~~10~~ 12 TOOLS FOR BETTER MEETINGS

team awesome

DEATH BY MEETINGS?
WHAT IF THEY COULD BE WILDLY EFFECTIVE?

I don't hate meetings. On the contrary, I love a well-designed, effectual meeting. It's the ineffective meetings that really grind my gears.

The effectiveness of meetings can go south for a lot of different reasons. Chances are your ineffective meetings are victim to several key detractors I mention in this guide. And the good news is it is completely fixable.

This guide holds ten, no, twelve (!) tools you can use to build better meetings. Each one can get you a little closer to meetings that feel incredibly effective and useful.

Above all, meetings and teams are only truly successful when they are built on a foundation of **trust** and **psychological safety**, meaning the group believes that it is a safe place for interpersonal risk-taking.

Stop wasting the valuable in-person time you have with your team and use it to the fullest potential! You will be so glad you did (and your team will be too).

Sending love, understanding and belonging,

Chief Awesome Officer
Team Awesome

1 SET A GROUP AGREEMENT

Begin any new group by taking time early on to set a **Group Agreement**. This is when the group collectively decides what kind of atmosphere they want, what will help the group thrive, and how to handle conflict. The group lives into the collective agreement and revisits it often.

Here are some questions you might pose to the group, for everyone to contribute their answers:
- What type of **atmosphere** do we want to co-create?
- What will help you **thrive**?
- How do we want to be when things get **challenging**?
- What do you expect from me as your **leader**?

A few key tips:
- Make sure everyone is heard by inviting safe participation from everyone
- Seek confirmation from everyone that this is the agreement they are willing to live out
- Encourage everyone to maintain these rules with each other – the leader is not the only person responsible for ensuring the agreement is followed
- Bring out a copy of the Group Agreement regularly, and confirm that the group still commits to it

When do you do this?
It is great to do it at the forming of any new group, but it can be done anytime as a way to reset the group expectations and rules of engagement. It can be useful for a period of time as short as a one-time workshop or for an ongoing group relationship. Remember, every time someone new enters the group or someone leaves, the dynamic of the group can (and usually does) change. The agreement should be revisited and recommitted at every change in the group because culturally, this is the beginning of a new group!

Type of atmosphere we want
- Safe and supportive
- Everyone participates, and allows space for others
- Fun!
- Push each other to grow

What would help the group thrive
- Confidentiality, said here/stays here
- Staying on time, respectful of peoples' time
- Share stories, examples, what's worked

How to show up when things are hard
- Stay curious, ask questions to learn more about someone's point
- Assume positive intent
- Willing to respectfully challenge each other

Expectations of leader
- Keep us moving, avoiding rabbit holes
- Agendas to prepare for meetings
- Transparent communication

2 INTENTIONALLY BUILD SAFETY

Dr. Amy Edmonson from Harvard Business School has researched and coined the term **Psychological Safety**. She defines it as a shared belief that the team is safe for interpersonal risk taking.

There are some clear behaviors that create safety.

First, teams demonstrate **candor**. They show that productive disagreement is encouraged, and model how to do it. Second, leaders see themselves as part of the group and **actively participate** in creating safety and transparency. Finally, team members have high enough **self-management** to respond thoughtfully rather than react.

I'm sure many of you have been in a meeting before where someone expresses an idea freely, and another person BLURTS out a reaction instead of thoughtfully responding. The person who shared the idea quickly learns "well, that's not safe here," but so does everyone else who witnessed it.

When people don't feel safe, what does it look like?

People are silent when they should speak up. Employees don't believe that their contributions matter.

Often in environments of stress or uncertainty (such as mergers, for example), people revert to covering their "assets," or protecting their turf. It reminds me of the sinking scene of the Titanic. All of the sudden the safety you thought you had feels tenuous. The people who you believed had your back appear to now be concerned with saving themselves.

You can build safety by:

- Setting group agreements and honoring them
- Making sure everyone has space to speak and share ideas
- Regularly asking for feedback, and responding well to it (e.g., taking action, non-defensive)
- Using the "three and me approach" as a group (each member who spoke waits for three other people to contribute before they do so again)
- Creating transparency by including others in information-sharing and decision-making
- Using people's names appropriately
- Building personal connections between team members

3 SET (AND KEEP TO) AN AGENDA

I know, it takes work. And planning ahead.

