10

EFFECTIVE AGENDAS: DESIGN PRINCIPLES

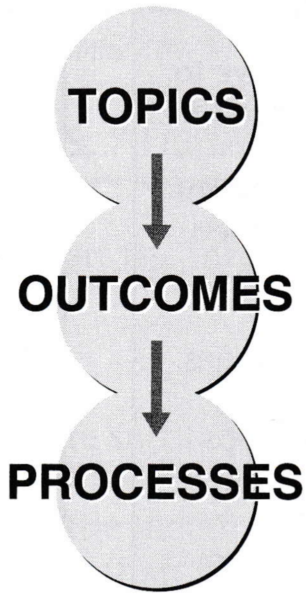
FRAMEWORK FOR DEFINING, SEQUENCING AND COMMUNICATING THE GAME PLAN

- **Building Blocks of an Effective Agenda**
- **From Building Blocks to Logic Model**
- **From Sections to Sequence**
- **Six Agenda Templates**
- **Communicating the Game Plan**
- **Agenda Planning Roles**
- **Involving Participants in Agenda Design**
- **Design Principles: Summary and Integration**

SURE-FIRE METHODS FOR CREATING A PATHETIC AGENDA

- [ ] 1. Time the agenda right down to the minute, and assume the meeting will start exactly on time.
- [ ] 2. Assume that everybody will know what you're trying to accomplish at the meeting – if they don't, they'll ask.
- [ ] 3. Plan to spend the first half of the meeting prioritizing what to do in the second half of the meeting.
- [ ] 4. Keep the meeting interesting by making sure the people who give reports use overheads and pie charts.
- [ ] 5. If you've got an agenda of difficult and important items, improve efficiency by skipping breaks and shortening lunch.
- [ ] 6. When the most important discussion is likely to be emotionally charged, save it for last. Maybe the group will be more ready to deal with it by then.
- [ ] 7. Since everyone prefers their meetings to stay on track, assume that no one will raise a topic that's not on the agenda.
- [ ] 8. When you know the agenda is too packed, assume the meeting will run overtime. But don't tell anyone in advance. People sometimes do their best thinking under pressure.
- [ ] 9. To maintain your flexibility, don't put the agenda in writing.
- [ ] 10. Don't waste time planning an agenda. Things never go the way you expect them to.

BUILDING BLOCKS OF AN EFFECTIVE AGENDA



The work of a meeting consists of three components: the topics to be discussed, the desired outcomes for each topic, and the processes needed to achieve the desired outcomes. These three components can be thought of as the *building blocks* of meeting planning.

Each *topic* to be discussed can be viewed as a segment of the meeting. For example, if the group were going to discuss three topics – a marketing issue, a staffing issue, and a budget issue – each topic would be discussed separately and should thus be treated as a distinct segment.

The *desired outcome* of each topic can be viewed as the goal for that segment of the meeting. For example, the desired outcome of discussing the marketing issue might be a plan for developing a new website.

The *process* refers to the activity (or set of activities) the group will do to achieve the desired outcome. Such activities include brainstorming, categorizing, debating, and many more.

FROM BUILDING BLOCKS TO LOGIC MODEL

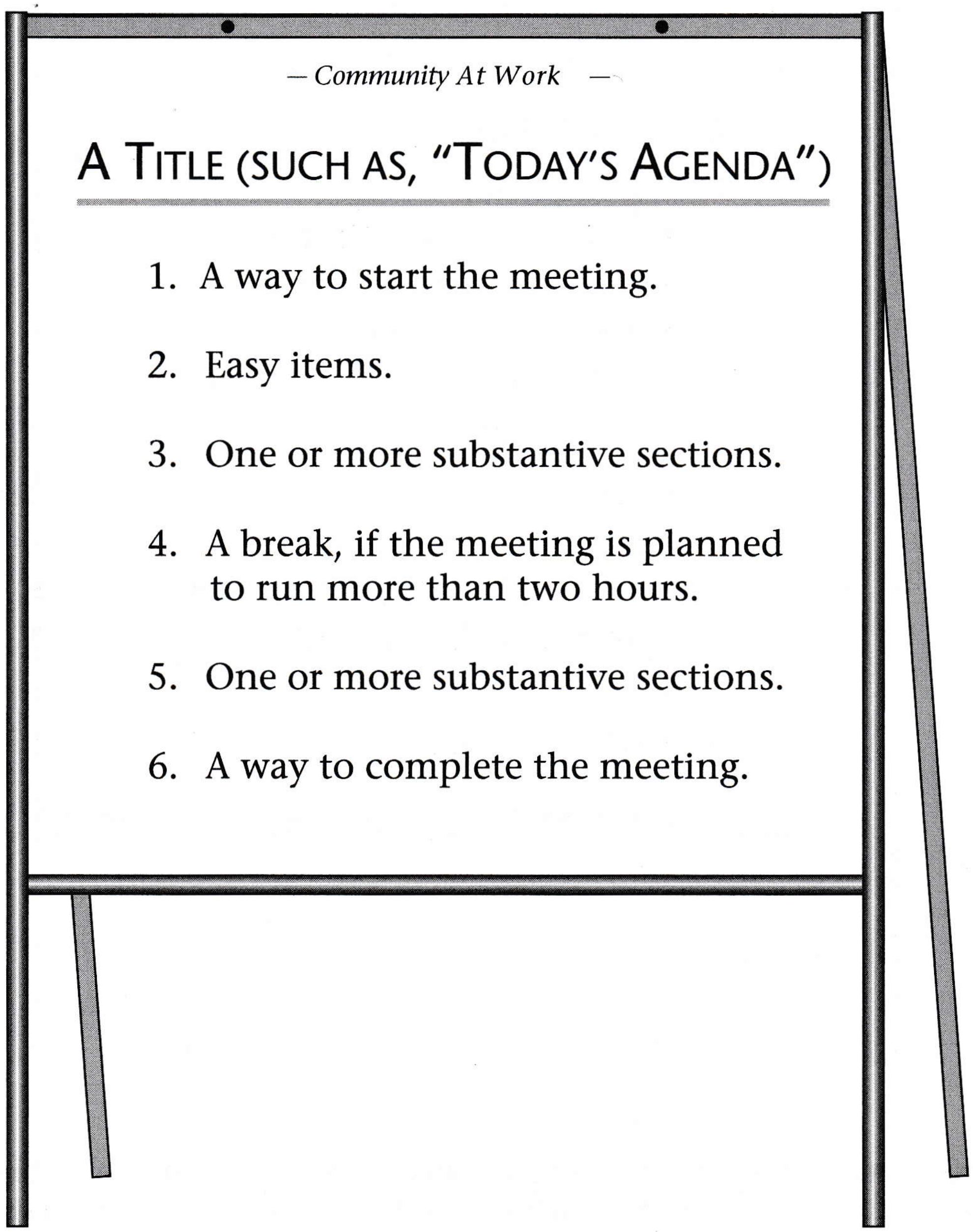
	SECTION 1	SECTION 2
TOPICS	Planning the move to our new headquarters.	Recruiting & hiring the receptionist.
OUTCOMES	Stages and important steps are established.	• Job description OK'd. • A lead recruiter has been assigned.
PROCESS	1. Brainstorm stages. 2. Prioritize. 3. Breakout groups to define steps. 4. Gallery tour. 5. Open discussion. 6. Decisions.	1. Review last year's documents. 2. Suggest changes. 3. Decide. 4. Ask for volunteer to do recruiting.
	2 HOURS	10-15 MINUTES

One of the core tasks of an agenda planner is to turn the three building blocks of each section of a meeting into a *logic model* for that section. Thinking this through proceeds along the following lines:

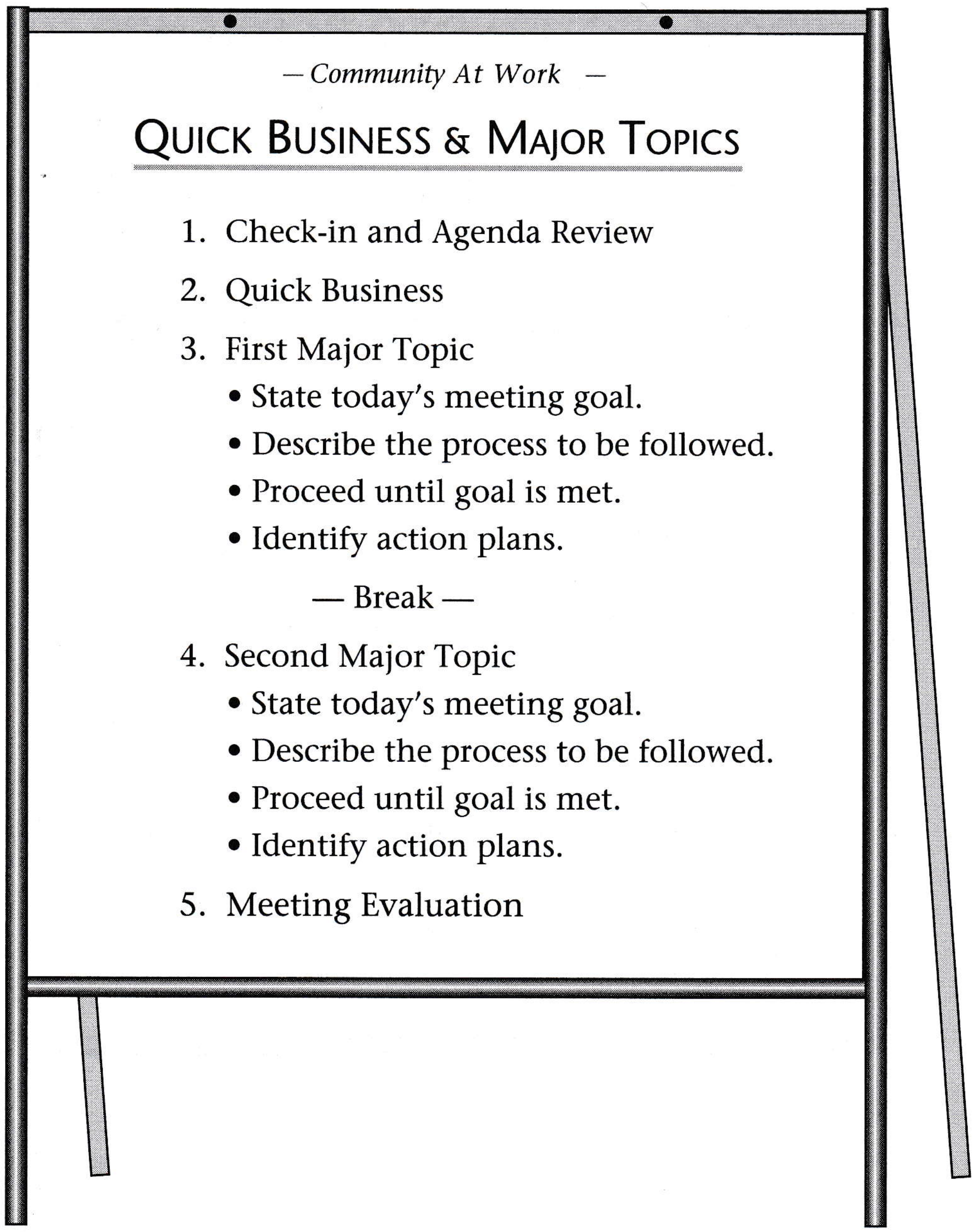
1. *Topics:* What topics do we want to address?
2. *Outcomes:* What are our desired outcomes for each of those topics?
3. *Process:* What activity (or set of activities) will best support the group to achieve each desired outcome – and how much time should be estimated for each activity?

These steps in building a logic model are challenging to do well, yet they can make the critical difference between a productive meeting and a useless one. (Chapter 11 provides concepts and tools for defining outcomes. Chapter 12 does the same for process design.)

FROM SECTIONS TO SEQUENCE

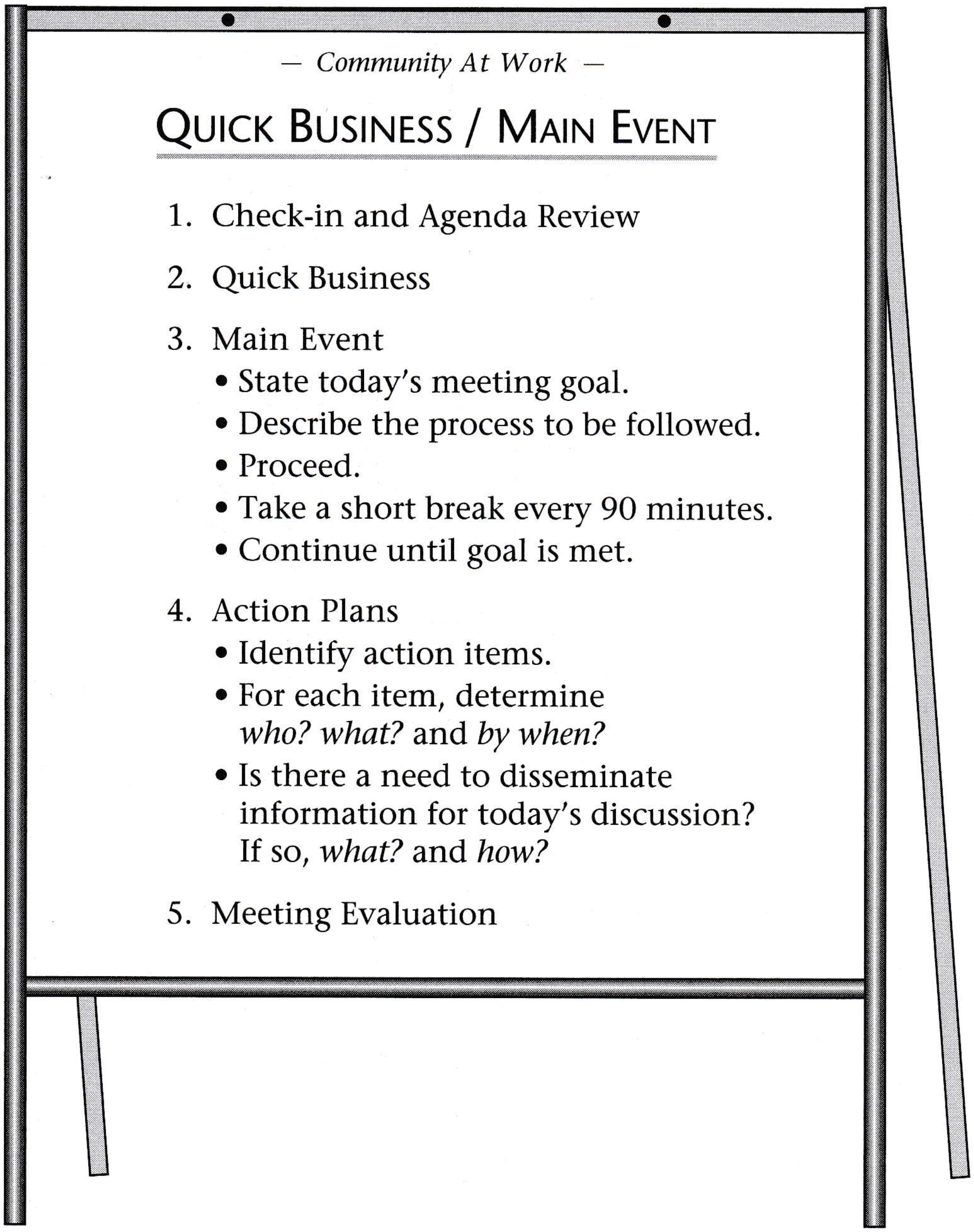


After the meeting designer has built the logic model for each section of the meeting, the next step is to organize the sections into a sequence. The picture above shows a generic approach. The following pages offer six more.



