agenda says it will start encourages good time management—often a challenge considering busy schedules. Starting on time will let the participants know that when they show up on time at the next meeting, their time will be well spent. Reviewing the purpose of the meeting and the agenda, including any adjustments that may have happened since the draft agenda was distributed, is the first order of business.

The process used in a meeting depends on the kind of meeting planned (e.g., staff meeting, planning meeting, problem solving meeting, etc.). However, certain basics are common to multiple types of meetings.

It is important to have a few ground rules for most meetings. These ground rules cultivate the basic ingredients needed for a successful meeting. Four powerful ground rules are: participate, focus, maintain momentum, and reach closure. A ground rule about confidentiality, depending on content sensitivity, is a good idea. Listing primary ground rules on the agenda and reviewing *each* ground rule for new attendees while keeping the ground rules posted at all times ensures that everyone participates according to the same guidelines.

Participants can provide input on priorities, agenda modifications, and additions. If members are calling in to the meeting, they need to be able to hear and participate adequately from their location. The scribe and timekeeper for the meeting need to be identified. A description of additional roles is included in Roles and Responsibilities for Launching Teams.

Using the agenda keeps the meeting on track; it can be referred to for timing and content coverage. The scribe or minute taker records all decisions, action items, and critical points of discussion. This information will become part of the history of the project or program. The meeting minutes are then used as a record for the team to reference in future activities.

Group discussion needs to be encouraged in order to surface all points of view. Decisions will be of higher quality and members will be more highly motivated with group discussion; they will feel that attending meetings is worth their while. Ideas, activities, and commitment to the organization improve when members see their impact on the decision-making process.

Conversation needs to remain focused on the topic. Only constructive and non-repetitive comments are productive. Tactfully ending discussions when they are getting nowhere or becoming destructive or unproductive ensures the quality of the meeting. Brainstorming and problem-solving techniques encourage participants to share ideas. Facilitating and Coaching Teams also contains excellent tips and techniques running effective meetings. Clarifying statements when necessary by repeating important comments such as "what I hear you saying is ..." gives the speaker a chance to verify a point or for others to share additional thoughts about the subject.

Ending the Meeting on Time

Not only is it important to start the meeting on time, but it is also important to end on time. Participants may be running from one appointment to another with little transition time. It is important only to run over the allotted time with the participants' permission.

The scribe/recorder should review any action items, deliverables and due dates, quickly restating any decisions made during the meeting. Consensus on the issues can be verified with a reminder to the participants that they are expected to support the outcomes of the meeting.

The next meeting date, time, and agenda should then be set. This preliminary information can be included at the bottom of the minutes so that participants can block out time on their future calendars. If the agenda cannot be finished, the remaining issues can be covered early in the agenda of the next meeting.

Leaving 5 to10 minutes at the end to evaluate the meeting is crucial. Each member should rank the meeting from 1 to 5, with 5 as the highest and have each member explain his or her ranking. The highest level manager in attendance should rank the meeting last.

Figure 2 is an example of a Lean Six Sigma Process Improvement meeting agenda template. This example includes the mission and vision of the Process Owner's department and allows the team members to reflect on the alignment of their activities to the strategic objectives of the organization most impacted by their activities. Minutes of the previous meeting are reviewed at the start of the session. Any actions, due dates, or deliverables are emphasized as a way to encourage accountability for project outcomes. Links to reference materials can be included in the electronic version of the agenda when it is sent out to participants before the meeting.

A copy of the agenda along with all supporting documentation, meeting minutes, and task lists should be archived in a common, accessible database for both team and organizational reference. Mr. Chris Giles, the project manager for the Seminole County Florida Community Services Lean Six Sigma improvement project, developed a flowchart to guide the documentation archive process for the Manager's Meeting redesign. Figure 3 shows the process that was piloted during spring 2010 in Sanford, Florida. Note that the archive process encompasses the pre- and post-meeting activities of creating the agenda, gathering data, scribing minutes during the meeting, capturing action items in a tracker, as well as storing the finalized documents in the standardized data base for retrieval and analysis.