A quality agenda also minimizes a lot of wasted time, helps people know what to prepare, and helps meetings suck less.

A well-crafted agenda can help in the following ways:
- Team members who don't like being put on the spot to brainstorm ideas or have memorized facts and figures (especially Introverts!) appreciate that they can **prepare thoughts in advance** and have a chance to look like they know their business.
- Agendas reduce **uncertainty**, which is a total culture killer.
- You can include all of the parts you tend to forget, like r**ecognizing peoples' accomplishments** or personal updates.
- Agendas can create a **system** for your meetings, which allows you to delegate leadership opportunities.
- Agendas can help you **stick to timelines** and avoid rabbit hole discussions or meetings running double in length.

The content of a quality agenda might include:
- Opportunities for recognition of great work, personal updates, and space for members to express how they are feeling are ways to honor people's humanity each meeting
- Maximized time for decision-making and collaboration, and minimized time for "updates"
- Clear requests for what team members should come prepared with to the meeting
- A diligent log of what tasks came from the meeting, who is handling each task, and the timeframe for each

Bonus!

Look for agenda templates & planning tools for crushing your agenda planning at the end of this guide.

4 MAXIMIZE IDEA GENERATION & DECISION MAKING, MINIMIZE UPDATES

Picture this. Every week your team meets to basically update you, the leader, on their updates.

The rest of the group sits and daydreams for the remaining 50 minutes of the meeting they aren't giving their update. No problems are solved, nothing is accomplished. It's just an in-person download of updates for the benefit of the leader.

I cannot begin to tell you how many meetings I have been in like this. I am not proud to say I have led some of them. Not my best moments.

Find a more efficient way to get your project updates, especially considering they don't always need to come in a group setting. There are plenty of ways to do this, so find what works for you. Two ways I have seen be most successful? Teams updating a group Google Doc with their key updates, or the leader getting updates through regularly scheduled one-on-one time with direct reports.

That in-person time is GOLD. Use it to the maximum capacity! Do the things that you can only do with all of the right brains in the room, which are **collaboration** and **decision-making**.

Yes, you may brainstorm. But use your previously distributed **agenda** to make sure people come to the table with thoughts prepared rather than trying to brainstorm cold in the meeting. Everything on the agenda should focus on accomplishing the things that can only be done with everyone in the room. It means people **working together, interaction, and coming to consensus.**

Instead of this...	Try this...
Updates	Collaborate on problems and decisions
Going on too long with idea generation	Make decisions & assign "To Do" items before adjourning the meeting
Springing brainstorming topics on people	Tell people in advance to come prepared with ideas on a topic

5 USE IN PERSON TIME TO CONNECT PEOPLE TOGETHER

Intentionally connecting people together to **strengthen personal ties** within the organization is a key behavior in creating a sense of belonging for a team member with their work and organization (Deloitte, 2020).

Here is an example of how this works.

I once worked with a team that operated entirely in "row silos" – literally, even within the same department. If they worked one cubicle row over, people did not know who each other were or what they did. One of the most transformative things we changed was to **use in-person time to connect with each other** and educate each other on their roles. Suddenly, conversations turned from, "Why didn't they work with me on that project? That affects my work!" to "I should talk to Emily about that, we have some overlap in goals."

Team members can feel a higher sense of belonging when there is some **commonality or shared experiences** between members and when they can have a sense of commitment to the group.

For example, you have a group that is completing leadership training. All the group members have the main commonality of a leadership role. But a team member could also find even **deeper connection** by linking with others in the group who are also working moms, who are also running complex or unique departments, or who are also Latinx.

6 DEMOCRATIZE LEADING & PREPARING FOR MEETINGS

If a meeting is useless without the leader who called for it, the meetings are wasted time.

Meetings should be defined to benefit the group, not solely the leader.

As we talked about earlier in this guide, having preparation and a thoughtful agenda in place takes some work prior to simply showing up the meeting. It is important that you share this responsibility with other group members **so they learn how to run effective meetings** as well. They may even find ways to improve upon the foundation you built!

In the beginning, leaders of the group can do some of the preparation and design of the meeting to **set an example of the expectations**. It helps to be explicit with people that everyone will have a chance to lead the meeting, and why well-prepared meetings are important to you and the success of the group. It gives team members a heads up that they should be:

- Paying attention to the inputs of the meeting
- Searching for ways to continuously improve the group's in-person time
- Putting just as much care and preparation when it is their turn to lead the meeting

The more fully you prepare and teach others to do this leadership task well, the better they will deliver on it.

