



Notes on Effective Meetings and Conference Calls



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Excerpt from “The 50-Hour Workweek in 20-Hours”



CONDUCT AND ATTEND HIGH-QUALITY MEETINGS

THE REVEALING QUESTION

TRY THIS: Ask your team members the following question related to meetings and conference calls: *"Of all the meetings and conferences you attend, raise your hand if you believe they are all 100% valuable?"* **Spoiler:** No one will raise their hand. My polling revealed that approximately half of all meetings and conference calls attended by office-based workers are "mostly wasteful." According to the respondents polled, less than half of the meetings' content or the time spent in meetings was considered valuable; it was not a good use of their time.

In addition to the time wasted attending valueless meetings and calls, there is often pre-work to complete; this requires time to prepare, compounding the amount of unproductive time consumed. Also, after the meeting or call, people spend re-set or recovery time to get settled before engaging in their first post-meeting activity. The combination of the pre-, in-, and post-meeting activities means that meetings and calls take even more of our time than we realize. So, if half of a meeting's time is wasteful, then it is safe to assume that some of the meeting prep time is also a waste because, following the same logic, half of the prepared content will be of little to no value.

Organization leaders are becoming more aware of the potential inefficiencies inherent in most meetings and calls and are beginning to reevaluate them to determine how they can be improved. There are several reasons for this heightened awareness. The globalized marketplace—enabled by technology and the Internet—has expanded the reach of most firms, often requiring that workers in different regions of the world communicate to discuss multi-region deals and issues. As a result, workers "meet" more today (in person and using electronic communication vehicles such as video conferencing and phone conference calls) than at any point throughout history. The increase in the number of meetings has been driven, in part, by technological advancements—it is a lot easier and cheaper to have a "meeting" with my colleagues in Germany using video conferencing rather than flying there. This facility reveals another example of the paradox of technology: those advancements that offer the promise of saving time, effort, and cost, often contribute to our meeting inefficiency.



WHY MEETINGS ARE SO “BAD”

Many factors contribute to overly long, non-productive, non-impactful, frustrating meetings and audio & visual conference calls (hereafter collectively referred to as “meetings”). Researchers such as Peter Monge, Charles McSween, and JoAnne Wyer, who presented the findings of their study on meeting effectiveness in a report titled “A Profile of Meetings In Corporate America: Results of the 3M Meeting Effectiveness Study,” have provided great insight into the reasons why so many meetings are not productive. Their findings and those of other researchers appeared in the paper “Meeting Analysis: Findings from Research and Practice” by Nicholas Romano and Jay Nunamaker. Their reporting revealed the most bothersome issues that take place in meetings:

| Rank | Type of Problem |
|------|--|
| 1 | Getting off the subject or agenda |
| 2 | No goals or agenda set |
| 3 | Too lengthy |
| 4 | Poor or inadequate preparation |
| 5 | Inconclusive outcomes |
| 6 | Disorganized |
| 7 | Ineffective leadership/lack of meeting control |
| 8 | Irrelevance of topics discussed |
| 9 | Time wasted during meetings |
| 10 | Late starts |