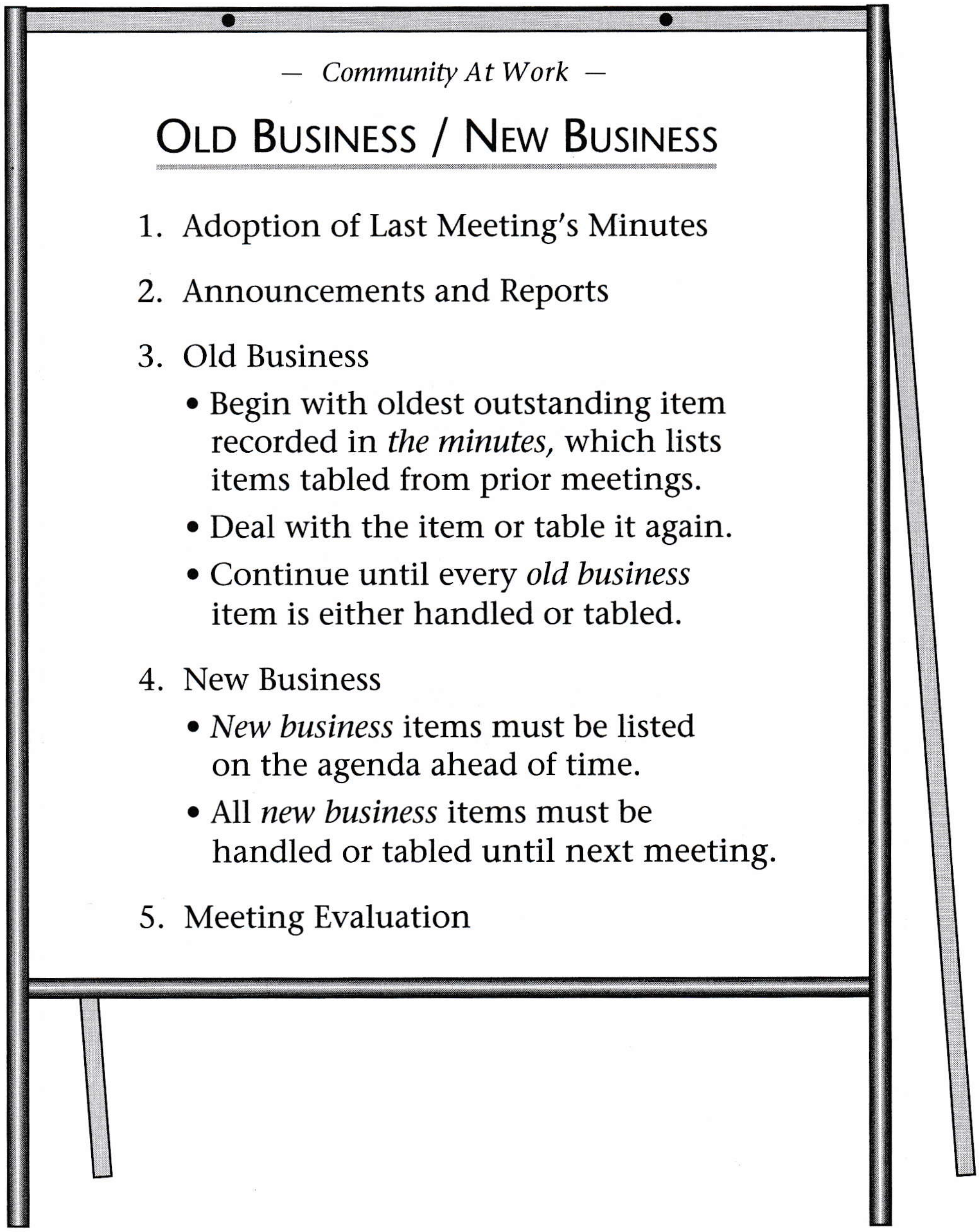
BEST USE: This format is used for ongoing management-team meetings at which decisions are needed for several major items the same day.

TIMING: *Quick Business* in this format often takes 30-45 minutes. The items can be handled in a line-'em-up, knock-'em-down fashion. Each *Major Topic* will run 30 minutes or longer. Overall, a meeting with more than one *major topic* should be designed to last at least 2.5 hours. *Major topics* require more attention to process design than *quick business* items. Most *quick business* items can be handled by a simple open discussion.



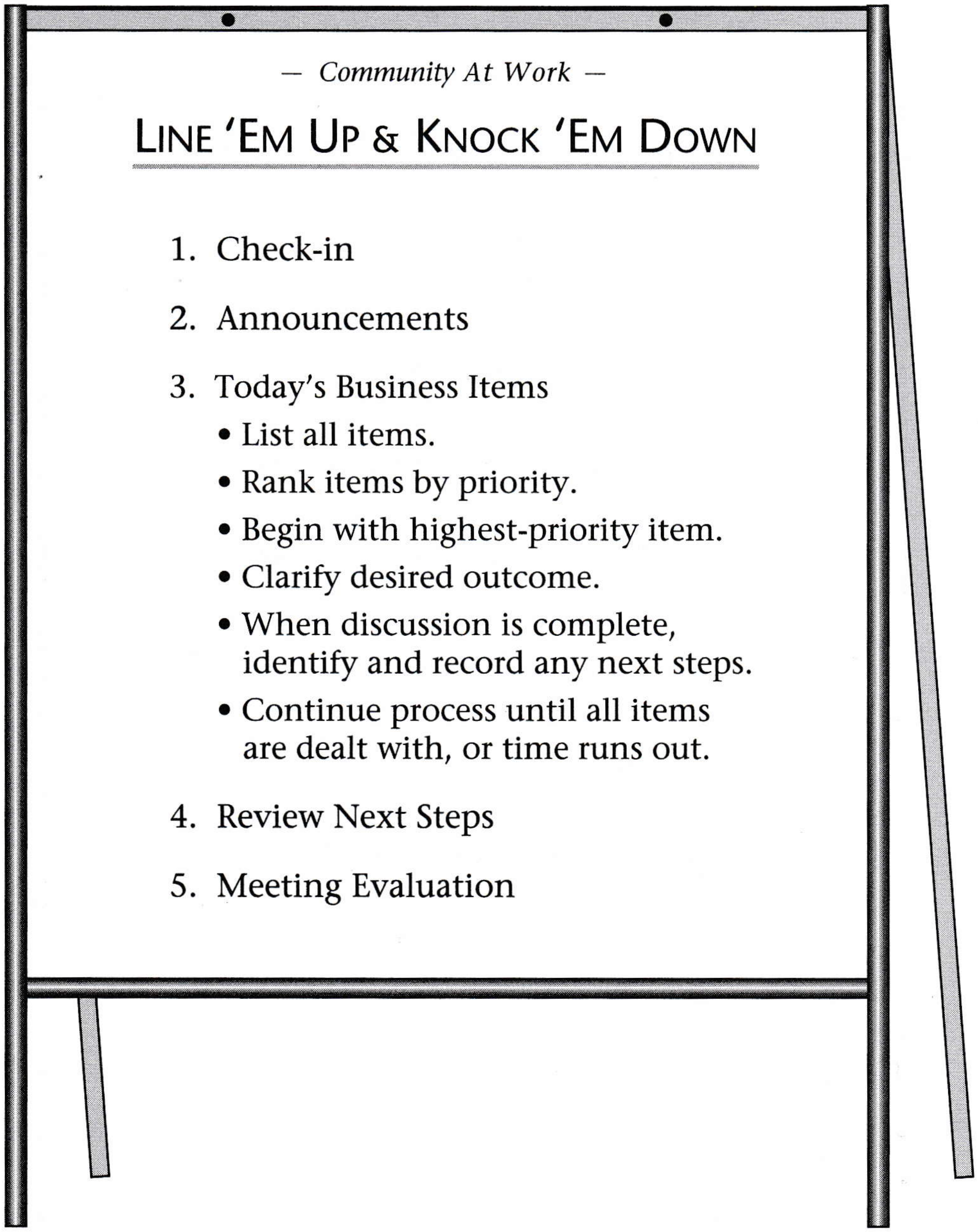
BEST USE: This format works best when a group has been convened to problem-solve a complex issue that has a clear end-goal. Examples include developing a strategic plan, setting an annual budget, or planning a sizable layoff. This type of meeting requires a well-thought-out process design.

TIMING: These meetings typically last 3-6 hours per session. The project often runs for several weeks or more. *Quick business* is best done by giving each person 5-7 minutes to use as s/he wishes. Unfinished items are recorded on a back burner, to be dealt with offline or at the next meeting.



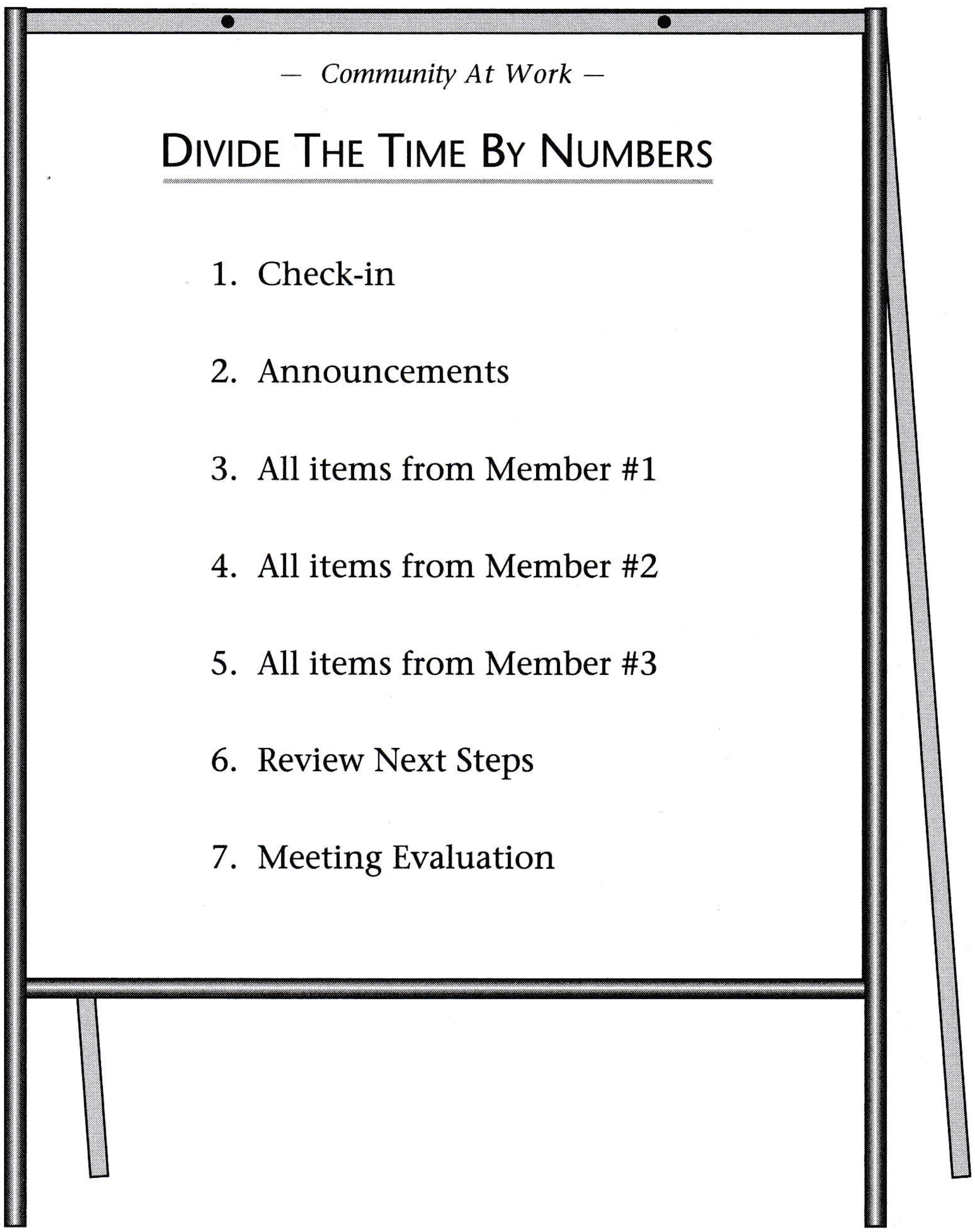
BEST USE: This format – a simplified Robert's Rules – is used in volunteer organizations, especially in board meetings. Since members are not regular co-workers, they tend not to spend much time thinking about the agenda items between meetings. Therefore, the minutes from prior meetings are used as the key tool to structure the agenda.

TIMING: The meeting lasts as long as it takes to complete old business and new business. Under time pressure, groups tend to defer many items.