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Agenda

(Time)   Mission and Vision Statement for Department or Process Owner Function
- *Include mission here as reminder to team and stakeholders of ultimate goal of their decision making.*

(Time)   Review minutes of previous meeting. Action items, due dates, barriers to completion.
- ID scribe and timekeeper
- Refer to *Roles and Responsibilities for Launching Teams*

Team Leader:
Meeting Facilitator:
Team Members and Other Attendees:
1.
2.
3.
4.
5.

Time:	Agenda Topics:	Person Providing Information:
	Topic 1:	
	Topic 2:	
	Topic 3:	
	Topic 4:	
	Topic 5:	
	Decision Summary	Insert link to document for reference
	Action Item Summary	Insert link to document for reference
	Review Parking Lot Items for Follow-up	Meeting Leader and Scribe; open discussion
	Identify Items for Next Agenda	Insert link to document for reference
	Evaluate Today's Meeting	Hand out evaluations and collect

Additional comments, special information:
Date for next meeting:
(Time)   Adjourn

Note: Prepare the agenda and send to all participants before the meeting, allowing everyone to prepare for the meeting.

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Figure 2: Agenda for Process Improvement Team Meeting

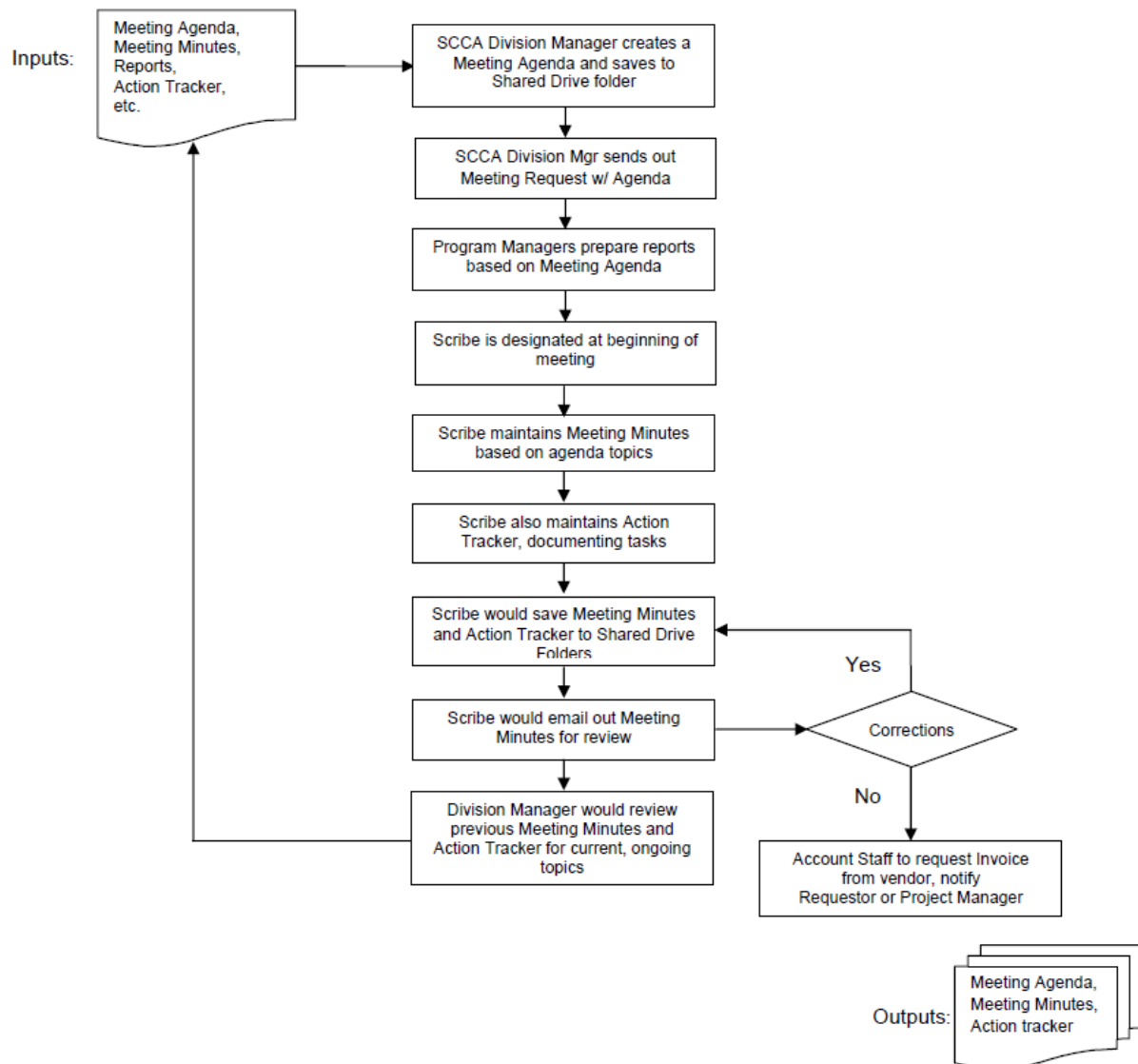**Meeting Documentation Archive Processing Flowchart**