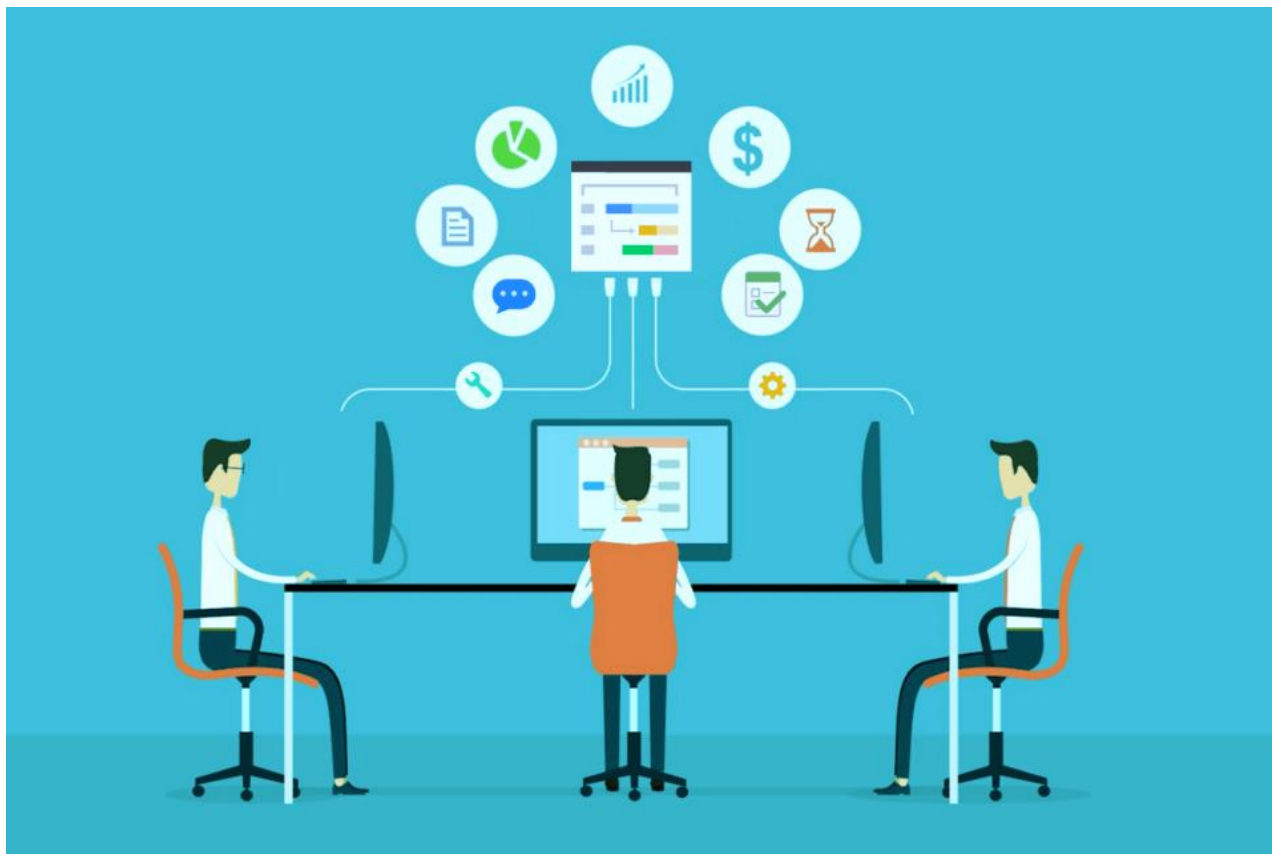


IMPROVING THE QUALITY AND EFFICIENCY OF MEETINGS

The challenges with meetings are well-documented. So the question is: How to improve the quality and effectiveness of meetings? To help you on the path to conducting and participating in more productive meetings, I am providing a collection of recommendations based on the best practices of leaders and managers who have implemented approaches that address the most common meeting problems. These best practices can be adopted ala carte or in any configuration preferred.

I have segmented the recommendations into five sections:

- Meeting Planning (for the Meeting Host)
- Meeting Logistics (for the Meeting Host)
- In-Meeting
- Pre- and Post-Session
- If All Else Fails



**PRE-SESSION****MEETING PLANNING (HOST)****Tidbits***

- 63% of meetings have no advanced written agenda.
- A typical manager spends 25% to 80% of their time in meetings.
- 1/3 of meeting participants are irrelevant to the meeting.
- Unproductive meeting time translates into a \$37 billion annual waste.

CONSIDERATIONS FOR IMPROVEMENT**Meeting Purpose**

- What is the purpose of this meeting (the desired outcome)? I am scheduling this meeting to achieve what specific outcome, goal, or objective?
- Define the purpose, goal, objective, or desired outcome for the meeting.
- Make this purpose clear to the participants.

Meeting Necessity

- Is this meeting *necessary*? Put differently, can I achieve the desired outcome for which the meeting is being considered without conducting this meeting? For instance, can I achieve the same outcome by speaking with someone individually or without speaking with anyone at all?
- If the meeting's necessity is even in the slightest doubt, reconsider having it.

Meeting Focus/Agenda

- What information to develop, what decisions to make, and what contributions will participants share during the meeting to achieve the desired outcome? These answers will become the meeting agenda.
- *Prioritize Topics into "Musts" and "Nice-to-Haves."* If there are five agenda items for the meeting, rank them in terms of importance. Next, determine which of the five items are critical to the meeting's success and, therefore, participants **MUST** discuss during the meeting (the "Musts"). Then, decide which agenda items are *not* critical (the "Nice-to-Haves"), and if there is meaningful value in covering those topics.

**PRE-SESSION****MEETING PLANNING (HOST)**

Note: You should strive to have no more than 60% of the agenda topics designated as Musts. This way, if the meeting goes long and all topics cannot be covered, at least the most important topics will be.

- Set a time limit to discuss each agenda item, and strictly enforce the time limit—even if it means using a timer to do so.
- Ask: How will I know that we have achieved the meeting? The answer will help refine the agenda items.