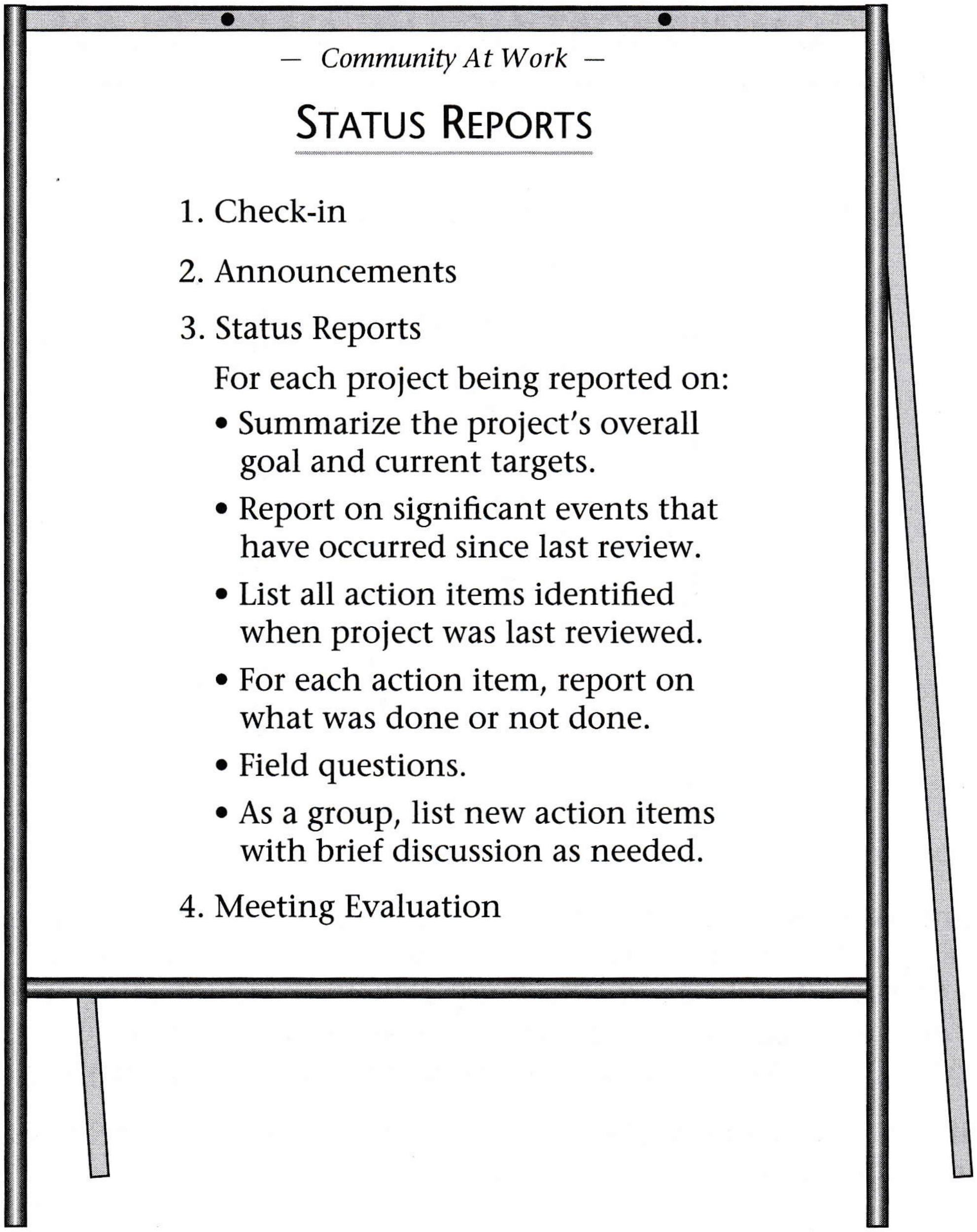
BEST USE: This format is often used at an ongoing staff meeting, at which most business items are straightforward. This format requires no advance planning, and therefore the desired outcome must be clarified in real time during the meeting. When complex topics are raised, they may be discussed as input, but they are rarely decided at the meeting.

TIMING: This type of meeting is usually scheduled to last 1 hour. *Today's Business Items* should run for a set time – typically 45 minutes.



BEST USE: This format is especially suitable for groups whose members have different areas of responsibility. It can be used both to obtain input and to make decisions. However, to be effective, this format requires each member to prepare in advance by defining goals for each topic s/he raises.

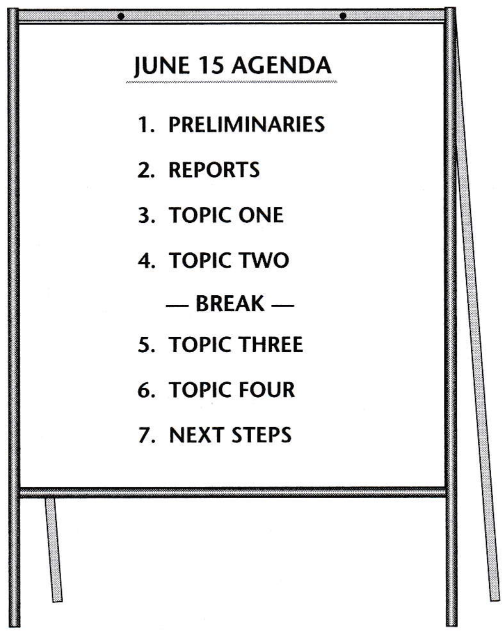
TIMING: Each group determines for itself how much time to allot each member. Everyone receives equal time unless someone negotiates for more.



BEST USE: This format is useful for meetings of project teams. It's also useful for program staff meetings at which most staff members are working independently, and want to keep one another updated.

TIMING: Status reports should take no more than 10-15 minutes per report. Half that time should be spent discussing action items. A meeting should take less than 1 hour. Have some people report every 2 or 3 meetings.

COMMUNICATING THE GAME PLAN



An important aspect of agenda design is the way the agenda is documented. Simply put, the agenda must be *well communicated.* People can't follow a plan they don't understand. Psychologically there is a lot going on at the start of a meeting; it's hard to capture people's full and undivided attention. Therefore, the agenda document must be simple, clear, and easy to grasp.

While the picture shown above is generic, it illustrates many features of a clear, simple agenda:

- The page has a title, and the title includes a date.
- The opening of the meeting is noted, e.g. *"Preliminaries"* or *"Overview."*
- Sections are labeled by topic, and listed in the order they will be worked on. (The assumption is that the meeting leader will describe the logic model for each section, along with any other needed context-setting information, when that point in the meeting arrives.)
- The break (if there is one) is shown.
- The end of the meeting is noted, e.g. *"Next Steps"* or *"Closing Comments."*

AGENDA PLANNING ROLES

THE FACILITATOR	THE PERSON-IN-CHARGE
Explains the importance of reserving time to plan the agenda.	Decides how much time to invest in agenda planning.
Asks the person-in-charge to list all possible topics.	Identifies possible topics and decides which to include.
Asks the person-in-charge to set the *overall goal* for each topic.	Clarifies the *overall goal* for each topic.
Encourages the person-in-charge to define *meeting goals* for each topic.	Sets the *meeting goal* for each topic on the agenda.
Suggests thinking activities for the group to engage in during each segment of the meeting.	Considers facilitator's suggestions, weighs trade-offs (quality vs time expenditure), and decides for each segment.
Puts together a draft agenda, complete with time estimates.	Makes any revisions to the draft and validates the final agenda.
Does not present the agenda at the meeting. (The person-in-charge is the owner of the outcomes.)	Presents the agenda at the meeting and explains the objectives for each item.

INVOLVING PARTICIPANTS IN AGENDA DESIGN

BUILDING A WHOLE AGENDA

When no one has pre-planned a meeting, or when members want to do their planning as a group:

1. List potential agenda topics.
2. Prioritize topics.
3. Set desired outcomes for the highest priority topic.
4. Establish a process for working on that topic – for example, open discussion? Small groups? Other?
5. Do the work for that topic.
6. Repeat Steps 3–5 as time permits.

WORKING WITH PLANNERS

Some groups want to have a say in the selection of topics while leaving the details of meeting design to one or more planners:

1. At the end of a meeting, or by email after the meeting, have group members suggest topics for the following meeting.
2. Planners set desired outcomes for each topic, communicating with other members as needed.
3. Planners take full responsibility for process design for each topic.
4. An agenda is posted ahead of time, and comments are invited.

RATIFYING PRE-WORK

When limited meeting time is available and the group still wants a high level of agreement on meeting content:

1. Post the agenda at the start of a meeting or circulate it beforehand.
2. Begin the meeting by asking each individual for agreement to proceed. Obtain affirmations from everyone.
3. If changes are suggested, facilitate a decision-making process. (This can prevent more serious disputes from undermining the meeting later.)
4. Mark the posted agenda to show new agreements. When ratified, proceed.

DESIGN PRINCIPLES: SUMMARY AND INTEGRATION

An agenda is a dual-purpose tool. On the one hand, it's the game plan for the meeting: a theory of how a meeting will unfold. It consists of an organized sequence of meeting segments. Each segment has its own logic model: a topic, one or more desired outcomes, and a process for reaching the outcome. On the other hand, it's a document that communicates the game plan to participants. As such, it has to be clear and simple – easy to grasp.

Keeping both purposes in mind, here are the design principles, step by step, that you can use to create an effective agenda:

AGENDA DESIGN

STEP 1 Determine who the agenda planner(s) will be, and whether and how to obtain input from other participants.

STEP 2 Identify the topics to be discussed at the meeting.

STEP 3 Define the desired outcomes for each topic. (See also chapter 11.)

STEP 4 Create a process that enables the group to achieve the desired outcomes for each topic. (See also chapter 12.)

STEP 5 Completing the first three steps produces a logic model for each section of the meeting. Put the sections into the order in which they will be worked on, at the meeting.

STEP 6 Create a simple, clear document – printed or on a flipchart – that communicates the game plan to participants.

- Title the page.
- Label the opening of the meeting with a short phrase, such as, *"Introductions and Overview"* or *"Preliminaries."*
- Then list sections by topics, in the order they will be worked on.
- Show the break (if one is anticipated).
- Label the ending of the meeting with a short phrase, such as, *"Next Steps"* – or – *"Closing Comments."*

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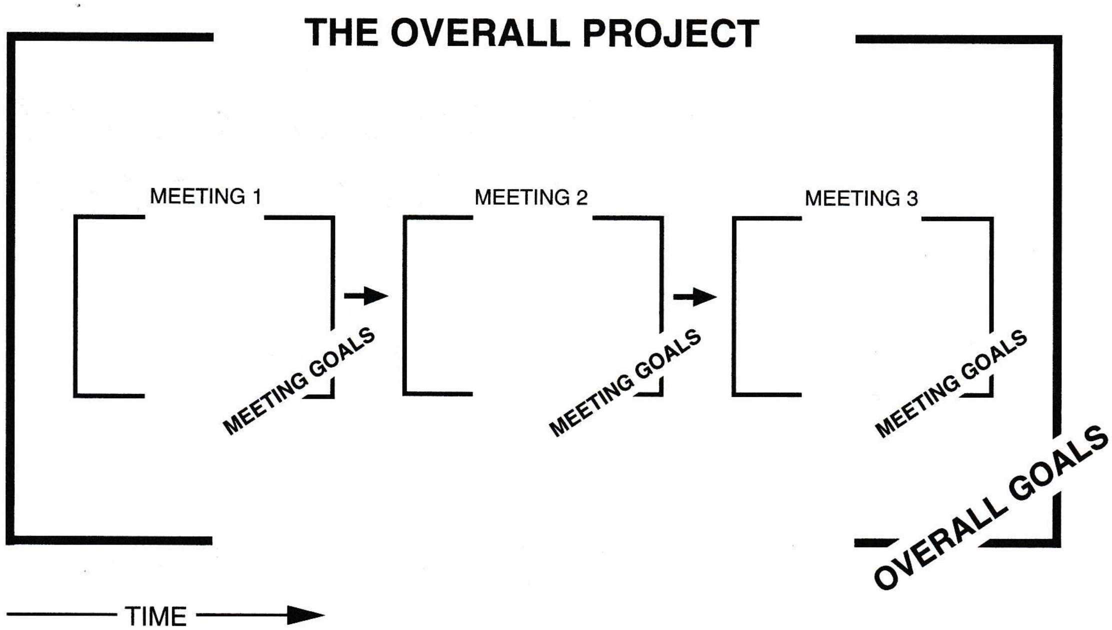
EFFECTIVE AGENDAS: DESIRED OUTCOMES

CONCEPTS AND METHODS FOR SETTING OBJECTIVES

- **Overall Goals and Meeting Goals**
- **Seven Types of Meeting Goals**
- **Setting Outcomes for a Meeting**
- **Defining Desired Outcomes: Questions to Ask a Person-in-Charge**

OVERALL GOALS AND MEETING GOALS

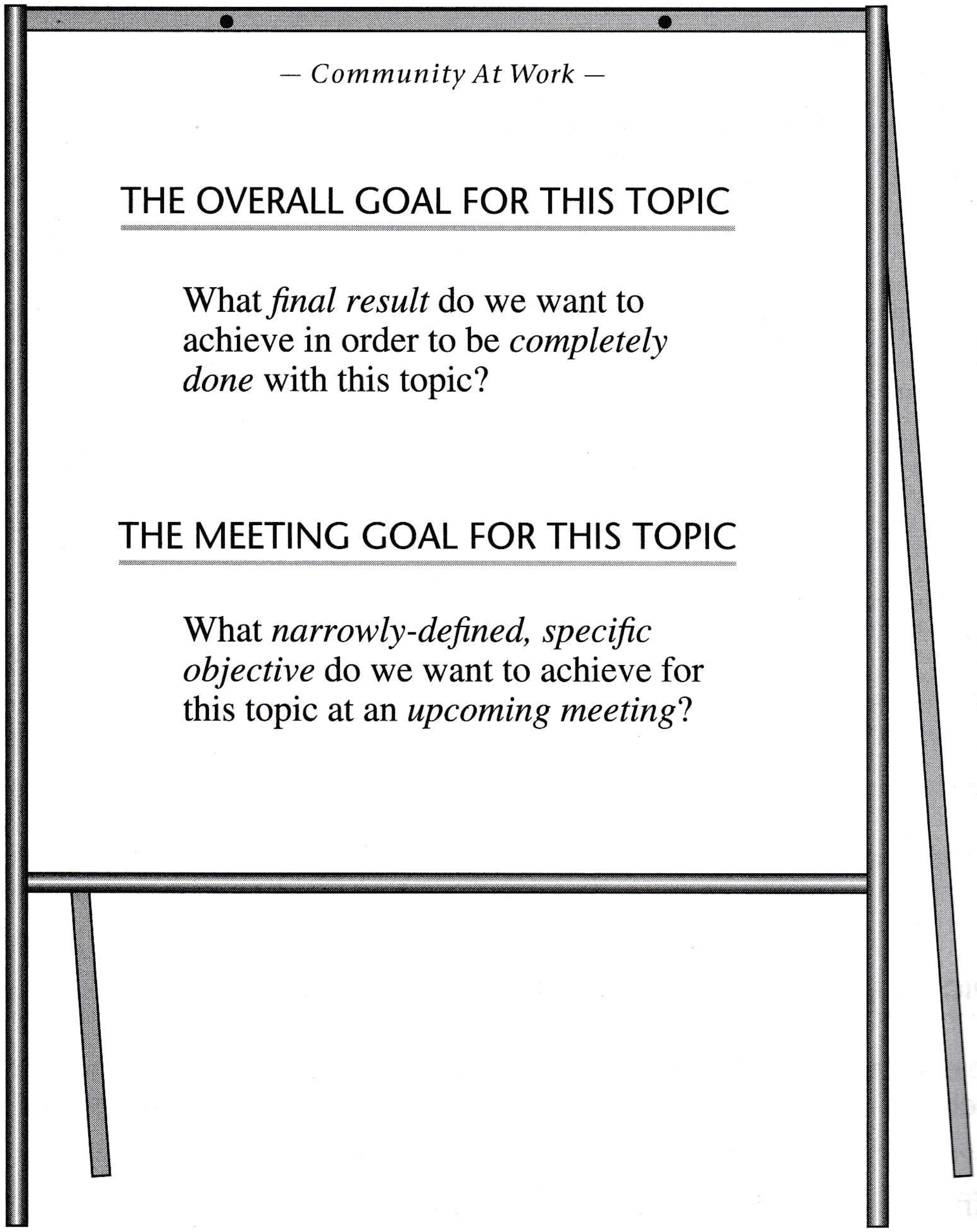


This graphic is known as a *Multiple Time Frames* map.* It was developed by the authors to depict the nesting of short-term goals within long-term goals.