Figure 3: Seminole County (Florida) Community Services Meeting Documentation Archiving

An example of meeting minutes is provided in Figure 4. This template was developed by the Seminole County Division of Community Assistance during a 2009–2010 Lean Six Sigma improvement project to increase the effectiveness of division management meetings. One of the authors served as a Master Black Belt trainer and advisor to the project. The template includes a "fill-in-the-blanks" format, which serves as a checklist for the scribe to include valuable information during the meeting. Feedback from the Lean Six Sigma pilot meetings using this template suggested that the attendees develop an outline of their operations status before the meeting.

QI Team Meeting Minutes
Date:_____
Project:_____

Invitees and Attendees

👍	Erica Farmer		David Feist
👍	Chris Giles	👍	Tim Willingham
👍	Jim Decker		Sarah Purcell
👍	Supreeth Rajan	👍	Shirley Davis-Boyce
👍	Ola Batarseh	👍	Grace Duffy
👍	Dr. Daniela Asparouhva	👍	Dr. Karla Moore
	Lisa Vance		Sara Wybo
👍	Clark Westerfield		Mike Kirchner

👍 = Attendee present at meeting

Agenda

- Scribe _____
- Meeting called to order: _____
- Meeting facilitator: _____

Minutes

- Review of action items: status, updates, due dates
- Topic #1
- Topic #2
- Etc.
-
- Next meeting will be _____ (time), _____(location), _____(topic, assignment)

Action Items

Owner	Item/Notes	Priority	Due
Sarah	Email handouts to everyone	M	03-31
Sarah	Follow up with Sponsor/Champion	H	03-31
Mike	Find out if we can set up a mailing list through Headquarters	M	04-22
Grace	Find out if a SharePoint site can be established through Headquarters	L	04-03
Daniella	Prepare stakeholders on a template to send out	M	04-22
Sarah	Schedule meeting with employees for trainer's presentation	H	04-03
Team	Read through section III of the training manual	H	04-25
Sarah	Send templates to team members	M	04-03
Data Teams	Send information to Sarah for dissemination	H	04-22
Sarah	Disseminate all information received	H	04-22
Sarah	Send SIPOC template to Ola and Majd	M	03-31
Leadership team	Prepare and send list of questions to Sarah for dissemination to team members	M	04-03
Team	Document short bio and list of strengths to send to Emad	M	04-22

Next Meeting
(Date and time), (Room)

Figure 4: Process Improvement Team Minutes Example

An electronic version of this outline is provided to the scribe, thus saving the scribe significant rework in typing up the minutes either during or after the meeting.

Figure 5 includes a table of action items coming out of the meeting. This interim documentation is entered into a formal action tracker for longer term project management. Figure 5 is a simpler meeting minutes template, useful for less complex improvement project meetings. This version

uses a summary table to encourage group discussion on how change might be verified, what successes and concerns were brought up in the meeting, plus additional comments. Even this rudimentary minutes template includes a column to identify the person responsible for follow-up on the item listed. Accountability should be a significant part of any organizational culture. Accountability is a positive control technique when employed effectively by leadership.