Democratizing the preparation and leadership of the meetings means that every group member learns how and is expected to lead meetings, and well prepare for them. It releases tasks and responsibility solely falling on the leader, and it gives the opportunity to everyone on the team to learn valuable skills and practice new leadership skills in a safe environment. **Developing your team's leadership skills** is one of the most important jobs on your plate that you can't delegate.

As everyone is trained and expected to run a quality meeting when it rotates to their turn, the meeting can exist productively **even without the leader**. The team knows what to do, what needs to be done. No one sits and stares at each other wondering why no one canceled the meeting if the boss wasn't going to be there. It gives people **autonomy**, a sense of **agency** with decision making and denotes **trust** within the team.

7 TRACK CLEAR DELIVERABLES & OWNERS

If I had a nickel for every time I left a meeting with **no clear understanding** of who was committing to doing what by when, I would have, well, a whole lot of nickels.

We spend all this time deliberating and then fail to be direct and clear enough to articulate the deliverables, make sure everyone knows who is assigned to them, and by when. Without this clarity, team members tend to assume someone else has the ball, no one does anything and the next meeting is like a déjà vu repeat of the previous one. It is a truly maddening cycle.

Having a place to **track it on the agenda-turned-meeting-notes** is a great place to remember to track commitments. Having a **designated person**, such as the one leading the meeting, to track commitments before the meeting ends is also key.

As the leader, consider what your **system** will be for following up on the timely completion of those commitments. Either someone is responsible to do so, or you track them for yourself within your own self-management system (e.g., your calendar, planner, or notes for each 1:1 conversation with team members). Dates and commitments don't mean anything unless there is a shared understanding that the **expectation will be upheld**.

The more deliverables and commitments are followed up on or held to deadlines, the better the commitment and completion from the team.

Example:

Action items and commitment dates (and action owner):

ACTION ITEM_____BY WHEN_____ACTION OWNER_____

-
-
-

8 ENSURE EVERYONE FEELS SEEN & HEARD

Ensure everyone feels seen and heard.
(Otherwise, did they even need to be there?!)

Look, some of these tools may feel really mundane or even elementary. And yet…yet! There are a million distractions that pull us away from connecting with people. Well-meaning leaders who *think* they are seeing and hearing people miss opportunities all the time. The key is to **make intentional connection one of your main goals**. Sometimes I have had full meetings with people when the content was secondary and the main goal was simply to connect, build relationship with someone, and make sure I did my best to help them feel safe and welcome. The "stuff" we covered didn't matter as much compared to the connection.

Here are some easy ways to intentionally include everyone during your meetings:

1   When you enter the meeting, make **eye contact** and **connection** or greeting with every person. Use peoples' names, and pronounce them correctly. This acknowledges their presence.

2   **Invite safe participation** from everyone. Hopefully, you have done your foundational work of knowing your team and how they best function in a group meeting setting. If you haven't heard input from some members, safely invite them to share their opinions.

3   Create a space where **candor is welcome**. The group is encouraged to productively disagree with each other and they model how to do it. Show with your actions that there is no recourse for disagreeing or sharing different ideas. [The groundwork for how to do this can be covered in the Group Agreement]

4   Many groups have more vocal members who tend to dominate the conversations, and more quiet ones who speak when it is important for them. Try to **manage the space** so that there is space available for the quiet members to fill with their ideas.

5   **Genuinely thank team members** for the ideas and input shared during the meeting.

9 CONSIDER MEETING TIMING & CADENCE

Be thoughtful about meeting timing and cadence by finding the ideal answers to these questions:

- When do you have meetings?
- For how long?
- How often?
- Where do you have them?

Being **thoughtful and inclusive about time** means that your team members aren't supposed to be in two places at once. Having a time that works for peoples' personal lives is critical to eliminating distractions and allows people to feel more present, more ready to participate.

When deciding on meeting length and cadence, the sweet spot will vary widely by team. Generally, we waste a lot of time in meetings. If your **preparation** is spot on, then meetings should be successful on the shorter side. Be careful not to trim meetings back to the bare minimum – this usually results in speed round "updates" instead of decision making or collaboration, and you will have completely wasted the in-person team **opportunity to create personal ties and connection** between people. What I am saying is, don't you dare cut out parts like eye contact, recognition, or personal check-ins for the sake of efficiency.