As shown, the *overall goal* of a given project may take several meetings to achieve. By comparison, each meeting can be seen on its own terms, as a context within which the group can make progress toward the overall goal, by achieving two or three narrow *meeting goals*. As the following pages will clarify, *meeting goals* are specific, well-defined, realistic goals, designed to be achieved in the time frame of a single meeting.

* The graphic is also known as a *Milestone Map*. See S. Kaner and D. Berger, *Roadmaps for Strategic Change*, unpublished manuscript, 2006. Contact authors for more information.

OVERALL GOALS AND MEETING GOALS



Defining the desired outcomes for each topic on the agenda is the most difficult task in planning a meeting. At the core of this difficulty is the necessity to distinguish between the *overall goal* for the topic and the *meeting goal* for that same topic.

OVERALL GOALS AND MEETING GOALS

FIRST MEETING

CASE STUDY

A popular local sporting goods store went through a period of expanding rapidly – from five shops to 100 across the country.

Previously they had been able to handle all their human resource needs with one HR employee. Now they needed a real, full-blown HR department.

To design the new HR department and make it operational, the owner put together a project team, led by an HR consultant.

The owner mandated the team to focus on three topic areas:

- *departmental functions*
- *staffing*
- *the budget*

The owner also provided overall goals for each of those three areas.

For *departmental functions* the overall goal would be to define the HR goals, roles, and key systems.

For *staffing*, the overall goal would be to recruit and hire an HR manager and staff.

For *the budget* the overall goal would be to produce a realistic first-year budget.

At the team's first meeting they addressed each topic area as follows.

To begin thinking about *departmental functions*, the consultant prepared a deck of slides that explained the key duties and services most HR departments are responsible for providing.

For the portion of the meeting that focused on *staffing*, the consultant recommended that they focus first on hiring a manager. They agreed, and they created a first draft of a plan for recruiting the manager.

For *the budget*, the consultant produced a list of typical expenses. He then assigned several individuals to go and find out the actual dollar amounts that were associated with each item on his list of expenses.

Everyone felt the meeting had been well-planned and productive.

TOPIC	OVERALL GOAL	MEETING GOAL
Departmental functions	Define HR goals, roles and key systems needed.	Introduce team to key HR services and duties.
Staffing	Recruit and hire an HR manager and staff.	Draft a plan for recruiting an HR manager.
Budget	Produce a realistic first-year budget.	Assign individuals to research the major costs.

OVERALL GOALS AND MEETING GOALS

LATER MEETING

CASE STUDY

Three months later, the HR Department design team had reached the mid-point of its mandate.

By now, most of the work was being performed by individuals at their desks – reading, writing, or talking on the phone.

But the team did meet for at least an hour each week, with members attending by conference call if not in person. And once a month they held a half-day session to do problem-solving and decision-making.

Now it was time for the monthly meeting.

As always, their agenda was organized around the three topic areas they had agreed to focus on.

With regard to the topic of *departmental functions*, the work had progressed to the point where they were ready to hire a contractor to design the data systems for several key functions: job classification, hiring, promotions, termination, and benefits. At this meeting, the group examined proposals from three competing firms: Oracle, PeopleSoft, and a start-up vendor who seemed to be offering more service at a lower price. The goal for this meeting was to select the winning firm.

Regarding *staffing*, they'd made good progress on the development of job descriptions for every role. It was time, everyone agreed, to get out there and hire a good manager.

By the end of today's meeting, the goal was to finalize the manager's job description so they could pass it along to the head hunter used by their company for senior hires.

As for *the budget*, that was the area in which they felt they'd made the most progress. A draft budget had been circulated to the company's VPs two weeks ago and their comments had been collected. At today's meeting, the goal was to review the input and begin revising the budget to reflect what they were learning.

Once again the meeting came off without a hitch, and once again everyone was proud to be part of a process that was so well organized.

TOPIC	OVERALL GOAL	MEETING GOAL
Departmental functions	Define HR goals, roles and key systems needed.	Approve contractor to design key data systems.
Staffing	Recruit and hire an HR manager and staff.	Finalize HR Manager job description for headhunter.
Budget	Produce a realistic first-year budget.	Digest VPs' comments on draft budget, and begin thinking about next draft.

The *meeting goal* for any given topic is the specific, narrowly-defined objective for working on that topic at a meeting. There are seven distinct types of meeting goals. For example, say the topic is "Next Year's Budget," and the overall goal is "Finalize the Budget." A group could set a narrow meeting goal that belonged to any of the types shown above. The next page demonstrates this point vividly.

SEVEN TYPES OF MEETING GOALS

EXAMPLES

Suppose a large project team is working on "next year's budget." That would be the *topic*. Suppose also that their *overall goal* is "Finalize and obtain approval for next year's budget." Now imagine the project manager is planning for upcoming meetings, at which some of the team's meeting time will be spent doing budget work. Here are examples of *meeting goals* that are representative of each of the seven *types of meeting goals* described in this book:

TYPE OF MEETING GOAL	EXAMPLE
SHARE INFORMATION	Bring everyone 'up to speed' on past budgeting decisions, by reviewing key numbers and assumptions from the past three annual budgets.
ADVANCE THE THINKING	Create 3 scenarios for reducing non-salary expenses by 20-30 percent.
PROVIDE INPUT	Obtain opinions and rationales on whether to (a) reduce expenses, or (b) increase revenues, or (c) do both.
MAKE DECISIONS	Finalize the categories of expenses that (a) will be reduced compared to last year; (b) will not be reduced; (c) will be forecast to grow.
IMPROVE COMMUNICATION	Clear the air of lingering frustrations that originated with a serious budget-planning error.
BUILD CAPACITY	Take a few hours to train the whole group in accounting principles relevant to our budgets.
BUILD COMMUNITY	Celebrate good cost-reduction ideas by giving out inexpensive, fun prizes and posting goofy pictures.

MEETING GOAL: SHARE INFORMATION

DESCRIPTION When someone makes an announcement, a report or a presentation, his or her meeting goal is to *share information.*

EXAMPLE A project team is going to start working on their budget. Their overall goal for that topic is, "Finalize the budget for this project." To achieve this goal, the project manager anticipates that the group will work on the budget over the course of the next three meetings. At the first of these three meetings, the project manager's objective is to make sure everyone understands how project budgets are constructed at this company. Her plan is to show people financial data from three comparable projects that were completed last year.

KEY INSIGHT For anyone who is getting ready to share information, it's normal to think mainly about the best way to communicate that information. Should I make slides? With graphics? Should I turn them into handouts? How much time do I have? It's also normal to see the recipients of this information as "the audience." And most group members have a matching perception: they *do* see themselves as the audience, being "talked at" by a "presenter." The resulting dynamics are often numbing. In practice, however, this presenter-audience mindset is neither helpful nor accurate. When information is being shared in the workplace, recipients are not an audience to be entertained, they are the *end-users* of that information. Meeting planners who understand this can build in opportunities, like quick conversations in pairs, for group members to *digest* what they are hearing, *so they can apply it when and how they need to.*

MEETING GOAL: PROVIDE INPUT

DESCRIPTION When someone brings a topic to the group for feedback or suggestions, and s/he only wants comments, not decisions from the group, then his/her meeting goal is for the group to *provide input.*

EXAMPLE Continuing from the preceding page, the same project team is working on the same budget. The overall goal for this topic is, "Finalize the budget for this project." This time, however, the planner has a different meeting goal. He wants to find out how people will react to three different budget scenarios. He doesn't want a decision, he wants their opinions.

KEY INSIGHT When participants understand that they are being asked to provide their input, not to make decisions as a group, they spend less time trying to persuade their colleagues to change their minds. Instead, the savvy ones focus on influencing the person who asked for input. More often than not, this person is their boss.

Sometimes participants don't realize that the goal is to *provide input.* They might instead think they have been invited to participate in making decisions. So they put effort into critiquing and debating, with the hope of creating support for their ideas. When the boss then proceeds to make a unilateral decision after obtaining everyone's input, those who mistakenly thought they were decision-makers often become frustrated and demoralized. The well-known complaint, "Why ask for my opinion if you don't want to use it?" reflects this confusion. Fortunately, most occurrences of this problem can be prevented. Just make it clear that the meeting goal is to *provide input,* not to *make decisions.*

MEETING GOAL: ADVANCE THE THINKING

DESCRIPTION Most projects involve several stages of work, and normally, many steps of thinking are embedded in each stage. Yet progress usually entails taking one step at a time. A planner who understands this principle can become more precise in setting realistic and useful objectives.

EXAMPLES Here is a sample of ways to *advance the thinking* at a meeting:

- Define a problem
- Analyze a problem
- Identify root causes
- Identify underlying patterns
- Sort a list of ideas into themes
- Evaluate options
- Draw a flowchart
- Identify core values
- Create a milestone map
- Create a work breakdown structure
- Conduct a resource analysis
- Conduct a risk assessment
- Define selection criteria
- Rearrange a list of items by priority
- Identify critical success factors
- Edit and/or wordsmith a statement

KEY INSIGHT This meeting goal has a high likelihood of producing engaged, thoughtful behavior by group members. It's important, of course, that the particulars of the objective are logical. (For example, when a problem has not yet been well-defined, it would not be logical to have the group evaluate possible solutions.) It's also important to communicate the objective clearly. And group members must understand that the meeting goal is to think, not to make decisions. When those conditions are met, many people enjoy the chance for conversations that use their brains productively.

MEETING GOAL: MAKE DECISIONS

DESCRIPTION Some decisions are simple to make, others are very difficult. Either way, when a planner wants a group to address an issue and *bring it to closure at the next meeting,* the meeting goal is to *make a decision.*

EXAMPLE Simple decisions are those that are easy to think about – either because the stakes are low or because the issues are straightforward and familiar, with predictable consequences. For example, a majority of decisions in most budget-planning processes are routine confirmations of ongoing programs and salaries. Those are often made quickly without much analysis. Difficult decisions, by contrast, are those that must be made in the face of uncertainty, or to resolve competing priorities, or when many interdependent variables are in play. For example, a budget decision to cut a program or reduce payroll usually requires much more analysis and consideration.

KEY INSIGHT The deep question is, "What decision rule will we use to make this decision?" For simple decisions it usually doesn't matter whether the decision is made by a single person with authority, or by a majority of the group, or by consensus of the entire group. Either way, if the decision is easy to make, the group's behavior will probably be affable and mildly detached – basically, a let's-get-on-with-it attitude. However, for difficult decisions, the difference in impact on group behavior is huge. When the boss is the decider, groups often hold back from saying some of what they are really thinking. (*"What's the point?"* is a common refrain.) Whereas if the whole group has to reach an agreement, get ready for the *Groan Zone!* People who have to decide on tough issues are more likely to feel compelled to build shared understanding of the complexities involved.

MEETING GOAL: IMPROVE TEAM COMMUNICATION

DESCRIPTION When a meeting planner wants the members of a group to strengthen their working relationships by sharing feelings and/or dealing with interpersonal tension, the meeting goal is to *improve team communication.*

EXAMPLE A project team missed an important deadline. The sponsor summoned them to his office so he could tell them in no uncertain terms that he was displeased with their performance. Everyone sat in silence. Privately, some people blamed the data coordinator for falling behind. Others blamed the project manager for creating an unrealistic timetable. Still others had their own pet theories of why this project was not succeeding. No one discussed their feelings openly at subsequent project meetings, but morale plummeted. Finally the group scheduled a "team-building" session to raise these issues and clear the air.

KEY INSIGHT This is a challenging meeting goal to execute. It means, essentially, having group members step away from task-related issues, to talk instead about their feelings and their relationships with one another. This calls for everyone to behave very differently than they normally would in a group setting. Deeper, more authentic self-disclosure is needed. So is the willingness to give and receive feedback. Participants have to override their natural tendencies to be protective in the giving of feedback and defensive in the receiving of it. This is no simple matter – many of us are reluctant, for all sorts of personal and cultural reasons, to "get touchy-feely" with our colleagues at work. It's not reasonable to simply announce, "OK, everyone, let's clear the air" and expect people to open up and say what they're really feeling. That could work, but not usually. Rather, it takes a skillful, well-planned approach – first to create a safe, supportive foundation, and then to gently nurture self-disclosure and interpersonal feedback.

MEETING GOAL: BUILD TEAM CAPACITY

DESCRIPTION Capacity-building is rarely viewed as something that can be done at a run-of-the-mill meeting. Instead, it is usually seen as classroom training offered by the training department, and attended by individual members for their own personal development. When instead *building capacity* is treated as a meeting goal for a whole team, it becomes apparent that there are many beneficial areas for group improvement. Problem-solving and decision-making capabilities; increased knowledge of major trends in the team's industry sector; acquisition of methods or best practices that are especially relevant to this team's objectives – these are just some of many options a meeting planner can consider, to *build team capacity*.

EXAMPLE A team for a large project made two unsuccessful attempts at developing their budget. The project manager determined that key members did not understand basic accounting principles, causing them to become lost and confused during relevant discussions. She decided to invite someone from the accounting department to spend a few hours with the group, teaching the relevant essentials of accounting. Later, everyone looked back on that session as the turning point in their budget conversations.

KEY INSIGHT Capacity-building experiences are bonding experiences. They instill confidence that learning has taken place, and hopefulness that the learning will be applied. They provide shared concepts, shared language and a sense of "we've-been-through-something-together." To reap the benefits, of course, requires a plan for applying what was taught at the learning session. If that's done effectively, it will strengthen the maturity and competence of the group as a whole, with ripple effects on innumerable individual behaviors.