TEAM MEETING MINUTES TEMPLATE				
Meeting Name:				
Project:				
Date:				
Time:				
Participants:				
Items	**Notes**	**Action Items**	**Due Date**	**Person Responsible**
Tests of Change				
Successes				
Barriers/Concerns				
Other Comments				

Figure 5: Team Meeting Minutes Template

Tracking assignments from the meeting is a simple way to make sure that action items do not fall through the cracks. The first step is to capture the ideas as they occur during the meeting; thus, an action items section is included in the meeting minutes templates (Figures 4 and 5). Figure 6 shows a version of the Seminole County Community Assistance Department action tracker related to operations requirements for the Division of Community Services.

Not all events need an end-of-meeting evaluation. When the meeting is part of a pilot improvement or change activity, it is imperative to capture the "Voice of the Customer" on how the changes meshed into the continuing requirements of the process under study. Figure 7 is the evaluation developed for the Seminole County Community Services Manager's Meeting improvement and redesign project. The items included for feedback in this evaluation instrument are focused specifically on the impression that the participating managers had on the updates to the meeting agenda, location, timing, and alignment with operating requirements. The reader is encouraged to plan diligently to develop a feedback form that addresses the exact content of the meeting to be assessed.

The evaluation can be handed out at the end of the meeting and gathered immediately for analysis. If the desire is to have confidential feedback, then either a link to a survey online, a paper copy to be handed back later, or some other format may be more appropriate. Analyzing the data gathered about the meeting and creating a summary report with observations and recommendations for improvement then providing this report to those who provided the feedback are positive next steps. Following through with any action items coming out of the evaluation and respecting the participants by showing them that their comments have been heard and acted upon creates goodwill and sets the tone for productive meetings in the future.

Action Tracker worksheet: 12/01/09

Action	Recom. #	Unit	Responsible Individual	Start Date	Due Date	Measure
Process Maps of major CTQs	1	Each	Rick, Ed, Carmen, Leo, Shirley			Complete Approved
ID info and materials from outside Division	1		Shirley, Leo			
ID unit level projects, outcomes	1		Rick, Ed, Carmen, Leo	11/09/09	12/1/09	
Develop project status update process for pre-meeting prep	1	Division	Shirley			
Establish standard agenda items for mgr's meeting	2,4	Division	Shirley	4/09 in progress		
Build minutes template for mtg	1	Division	Draft: LSS team			
Develop standard corrective action worksheet	6	Division	Draft: LSS team			
Establish referrals log and tracking sheet	5	Division	IT/ Software overlap with Tech project			
QFD CTQs and interactivities between Units	1	Division	Draft: LSS team			Accurate overlaps, priorities weighted, update sched set
Identify training required for managers and staff to roll out improved meeting and follow up processes	3					List training items, who needs training, scheduled, completed, evaluated, effective. Process documented for future transition

Figure 6: Seminole County (Florida) Community Services Manager's Action Tracker

Summary

Holding effective team meetings is all about communication. It requires planning to anticipate the subject, organize content, tune the information to the intended audience, and prepare the proper supporting materials. Figure 8 is a generic meeting flowchart showing the responsibilities for planning and conducting an effective meeting. The Team Leader has most of the responsibility. The Sponsor and Process Owner also have a part in meeting success. Team members can provide information and energy for the meeting. Roles and Responsibilities for Launching Teams offers more guidance on using the skills of all team members in communicating effectively for healthy teams.