Be sure to plan meetings either virtually or in a **space that appropriately matches the discussion** items. In order for people to discuss confidential or sensitive issues, they need to feel safe and able to speak freely. Avoid over-meeting the needs of the group (i.e., Zoom meetings when cameras are totally unnecessary and draining).

Discuss these details with your group. What's working? What isn't? **Asking the group for input** will optimize the system you are building to support quality, consistent team meetings.

Quick! Do a self-assessment...

What's working well with your meetings?

What might work better?

How will you get input from your team about optimizing your meetings?

10 DO A SELF-CHECK

Here is a whole **17-point engine check** for you to take a hard look at your meeting process. Be honest and force yourself to look critically at potential top priority action items.

Answer yes or no if you know those answers to be true. Answer "I don't know" if you can't say definitively. These will be key areas to **observe more closely** or **ask for feedback** from group members to see where you actually fall.

- Do all members feel **safe** to share their ideas?

- Is **productive disagreement** modeled in the group meetings?

- Are people **ready** to contribute?

- Does the **leader** see themselves as part of the group, with an active role?

- Is the meeting built in service of the **group success**, rather than for the leader?

- Do your meetings advance the work forward in **decision-making** or **collaboration**?

- Are team members comfortable to bring their **whole selves** to the group? If not, what part isn't welcome?

- Do team members believe the group is a **safe space**?

- Are **agendas** thoughtfully created, and distributed with ample time in advance?

- Can team members **trust** the agendas to be followed?

- Do all team members know the **expectations** of how to prepare for the meeting?

- Do meetings begin and end **on time**?

- Are clear **deliverables/owners/timelines** set for "To Do" items before the meeting ends?

- Are people **completing** their assigned deliverables from the meetings?

- Is the meeting effective/useful even if the main leader is **not present**?

- Do you have some type of clear **group agreement** in place?

- Could this meeting have been an **email**?

11 + 12 BONUS!

Next you will find two bonus resources that you can use over and over again to teach good meeting preparation habits and to run effective meetings.

Enjoy the **Meeting Prep Worksheet** and **Sample Meeting Agenda**!

Meeting Prep Worksheet

This is a great exercise for anyone getting used to a new way of preparing for meetings. It's not just for you as the leader, but for anyone else on the team who rotates into the role of managing and preparing the meeting! You can use this for your own benefit, as well as a teaching tool for others on your team.

The prep worksheet is your own working document and is not necessarily meant to be shared (the agenda translates into the shared form!). Use it as a way to work out your own thoughts so they are fully formed when the agenda is made.

As you gain experience, much of this prep work will become second nature to you. In the beginning, go slow, take your time to be thorough while you try a new method. It will save time in the long run.

Meeting Agenda Template

Use the agenda as a way to prepare for the meeting, and send it out in advance to meeting participants so they know what to expect, what to prepare, and who's doing what.

A blank form and a completed example are included in this guide as well.

Find an extra Word version to edit to your own needs here!

MEETING PREP WORKSHEET

Before:

Meeting Leader:
Participants come prepared with:

Top priorities of meeting (no more than 2-3):

Everyone feels seen/heard	Idea generation
Key decisions made	Build group safety & trust
Collaboration	Other:

How will you ensure these are accomplished?
1
2
3

What is the best way to communicate meeting expectations so everyone is prepared?

During:

- Follow the agenda
- Execute key priorities for meeting
- Create a safe and open space where everyone can show up as their whole selves

After:

What went well in the meeting?

What missed the mark?

What leadership skills could you adjust next time to be even more effective?

How does the team feel following that meeting?

What coaching or recognition do you need to do for your team following that meeting?

What items need to go on your calendar for follow-up? [Put them there now]

MEETING PREP (EXAMPLE)

Before:

Meeting Leader: *Susan*

Participants come prepared with:
3 ideas to pitch to the new client, someone on the team they want to recognize

Top priorities of meeting (no more than 2-3):

Everyone feels seen/heard   (Idea generation)

Key decisions made   (Build group safety & trust)

Collaboration   Other:

How will you ensure these are accomplished?