Meeting Attendees

- If there is value in hosting the meeting, then whom should attend (i.e., who will fulfill each meeting agenda item, contribute to the desired meeting outcome, or receive value from the meeting)?
- Who is *required* to attend this meeting to achieve the desired meeting objective?
- What is the value that each potential participant will contribute to achieving the desired outcome? Their value will become each participant's topic to prepare for the meeting.
- What value will each participant receive from attending this meeting? If each potential participant neither provides nor receives any clear value, then their attendance should be reconsidered.

**PRE-SESSION****MEETING LOGISTICS (HOST)****Tidbits**

- The average duration of a meeting is 90 minutes.
- Only 25% of meetings are scheduled 7 to 30 days in advance.
- After 1 hour, people lose mental focus and become ineffective.
- The average meeting includes nine people; only six of them participate.
- 47% of meeting time is spent discussing irrelevant issues (not related to the agenda).

CONSIDERATIONS FOR IMPROVEMENT**Duration**

- The duration should be adequate to cover all of the agenda topics.
- Trim 60- and 90-minute meetings to 45 minutes. If the agenda is purpose-focused and the participants know what to expect of them, you can eliminate the irrelevant discussion (~50% of the meeting time) and still get the critical work done.
- Use a timer (even an egg-timer) to keep the discussion progressing and the meeting on schedule. When the timer goes off, the meeting should end. This firm stand forces meeting discipline moving forward.
- After each 30-minute interval, schedule mental breaks.

Scheduling

- If it is not an emergency meeting, schedule the meeting far enough in advance (several days) to ensure that participants can make themselves available without having to sacrifice something else on their calendars.
- Offsite meetings comprise only between 2-10% of all meetings. However, participants say that offsite meetings are ten times more effective than on-site meetings.
- Pre-schedule "overflow" meeting time on the calendar in case the meeting runs long. Many meetings go beyond the allocated duration. In these cases, people rush at the end of the meeting to cram everything in, which leads to low quality and waste.



PRE-SESSION

MEETING PLANNING (HOST)

Invitees, Purpose, and Agenda

- Every meeting participant should have an ultimate purpose; “listening” and “observing” are not purposes.
- If decisions are to be made, include no more than a total of 5 people in the meeting. Any more than five people and the meeting typically becomes non-productive.
- Share the purpose/desired outcome of the meeting with participants ahead of time, ideally, in the invitation.
- Share the agenda in the meeting invitation and inform participants of their role in preparing for and leading their designated agenda topic(s).

Other

- **Conduct an occasional stand-up meeting.** Stand-up meetings are an option for ensuring that meetings are short and to the point. Think about it: the longer people have to stand during a meeting, the faster they will want to end the meeting.
- Every meeting lasting more than 30 minutes should include someone capturing the meeting minutes. Per Thomas Kayser: “A meeting is where you keep the minutes and throw away the hours.”

**PRE- AND POST-SESSION****FOR PARTICIPANTS****Tidbits**

- Most meetings give participants a 2-hour prior notification before they are asked to join a meeting.
- 100% of people say that not every meeting or call they attend is of value, which means that we all acknowledge we waste time in meetings and on calls.
- "A Meeting is indispensable when you don't want to get anything done." Thomas Kayser

CONSIDERATIONS FOR IMPROVEMENT**Make a Value Decision Whether to Attend**

- Review the agenda topics. If the meeting content is consistent with the most important things you need to accomplish, then it should be a valuable meeting worth attending.
- If the agenda topics and content are inconsistent with your most important objectives, then reconsider attending.
- If there is no agenda, request one. If none is forthcoming, then reconsider attending the meeting; it will likely be a waste of time.
- If you do not have a valuable role at the meeting (i.e., a role through which you will receive value or contribute value to the meeting purpose or desired outcome), then reconsider attending.
- Always consider sending a delegate if you cannot—or do not want to—attend a meeting yourself. If you do send a delegate, however, the delegate should be responsible for your contributions.

Post-Acceptance

- Define your desired outcome from participating in the meeting, given its agenda and purpose. What do you want to get from the meeting?
- Before the meeting date: Based on the meeting agenda, purpose, and *your* desired outcome from the meeting, document the things you would like to get from attending the meeting; this will serve as your agenda of "gets."



POST-SESSION

PARTICIPANTS

Post-Meeting

- Document any action items for which you are responsible. Note: If you document (e.g., write down) an action item that is in your memory, there is a 15% greater chance that you will complete it by getting it out of your memory.
- Decide which day you plan to start or complete your action item from the meeting. Note: If you choose a specific day on which you will complete an action item, there is a 20% greater chance that you will complete it.
- Add the action items to your calendar and allocate time to complete them. Research suggests **there is an exponentially higher chance of completing a task if scheduled on the calendar.**

IF ALL ELSE FAILS ...