MEETING GOAL: BUILD COMMUNITY

DESCRIPTION When a meeting planner wants to promote camaraderie, strengthen the bonds among people who work together, and generally boost morale, the meeting goal is to *build community*.

EXAMPLE The project team decided that they would have a little celebration when they finalized their budget. They did not consider the achievement to be so major as to justify a grand celebration, yet neither did they want it to pass without some formal acknowledgment. The project manager decided to invite the project sponsor to come to the last hour of a late-afternoon meeting, at which time the group would enjoy some light food and libations while the budget was presented to the sponsor for his final approval. By design, the sponsor would have seen the budget ahead of time. His main reason for coming to the meeting was to contribute to the goal of building community, which he did by offering some words of praise to the group – and by staying around to socialize.

KEY INSIGHT Community building is not normally considered to be a legitimate meeting goal. It is often relegated to team building off-sites and fancy dinner ceremonies. This is a misconception of what community building is all about. Morale will stay higher when community building is integrated into the everyday flow of work. Team achievements and life events (like birthdays) can be celebrated delightfully in 5-10 minutes. Other ways to build community include volunteering as a group, sharing reactions to momentous current events, and doing simple creative energizers. The key is to place community building goals onto the agenda, and treat them just like every other meeting goal.

— *Community At Work* —

SETTING OUTCOMES FOR A MEETING

Facilitate the person-in-charge to:

1. Identify all topics for the meeting.
2. Select one to start with.
3. List possible overall goals for that topic.
4. Decide on an overall goal for that topic.
5. Explore which type of meeting goal seems most suitable. Choose one.
6. Define the meeting goal precisely. *

Repeat Steps 1 to 6 with a new topic.

* Example: If the type of meeting goal is *Provide input* (as chosen in Step 5), then the precise meeting goal might be something like, *Provide input about Questions X and Y but not Z* (as defined in Step 6.)

Facilitators should keep in mind that this template is generic. When using it in real life, the person-in-charge will probably hop around from one step to another – or even from one topic to another – without completing the steps in the formal sequence. If this happens, follow his or her lead! Everyone has their own individual style of thinking.

DEFINING DESIRED OUTCOMES

FACILITATIVE QUESTIONS TO ASK A PERSON-IN-CHARGE

OVERALL GOALS

- What does success look like?
- How will you know when you're done?
- Fundamentally, what do you want to accomplish?
- Just to clarify, you're saying you'll all be done when . . .?
- What makes this important?
- What are you shooting for here?
- Tell me more about what you are trying to achieve.
- Suppose you had all the time and money you'd need. What do you *really* want to happen?
- Tell me more about your vision of the future.

MEETING GOALS

- What deliverables do you want this meeting to produce?
- What part of this is urgent?
- What issues will need to be discussed in the future?
- Logically, what needs to be handled first?
- Let's try breaking your overall goal into a few rough stages.
- At the end of this meeting, what do you want people to come away with?
- What could be done after the meeting?
- What could be done before the meeting?
- What could be done by people who are not at this meeting?
- What discussion needs everyone's involvement?

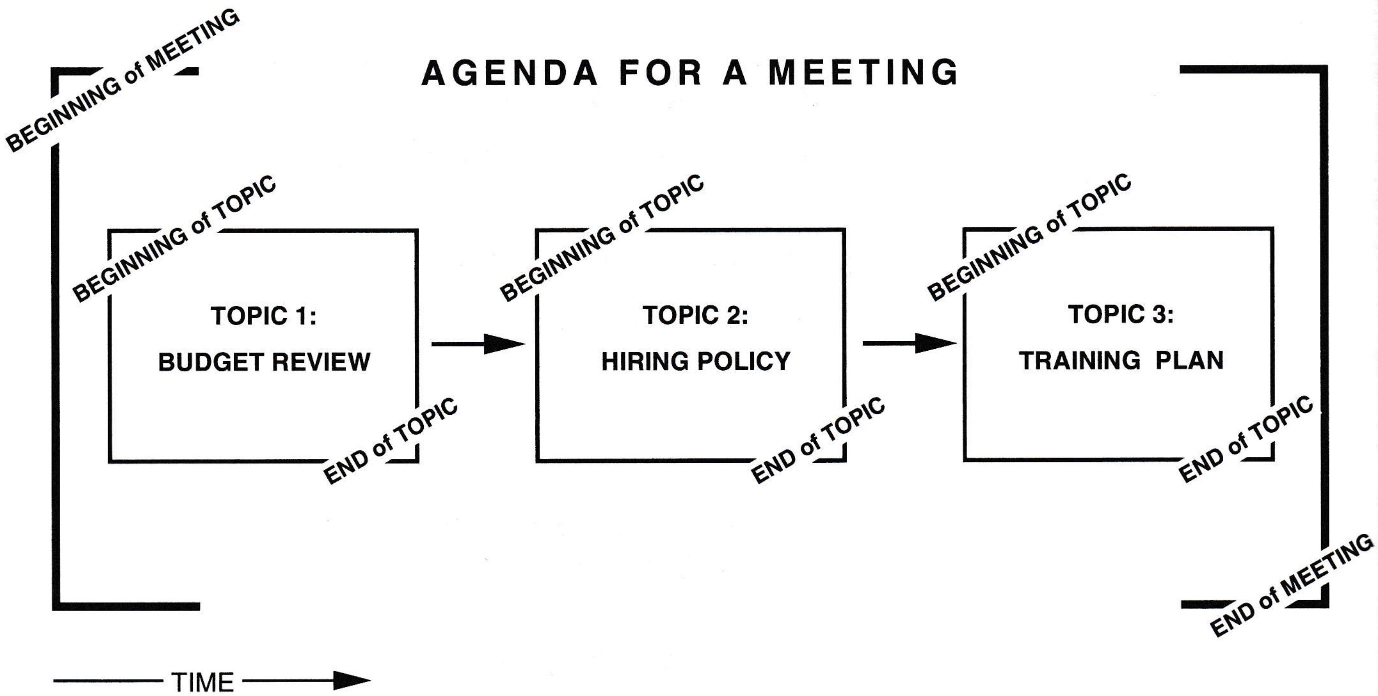
12

EFFECTIVE AGENDAS: PROCESS DESIGN

DESIGNING ACTIVITIES TO ACHIEVE THE MEETING GOALS

INTRODUCTION TO PROCESS DESIGN

A COMMON MISCONCEPTION

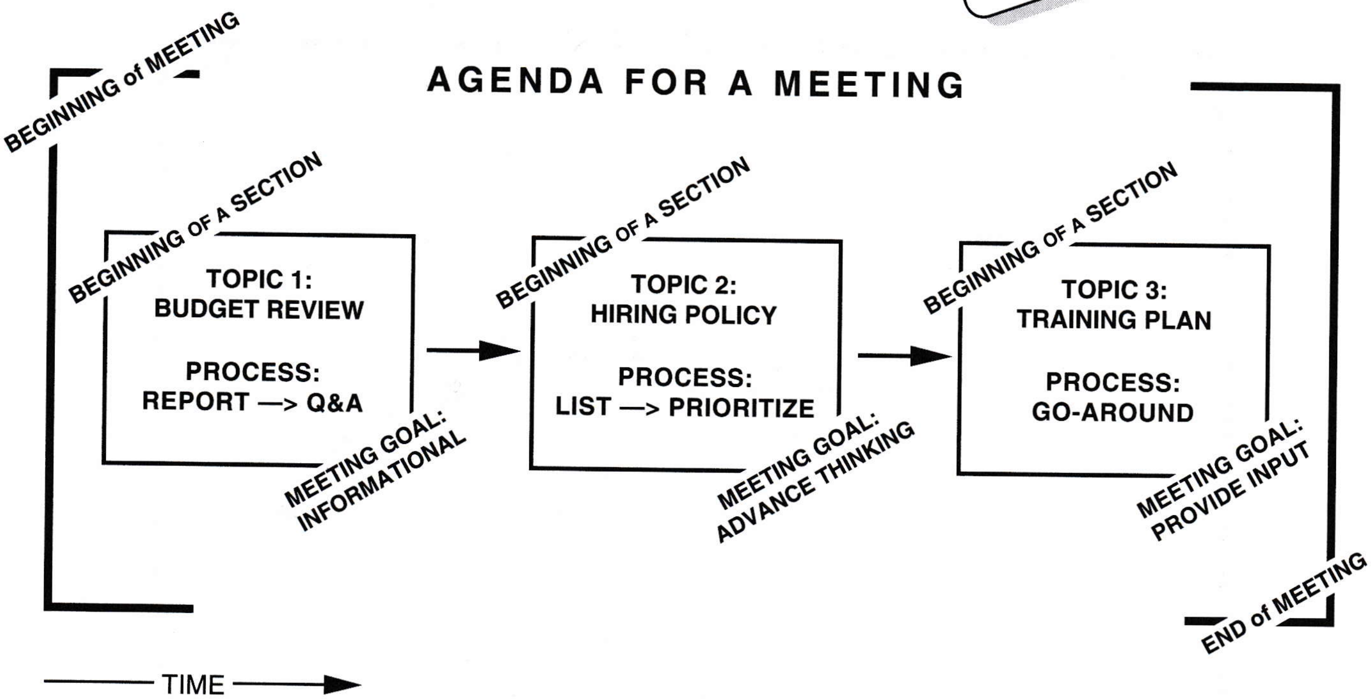


When most people think about what will happen in a meeting, they think about the topics they expect to be covered at that meeting. For example: "First, we should review the budget. Then we should go to our hiring policy. After that, we can resume work on next year's training plan."

This illustrates a confusion about *process* that is prevalent in the minds of many meeting goers. When they speak about the process of a meeting, they're actually referring to the *sequence* of topics that will be covered at that meeting. "We'll begin with Topic 1 and we'll work on it until we finish with that topic. Then we'll move to Topic 2 and work on *that* until we're done with it. Then we'll go on to Topic 3."

INTRODUCTION TO PROCESS DESIGN

A MORE USEFUL CONCEPTUALIZATION



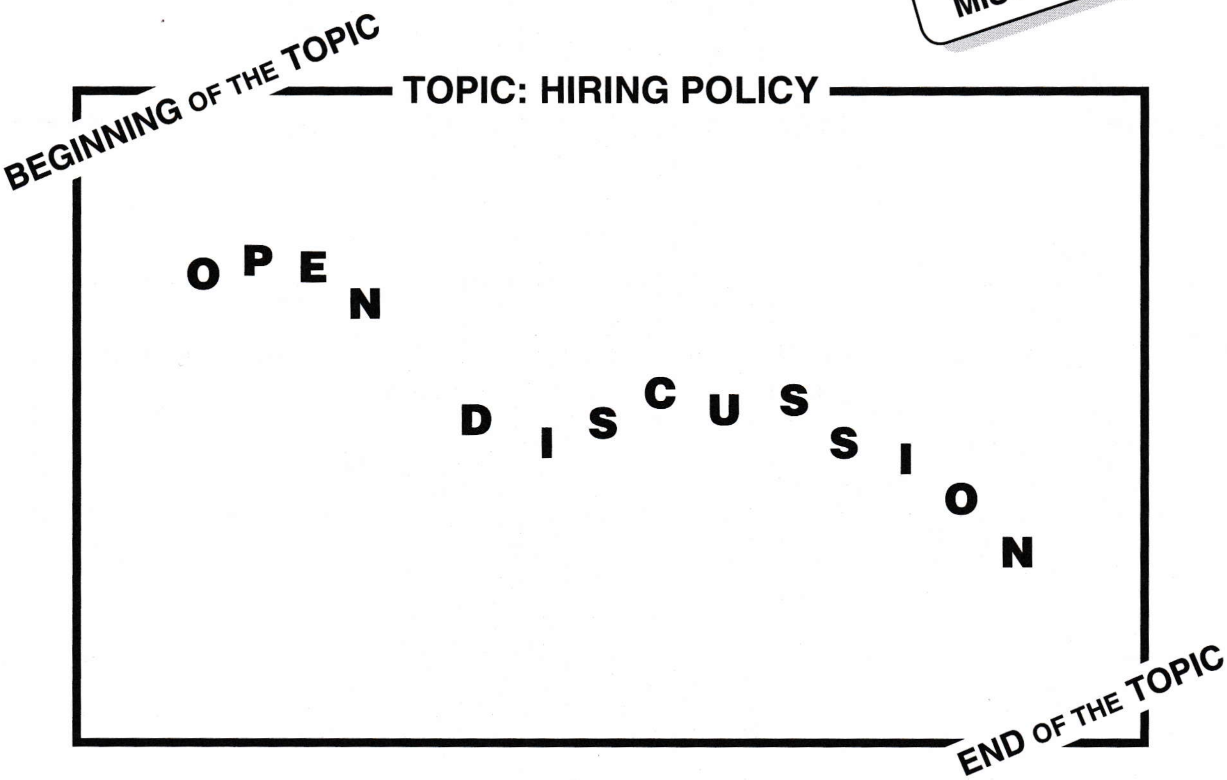
As illustrated in the diagram above, each section of an agenda has its own logic model:

- A topic,
- The meeting goal for that topic, and
- The process for reaching that meeting goal.

When a meeting designer understands the structure depicted by the diagram, s/he can design processes for a meeting with more imagination and with a greater expectation that participants will understand what is expected of them. This translates into a higher likelihood that the desired outcomes for each meeting goal will actually be reached – especially when the goals are ambitious and / or the problems are complex.