1 *Revisit the group agreement so everyone recommits to it*
2 *Begin the meeting with recognition - peer-to-peer*
3 *Complete brainstorming session with ideas pre-prompted*

What is the best way to communicate meeting expectations so everyone is prepared?

Send out agenda in advance; make sure participants know what to be ready to present

During:

- Follow the agenda
- Execute key priorities for meeting
- Create a safe and open space where everyone can show up as their whole selves

After:

What went well in the meeting?
Everyone did a nice job brainstorming quality ideas

What missed the mark?
It was our first recognition around the room, need to provide a clearer example of what that looks like

What leadership skills could you adjust next time to be even more effective?
More clear examples of recognition to the team; set firmer boundaries on time for brainstorming to stay on time

How does the team feel following that meeting?
Spoke with two team members - loved the structure of the agenda, better time-keeping needed

What coaching or recognition do you need to do for your team following that meeting?
David was not prepared to contribute - ask questions and set expectations in next week's 1:1 meeting

What items need to go on your calendar for follow-up? [Put them there now]

David conversation, check in with Talia on finalized client pitch by Friday, plan my next meeting recognition

MEETING AGENDA

Team:
Meeting Leader:
Date/Time:
Participants come prepared with:

Key Goals of Meeting Today:
-
-
-

Agenda:

- Recognition/Personal check-ins
- Check-in on commitments from last meeting

Today's business/top three priorities:

Priority 1:   **Presenter:**   **Time Allotted:**

Priority 2:   **Presenter:**   **Time Allotted:**

Priority 3:   **Presenter:**   **Time Allotted:**

Notes:

Takeaways:

ACTION ITEM_____BY WHEN_____ACTION OWNER_____
-
-
-
-

MEETING AGENDA (EXAMPLE)

Team: *Marketing team*
Meeting Leader: *Advika*
Date/Time: *Thursday, 5/5/22; 1:00 p.m. - 2:00 p.m.*
Participants come prepared with:
3 ideas to pitch to the new client, someone on the team they want to recognize

Key Goals of Meeting Today:
- *Recognize all of the hard work and successes the team and team members have had this month!*
- *Generate new ideas to pitch to the new client [XYZ, inc.] and narrow down to draft portfolio*
-

Agenda:

- Recognition/Personal check-ins *Also revisit the Group Agreement we drafted last meeting (5 min)*
- Check-in on commitments from last meeting *(5 min)*

Today's business/top three priorities:

Priority 1: *Appreciation*   **Presenter:** *Zaryaa*   **Time Allotted:** *15 min*

> *Celebrate the team and individual contributions that lead to our successes this last month. Everyone has a chance to speak, and everyone has a chance to be recognized.*

Priority 2: *New Client Pitch Portfolio*   **Presenter:** *Tanner*   **Time Allotted:** *20 min*

> *Everyone brings three ideas to pitch, group narrows down to a draft portfolio with a balanced approach to offerings..*

Priority 3:   **Presenter:**   **Time Allotted:**

>

Notes:
Identity rebrand, color palette, value proposition, IG strategy, targeted ad strategy, photography offering

Takeaways:

ACTION ITEM	BY WHEN	ACTION OWNER
Create a recognition slack thread	*5/13/22*	*Amber*
Draft new pitch portfolio for XYZ, inc.	*5/15/22*	*Tanner*
Send new photography offering details to the group	*5/7/22*	*Ariana*

LOOKING FOR MORE RESOURCES?

The Definitive 1:1 Conversation Guide for Leaders | Katie Rasoul

The Feedback Handbook | Katie Rasoul

Belonging Resource Guide | Team Awesome by Katie Rasoul

10 Ways to Manage Your Energy | Team Awesome by Katie Rasoul

FOLLOW KATIE'S WORK!

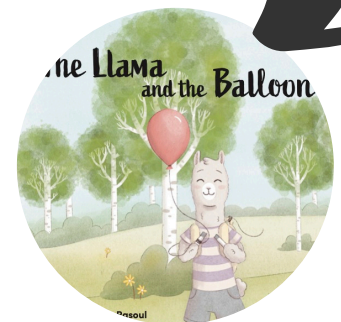Leadership coach. Keynote speaker. Creator.

www.katierasoul.com

The Llama and the Balloon

Hidden Brilliance: A High-Achieving Introvert's Guide to Self-Discovery, Leadership and Playing Big