Meeting Agenda:

- How satisfied are you with the meeting agenda template?
  - Very satisfied
  - Satisfied
  - Moderate
  - Dissatisfied
  - Poor

Recommendations: _____

- Did you receive the meeting agenda in sufficient time to prepare before the meeting?
  - Yes
  - No

Recommendations: _____

Communication during the meeting:

- Do the previous meeting minutes adequately cover the topics discussed during that meeting?
  - Yes
  - No

Recommendations: _____

- How satisfied are you with the meeting minutes template?
  - Very satisfied
  - Satisfied
  - Moderate
  - Dissatisfied
  - Poor

Recommendations: _____

After the meeting:

- Are the tasks resulting from the team meeting clearly assigned in terms of job requirements and due date?
  - Yes
  - No

Recommendations: _____

- Are the tasks previously assigned discussed in next meeting after the assignment?
  - Yes
  - No

Recommendations: _____

- Do you have any additional opinions about the team meeting arrangements? If so, briefly explain.

_____

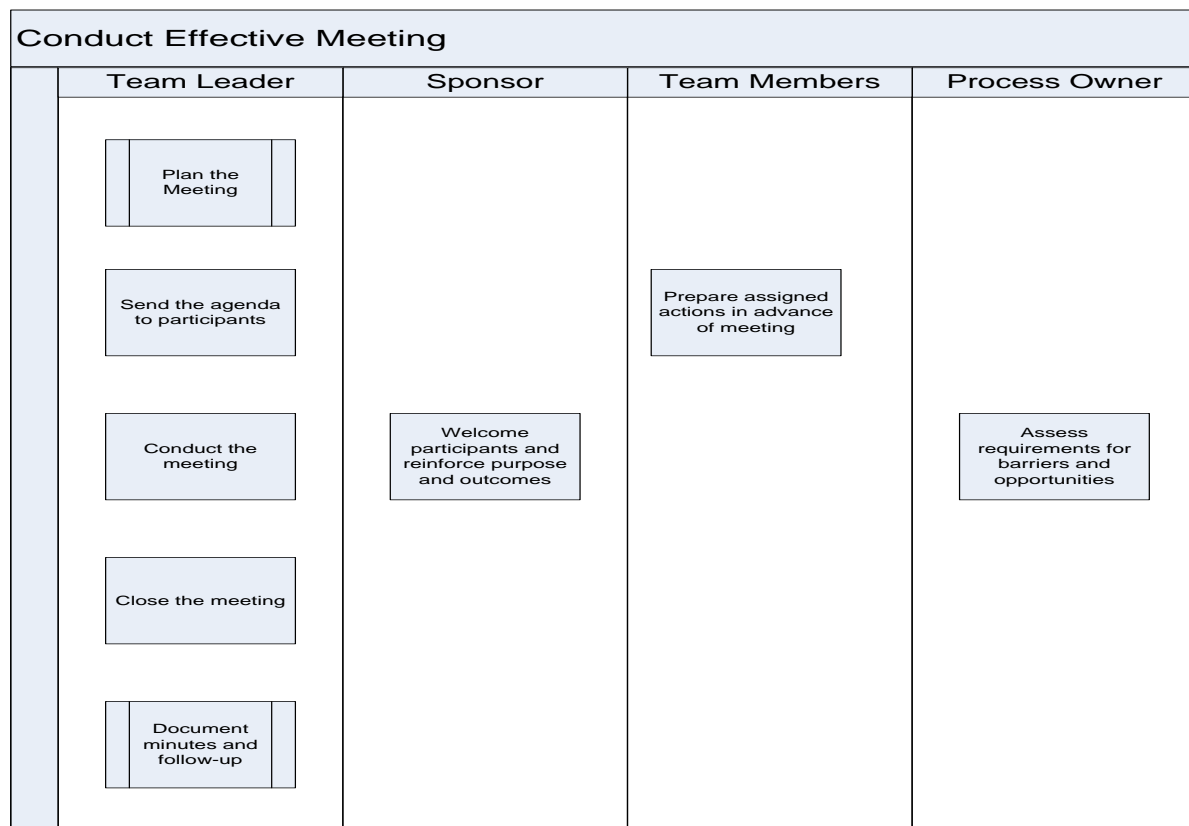**Figure 7: End-of-Meeting Evaluation for Pilot Improvement Project**

Figure 8: Deployment or "Swim-lane" Representation of the Meeting Process