INTRODUCTION TO PROCESS DESIGN

ANOTHER COMMON MISCONCEPTION

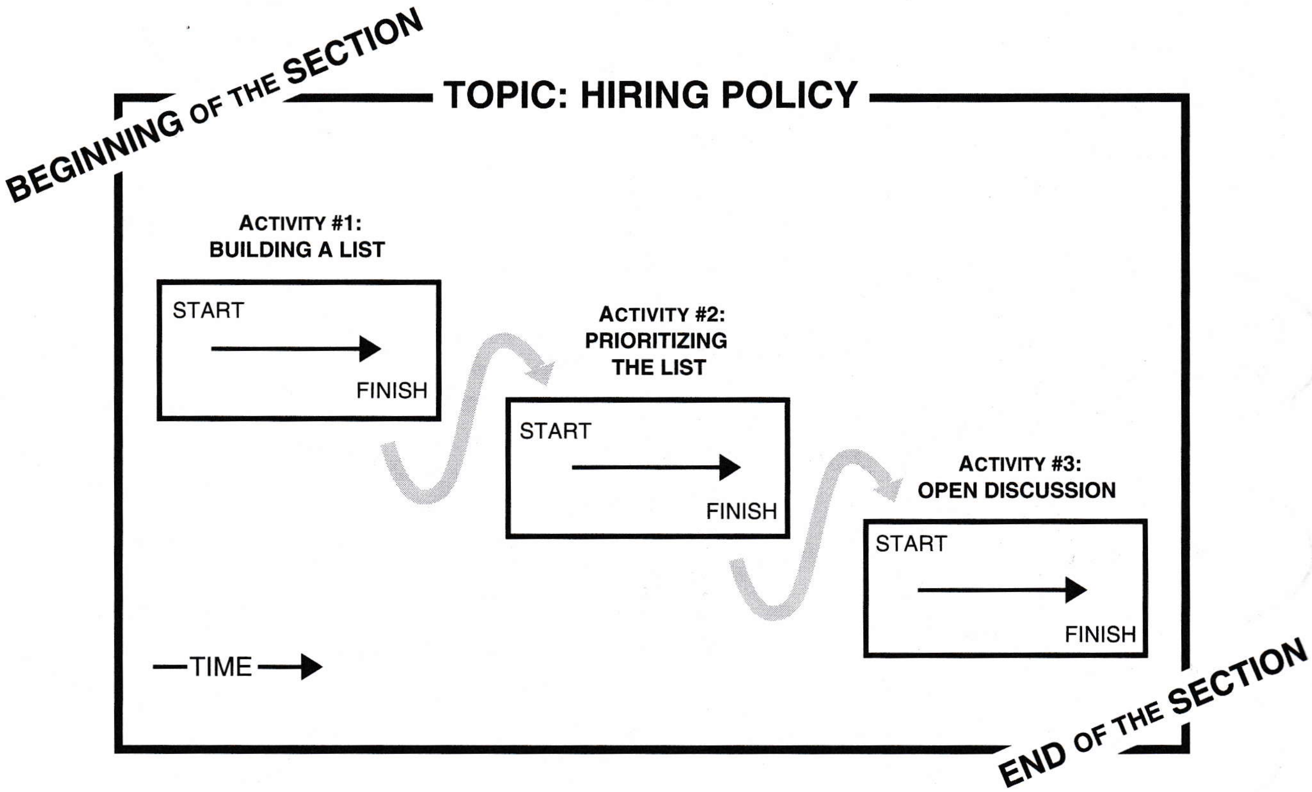


When a topic is introduced at a meeting, most groups automatically slip into *open discussion*. And they typically continue having that discussion until they feel ready to finish with that topic – at which point they move to the next topic and begin *another* discussion.

One might think that *open discussion* would encourage spontaneity and interaction. And it does – for quick thinkers and eloquent speakers. For everyone else, *open discussions are not so inviting*. Yet many leaders persist in using *open discussion* as their default mode for eliciting participation. Why do they do that? Is it because they consciously, intentionally want to put performance pressure on their groups? Probably not. It's more likely that they just don't realize they have options.

This diagram is provided for easy reference to an agenda designer. To encourage the optimal level of participation during any given section of a meeting, the agenda designer(s) can choose among a wide variety of simple formats, as discussed in chapters 6 through 9. Or s/he can select or create structured activities that have specific objectives, like those in chapters 16 through 20.

COMBINING FORMATS INTO A STRING

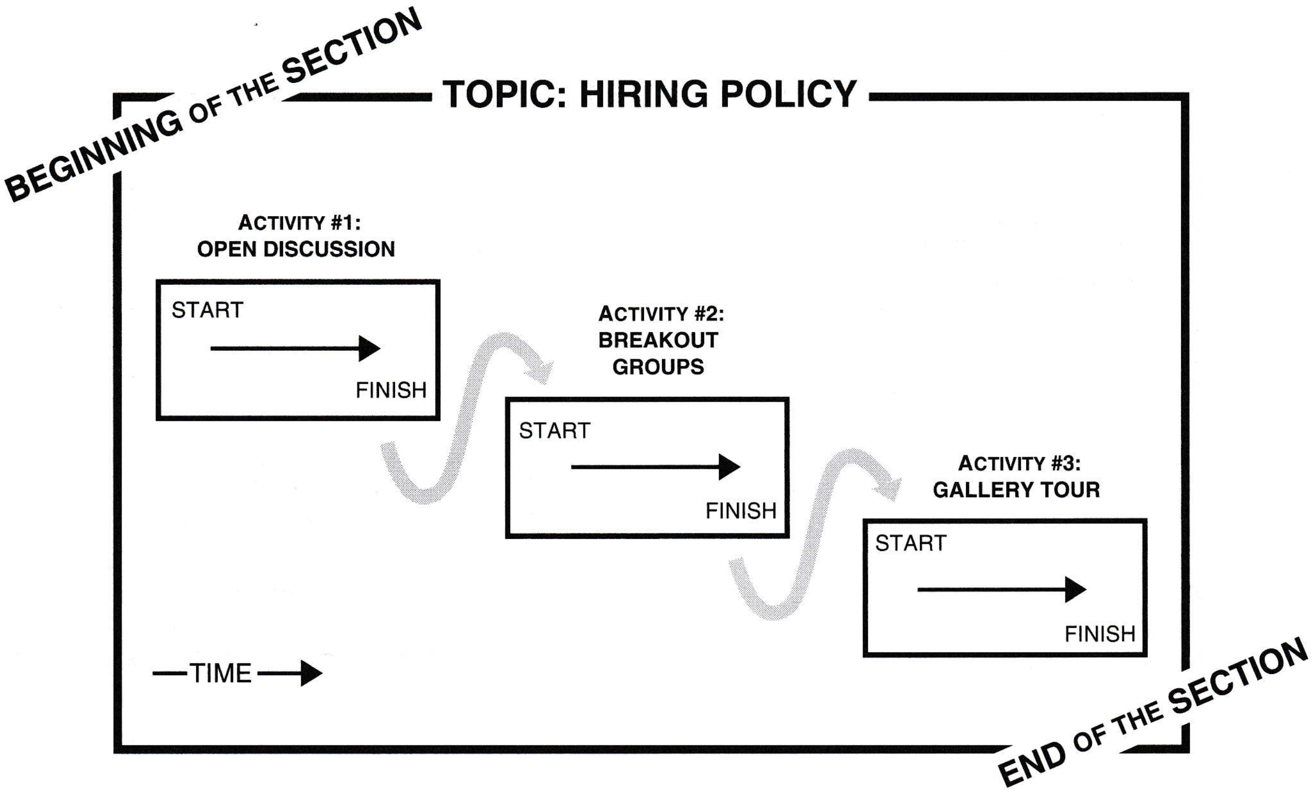


Many people don't realize it is possible to subdivide the thinking time on any topic into different styles of activity. As the diagram makes clear, *open discussion* is one approach to structuring participation in a group; there are many others. Thus, *building a list* and *prioritizing the list* are both participation formats, just as *open discussion* is.

The broad topic – "hiring policy" – remains the same from one activity to the next. It is the *participation format* that keeps changing.

This way of sequencing an activity is called a *string*.

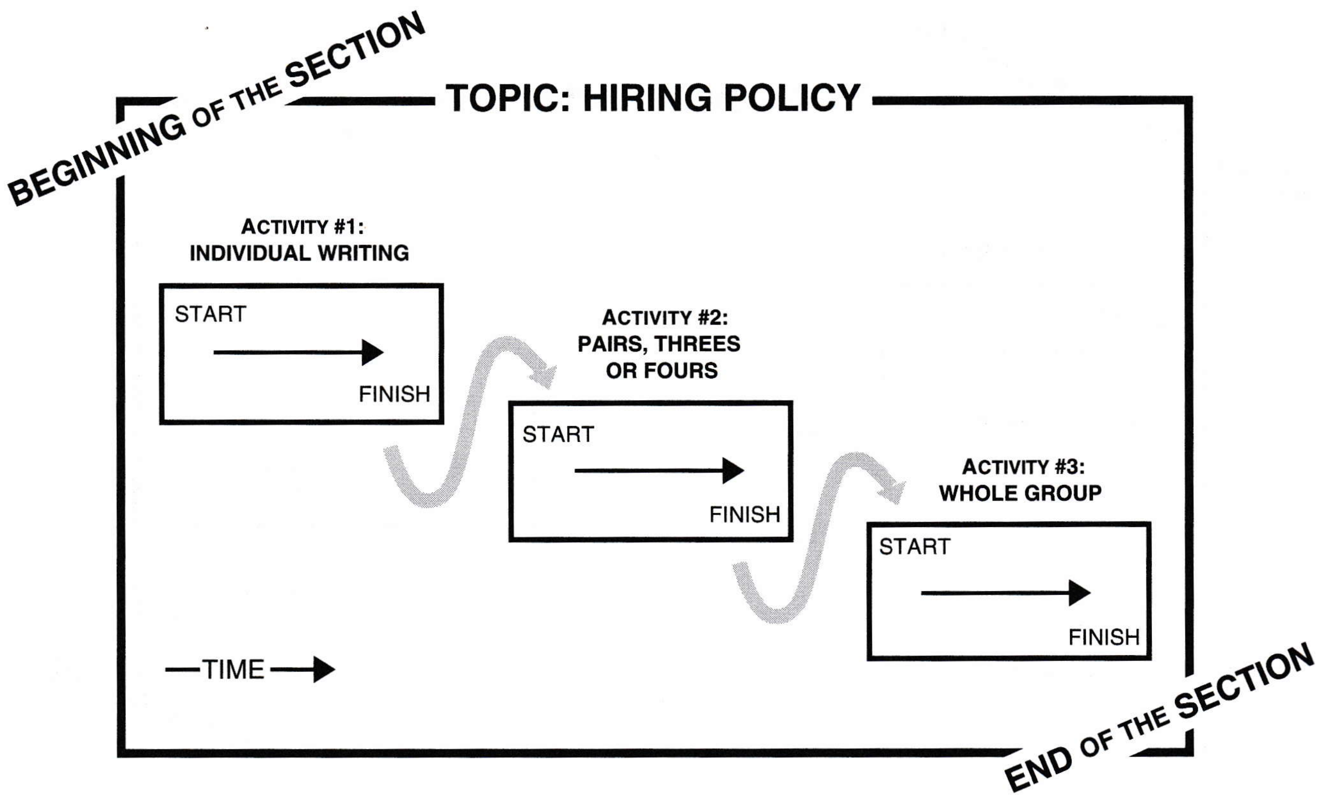
USING STRINGS TO ENHANCE OPEN DISCUSSION



The diagram on the previous page showed a string in which *open discussion* came third, after work on "hiring policy" had already been done in two other formats. It is just as easy to design a process that leads with *open discussion.* That format is then followed by others, such as *breakout groups* (as shown above) or *pairs* (not shown).

Numerous other strings are available to mix *open discussion* with other formats. A group could *begin* with a *structured go-around* and *then* move into *open discussion.* Or the first step could be *threesomes,* or *individual writing* or a more sophisticated format like a *skit* or a *debate* or a *fishbowl.*

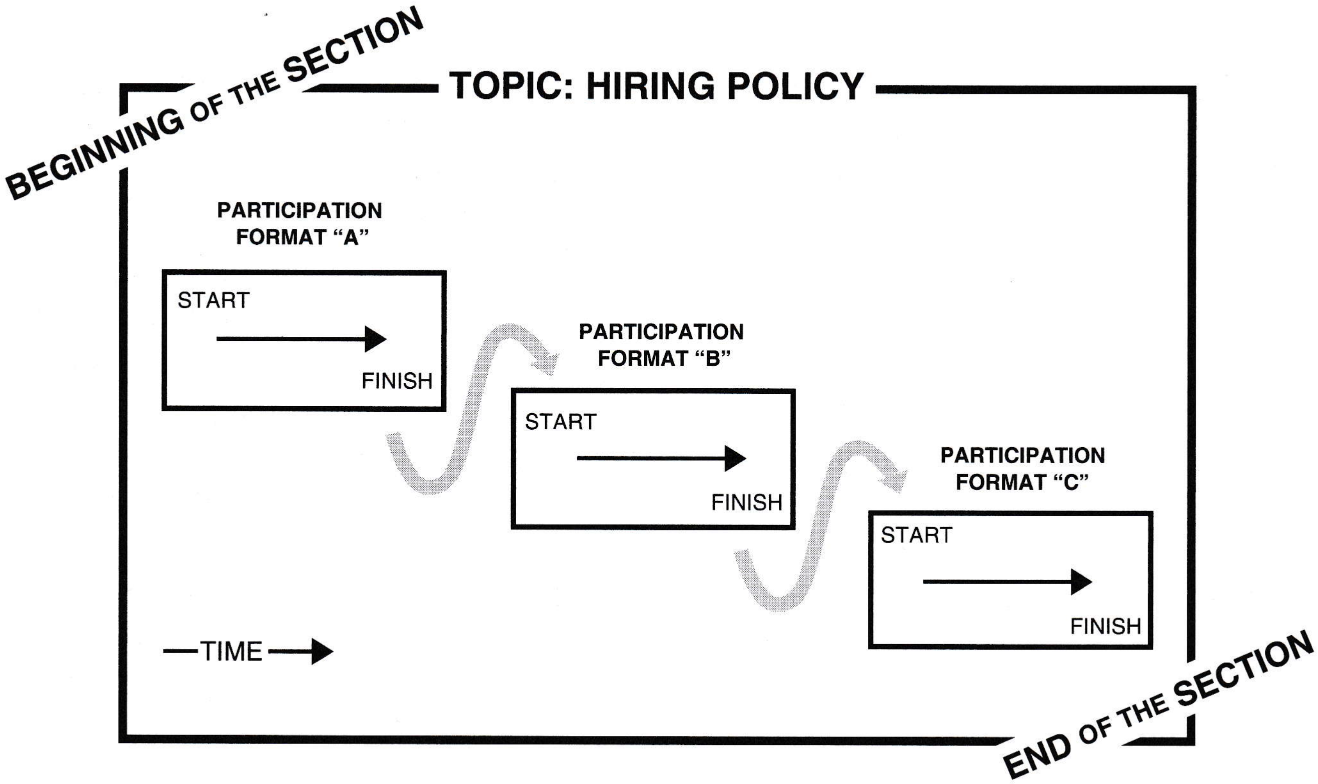
KEEPING THE ENERGY FRESH IN A MEETING



The simplest way to boost energy in a meeting is to give participants frequent opportunities to work individually, in pairs, in threes and in fours. These easy-to-organize, casual, small group formats are crucial for keeping everyone's battery charged.

Using strings that shift back and forth – sometimes working in the whole group and sometimes working in small groups – is truly a "best practice" for facilitators to utilize. Although it seems almost too basic to take seriously, the fact is that this underlying structure will significantly upgrade the "felt experience" of a meeting's quality and productivity.