CONSIDERATIONS FOR IMPROVEMENT

The Meeting Hardline

- Sometimes, firms elect to enact stricter meeting guidelines to stem the time workers lose during low-value meetings and conference calls. A **meeting hardline** describes the abrupt and absolute ending of a meeting when its duration has reached some drop-dead time; no if, and, or buts.
- Many years ago, I attended a meeting being conducted by a business leader who was known for being a strict, no-nonsense manager. At the start of the meeting, he said, "This meeting is scheduled to end at 2 PM, and we *will* end it at that time." So, 2 PM arrived, and people were still in the middle of a heated debate trying to resolve an important issue. The manager had a timer on his Casio digital watch (yes, it was that long ago) set for 2 PM. At precisely that time, his watch's alarm sounded, and the manager stood up, gathered his belongings, turned to the debating managers in the room, and said, "Enough! It's 2 PM, so this meeting is over. Period! Please grab your things and exit this conference room," and we did.



IF ALL ELSE FAILS ...

30-Minute Meetings Only!

- Some firms have instituted policies that the maximum meeting duration is 30 minutes long, and in some stricter cases, 15 minutes, and they use **egg timers** to keep the meetings on track. When the egg timer sounds, the meeting ends, period.
- Any meetings longer than 30 minutes must get managerial approval to be allowed.
- Short, fixed-length meetings have the effect of forcing meeting hosts and participants to ensure there is no fluff or waste built into the meeting and its agenda.

Meetings Held on Fridays Only!

- In some cases, meetings have become so overused and wasteful that firms have instituted policies whereby on-site meetings are only allowed on Fridays (or some other day of the week).
- Because of such policies, I have attended my fair share of meetings held in cafeterias, coffee shops, hallways, and outside of buildings.

4 PM Meetings Only

- Some firms have instituted policies where workers cannot hold any meetings until 4 PM. Why? Because no one wants to attend meetings after 4 PM—especially on Fridays. Such policies have demonstrated that long meetings are not always necessary and that fewer meetings are needed overall.

Avoid “Status” Meetings

- Status meetings—where people give an update or the status of something—are usually only valuable for the one or two people who need to know the information; for everyone else in the meeting, it is a waste of time.

**IN-SESSION****PARTICIPANTS****CONSIDERATIONS FOR IMPROVEMENT**

- **Ban electronics.** Institute a no-laptop, no-cell phone rule. Laptop computers and mobile phones take participants’ focus and attention away from meetings. For participants who use their laptops or phones to take notes in the meeting (excluding the keeper of the meeting minutes), remind them that their recall of the meeting’s content and the concepts discussed will be higher if recalled from *hand-written* notes as opposed to their PC.
- **Enforce topical discussions only.** Two of the main reasons why meetings last too long are: (1) people come to meetings with their personal agendas, and (2) sidebar discussions unrelated to the agenda, including jokes and side comments. When meetings prolong due to these off-topic discussions, the agenda does not get fully covered, and participants get frustrated with the inefficiency. So, when the discussion veers off-topic and is unrelated to the agenda, capture the items, and arrange for them to be resolved individually or at a later meeting date.
- **Designate an omnipotent moderator.** Related to enforcing topical discussions, designating an omnipotent moderator will put someone in charge of making sure discussions do not veer off-topic. Part of being designated as *omnipotent* is that all participants will understand and adhere to the rule that if the Omnipotent Moderator ends an off-topic discussion, the discussion must be ended and tabled, regardless of who is engaged in that discussion. The moderator should also be responsible for monitoring the meeting timer. When the timer signals the end of the meeting, the moderator should abruptly end the meeting and usher everyone out—even if the agenda topics were not all discussed. While this may sound harsh, it is a useful tool for building discipline in participants to adhere to future agendas and not waste time.
- **Institute the Lockout.** Do you have a problem with people showing up late for your meetings? Try instituting meeting lockouts. If the meeting is supposed to start at 10 AM sharp, when the clock strikes 10, lock the doors and do not, under any circumstances, allow the latecomers to join the meeting. The lockout not only disciplines the latecomers but also demonstrates to the participants who showed up on time that *they* should not be late for the next meeting. It works.



***Tidbits:** N. C. Romano and J. F. Nunamaker, "Meeting analysis: findings from research and practice," *Proceedings of the 34th Annual Hawaii International Conference on System Sciences*, Maui, HI, USA, 2001, pp. 13 pp.-. doi: 10.1109/HICSS.2001.926253