INSIGHTFUL PROCESS DESIGN



Using strings that vary the *participation formats* during a meeting strengthens participation in many ways. The tight structure of the activities assists people in preserving their focus and staying clear about the short-term objectives of their participation. And the variety supports people to maintain their energy.

Furthermore, your group will have a continuing experience of starting something and finishing it: starting and finishing; starting and finishing; starting and finishing. People have the experience of moving forward step by step, and of getting things done.

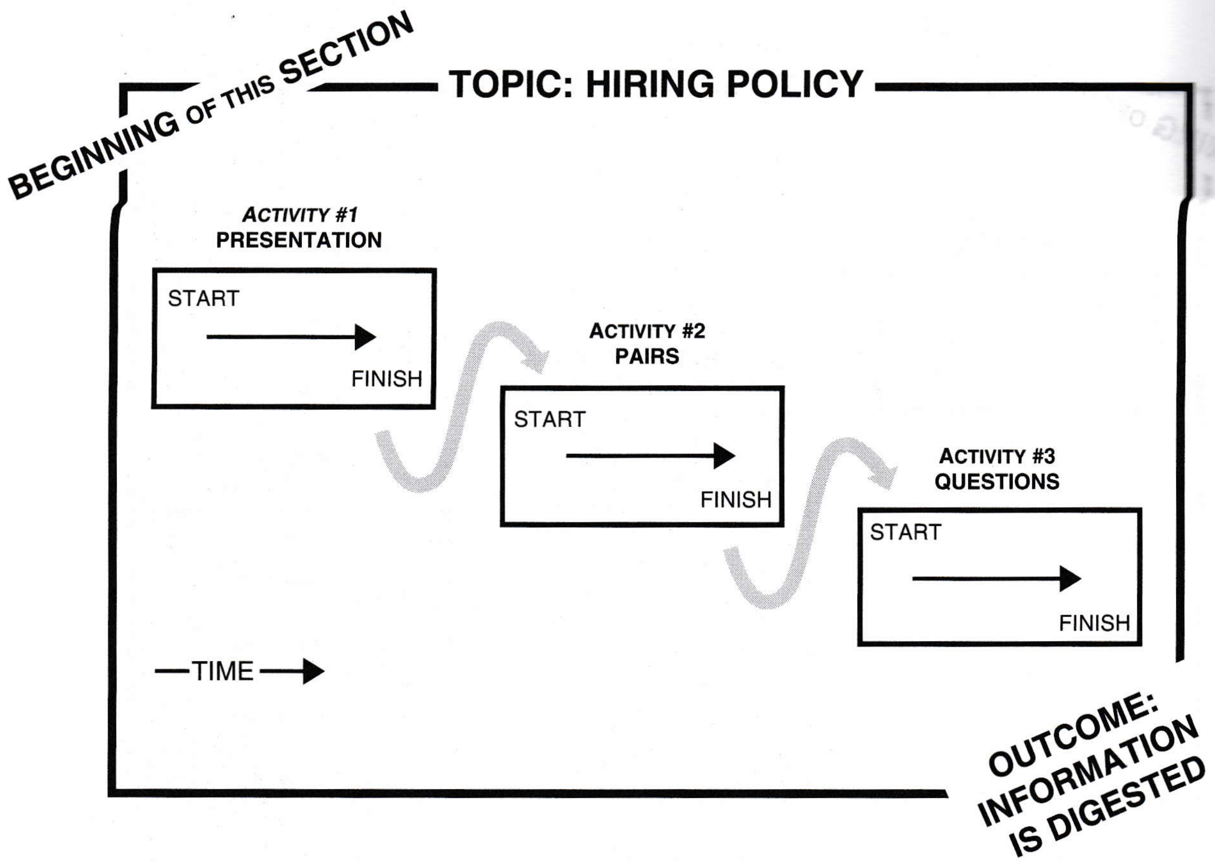
This is how momentum builds.

MAKING TIME ESTIMATES FOR ACTIVITIES

PROCESS	TYPICAL TIME	TIPS FOR ESTIMATING TIME
SMALL GROUPS	6-15 minutes	Decide how much speaking time to allow for each person. Multiply by the number of people in the group. Allow 3-4 minutes for instructions and the shuffling needed to form small groups.
GO-AROUNDS	5-20 minutes for an 8-person group, depending on topic	Assume 30 seconds per person for a simple question, and 2 minutes per person for a more evocative topic.
LISTING IDEAS	7-10 minutes	The time limit for listing ideas is entirely arbitrary. However, more than 10 minutes without discussion is difficult for many to tolerate.
INDIVIDUAL WRITING	5-10 minutes	Allow 5 minutes for writing that is a "warm-up" to something else. Allow 10 minutes for writing that has a substantive purpose.
OPEN DISCUSSION	15-30 minutes	If high involvement is desired, assume the discussion will hit its stride after 5-10 minutes. When an open discussion runs longer than 20-30 minutes, attention will flag.
BREAKOUT GROUPS	30-90 minutes	Decide how much time to allow the groups to work. Then add 10 minutes for the shuffle to and from the breakout areas.

A TYPICAL STRING

MEETING GOAL 1: SHARE INFORMATION



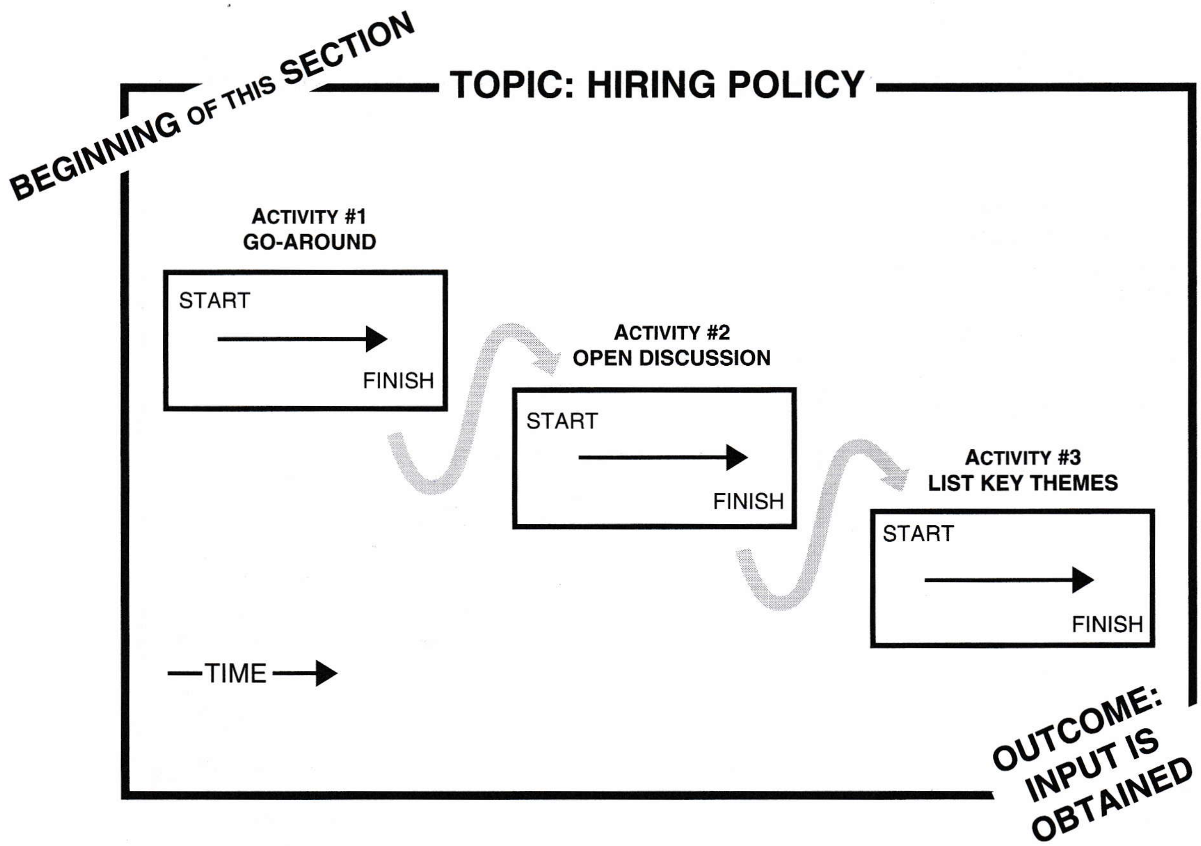
When the meeting goal is to *share information,* the group slips naturally into "audience mode." Basically, most people sit back and listen, and perhaps a couple of members ask questions.

The string shown above shifts that energy. By having everyone turn to a person nearby and react to what they've heard, all group members are guided to engage with the substance of the presentation. Invariably, this leads to more questions – and more interesting questions – when the whole group is reconvened.

If a meeting designer has a reason to pull for even more participation, s/he could use a *structured go-around* as the third format in the string. Or, s/he could use *individual writing* as the format – asking participants to write anonymous questions, which are then drawn from a hat.

A TYPICAL STRING

MEETING GOAL 2: PROVIDE INPUT

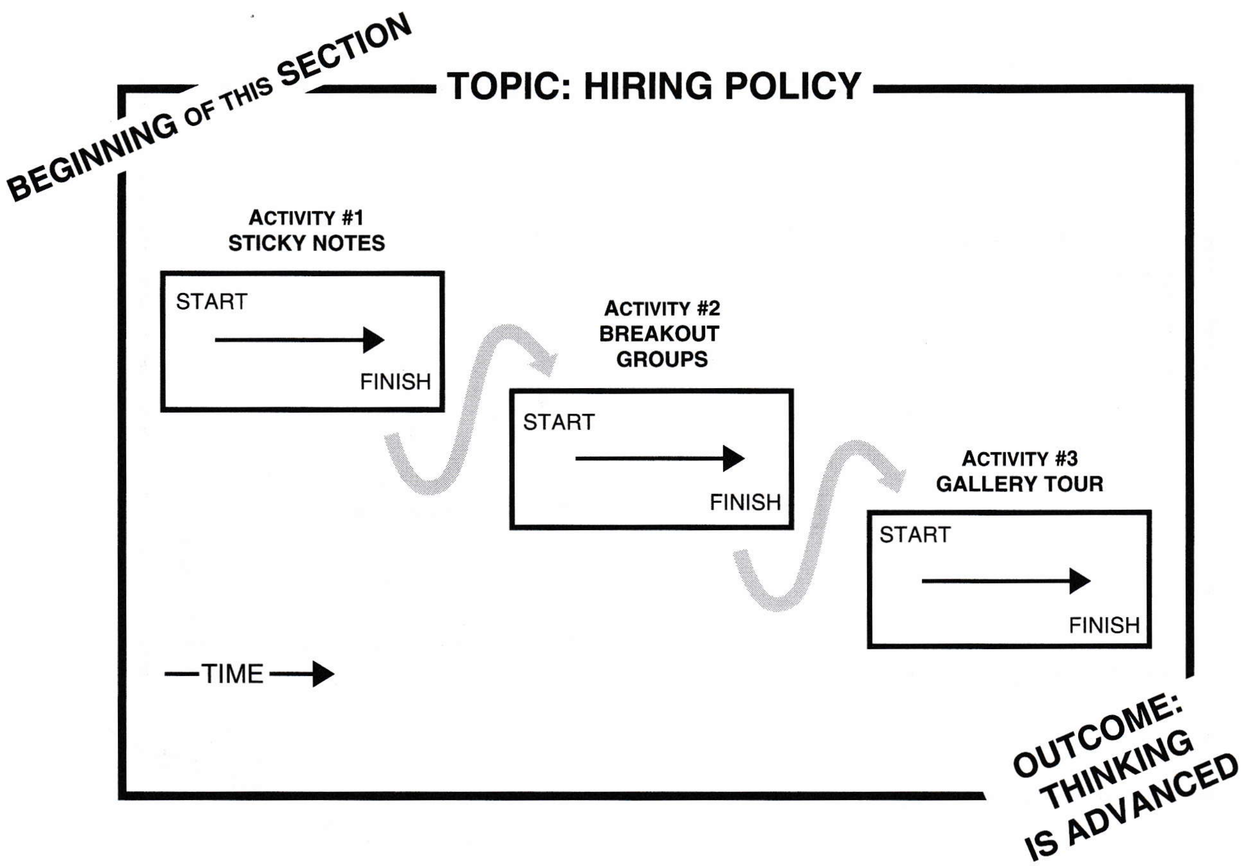


When the meeting goal is to have the group *provide input,* the most straightforward way to manage a group is with a simple *go-around.* That gives everyone a chance to speak up and influence the decision-maker. If a meeting designer wants members to react to each other's inputs, a string like the one shown above will encourage participants in that direction. Alternatively, the designer could start the process with a *list-building* activity, such as listing pros and cons of the idea for which input has been requested.

If the meeting designer wants to intensify the quality of input, s/he could include *debate* as one of the formats, or send people into *breakout groups* to develop different perspectives more thoroughly.

A TYPICAL STRING

MEETING GOAL 3: ADVANCE THE THINKING

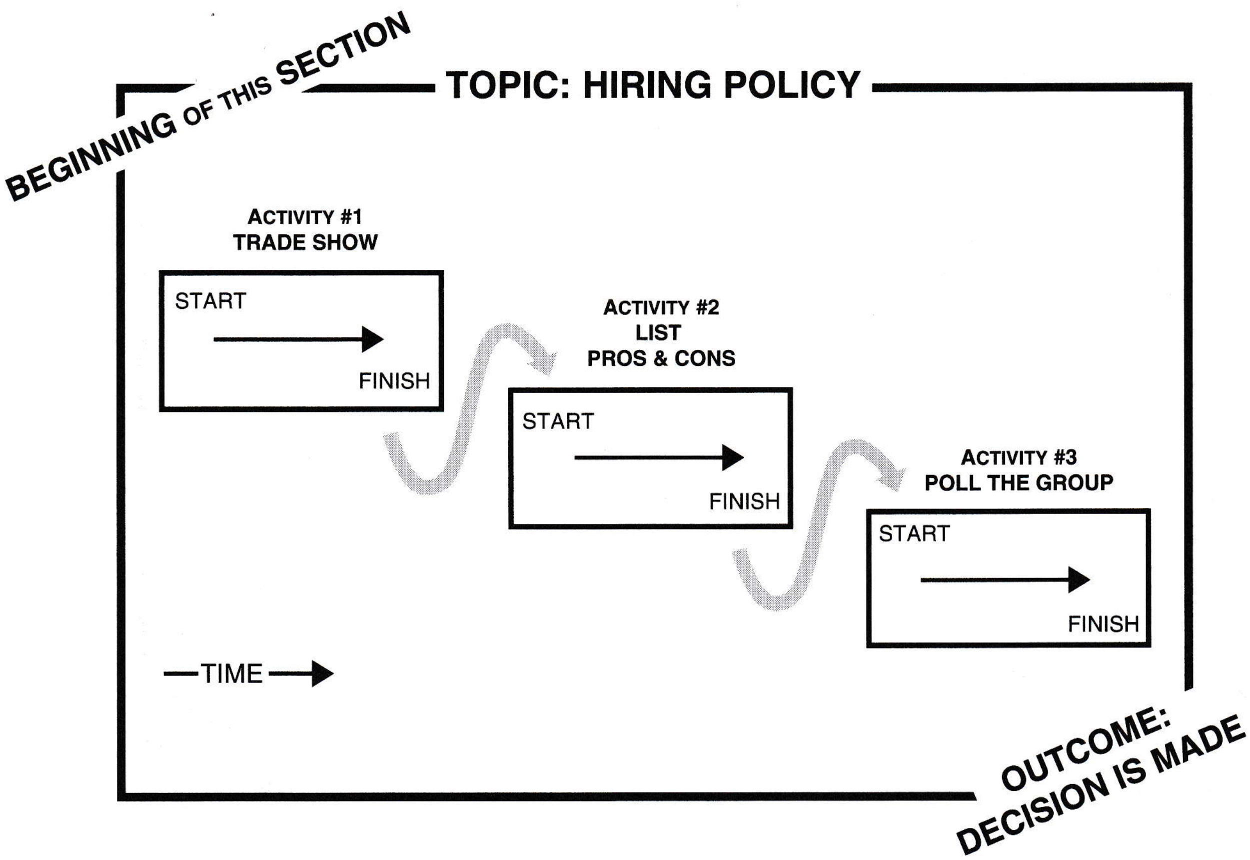


When the meeting goal is to *advance the thinking,* participants often tackle the objective with enthusiasm. (For many people, it's fun to think together when they know their work isn't heading straight to a decision.) The string shown above is one of an enormous number of combinations that might be useful – whether to define, analyze, reframe, narrow, resolve or evaluate the issues at hand.

Many of the activities offered in chapters 18-20 match up quite well with this meeting goal. So do several other well-known problem solving tools not included in this book, such as force field analysis. If a process can be adapted for use by groups, it probably belongs on the list of activities that can *advance the thinking* when appropriate. In general, choose formats that (a) stimulate multiple perspectives and (b) utilize those multiple perspectives to perform the type of thinking required.

A TYPICAL STRING

MEETING GOAL 4: MAKE DECISIONS

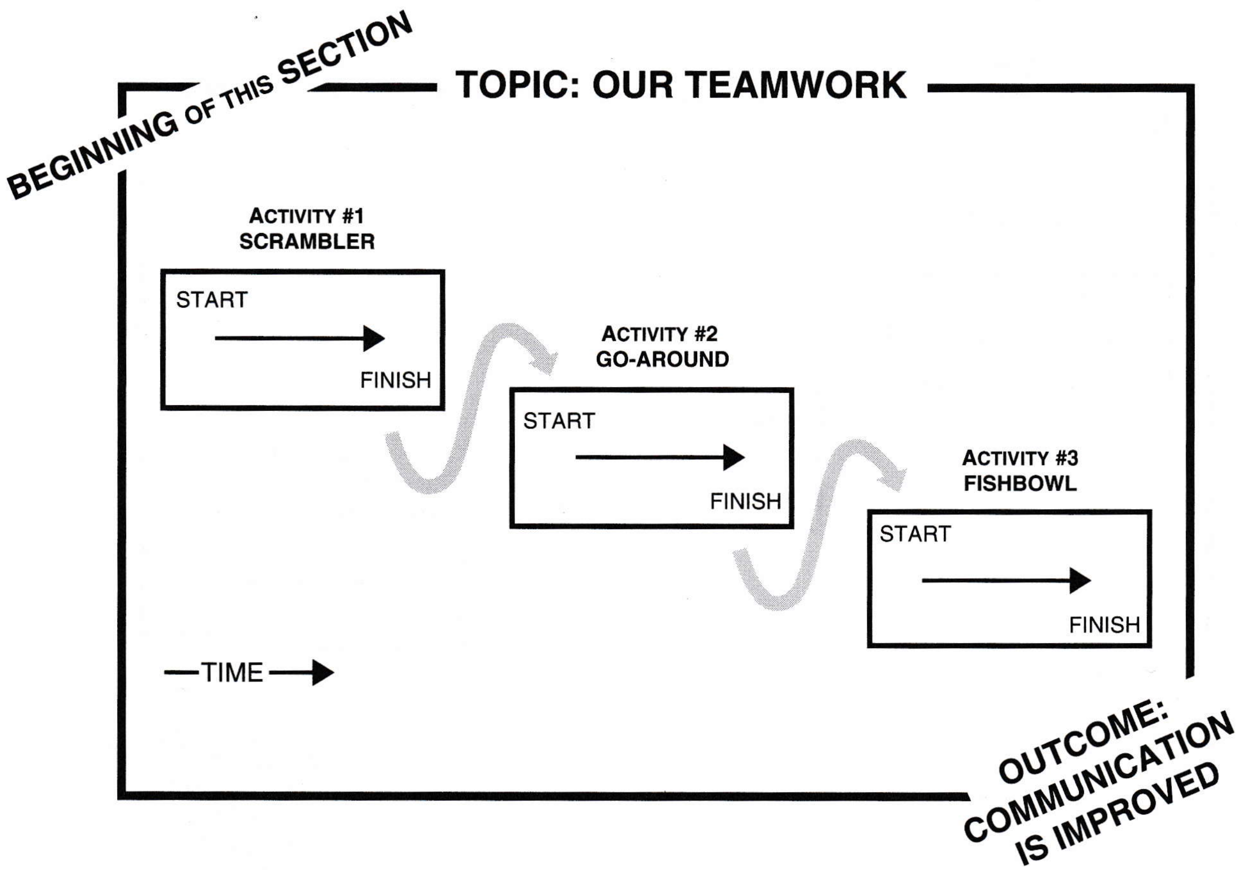


When the meeting goal is to *make decisions,* a group's level of engagement can vary quite a bit. For a low-stakes decision, a meeting designer would want the group to dispense with the issue quickly and painlessly. When the stakes are high, or when the decision must resolve a contentious problem, it's likely that the group will spend time in the *Groan Zone,* a likelihood that the meeting designer should anticipate.

The string above was designed for a decision that required agreement from the whole group. First, three proposals were offered, in a *trade show* format. Next the group *listed pros and cons* of each proposal. Then the group was polled, using G*radients of Agreement* (chapter 23.) The first two formats built shared understanding, and the third tested for the degree of convergence among the group.

A TYPICAL STRING

MEETING GOAL 5: IMPROVE TEAM COMMUNICATION

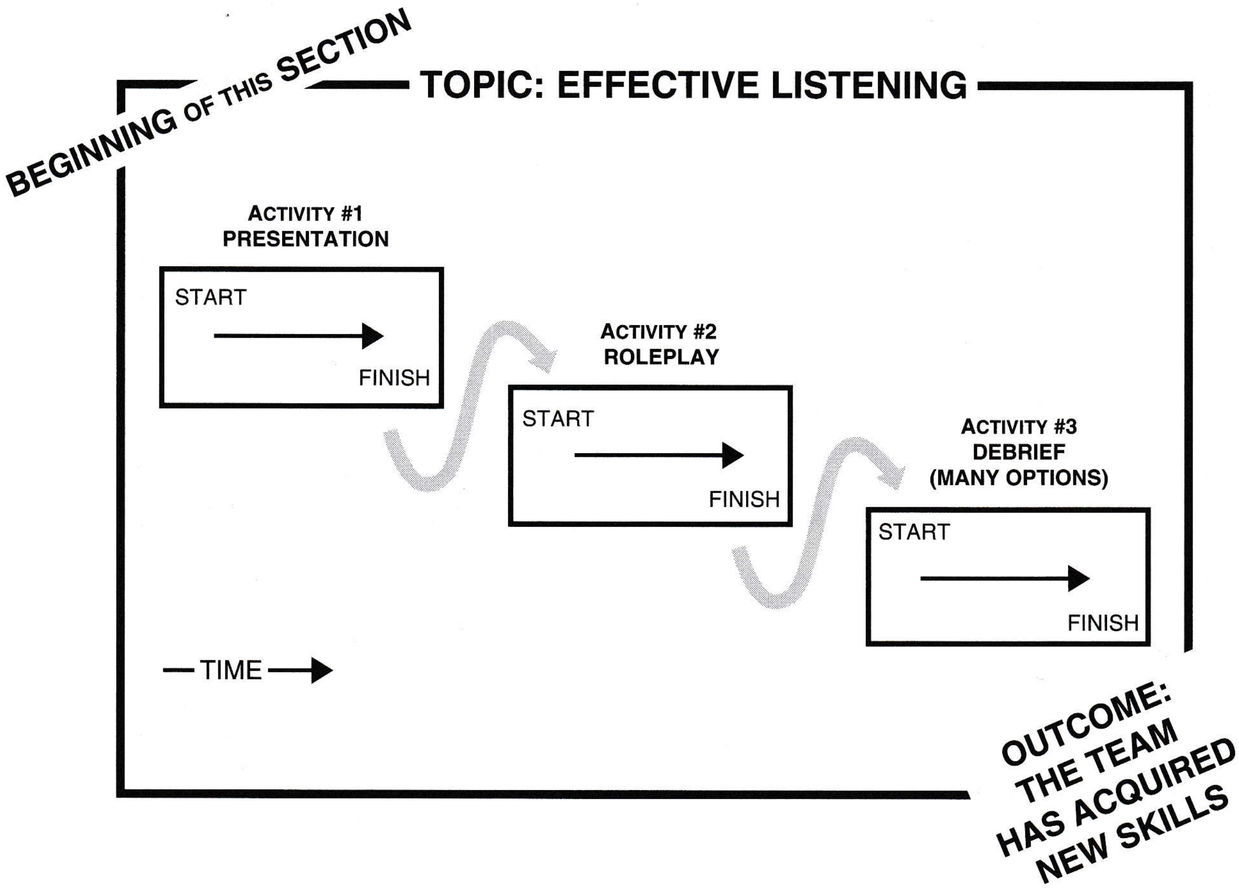


When the meeting goal is to *improve team communication,* many team members can be expected to behave cautiously, shying away from the potentially difficult interpersonal interactions that might be necessary.

The string above was designed to optimize safety. A *scrambler* is just a high-structured way to provide people with the privacy that comes from working in threes, and it's ideal for encouraging personal sharing. The *go-around* completes the cycle of self-disclosure, and prepares the group to take the next step toward giving and receiving feedback. By then, a variety of interpersonally-oriented activities could work. The *fishbowl* shown above can be used with several options from chapter 19 – such as *If I Were You* and *Couples Counseling.* And once the trust level has been strengthened, the simple choice – *open discussion,* with shifts into *pairs* now and then – is often the one that "feels right" to the team.

A TYPICAL STRING

MEETING GOAL 6: BUILD TEAM CAPACITY

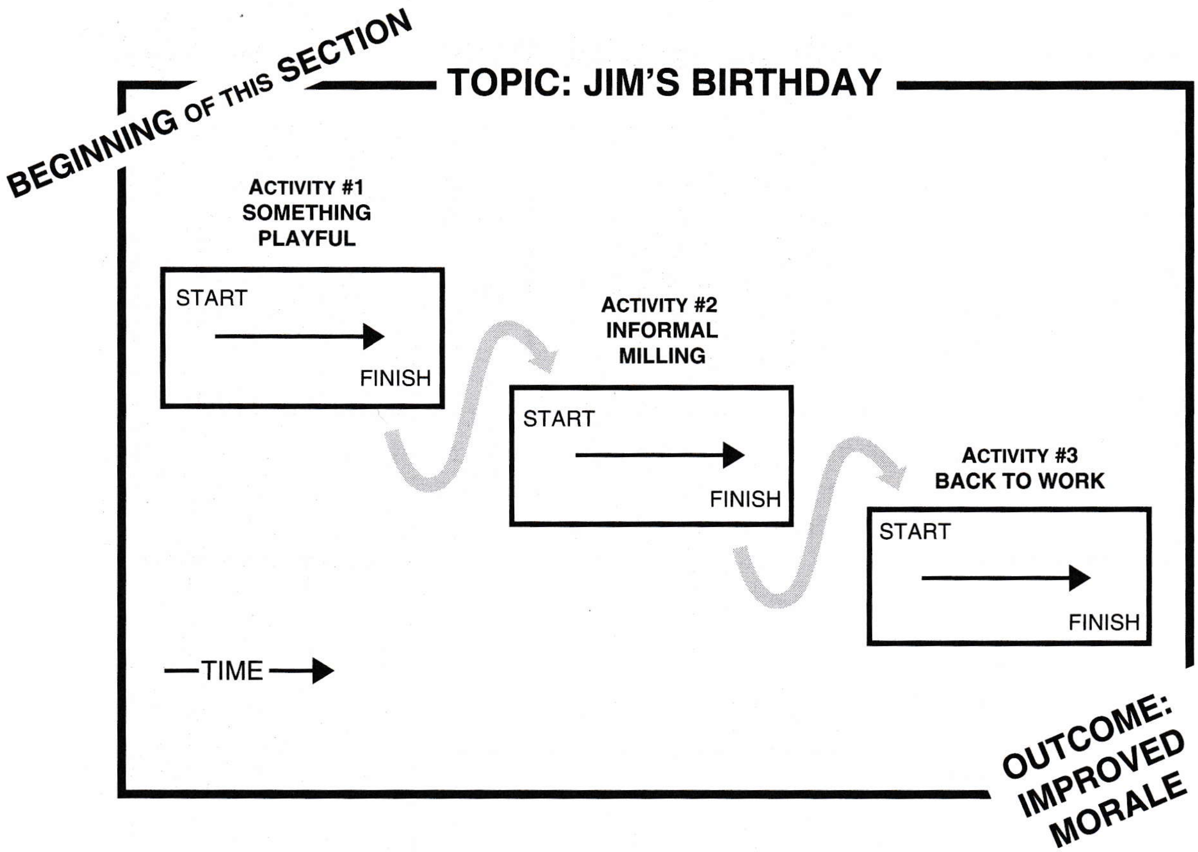


When the meeting goal is to *build team capacity,* the natural tendency of most group members would be to approach the agenda with all the positive and negative attitudes associated with classroom learning. In essence, people can be captivated by the prospect of learning something that is interesting and new, and they can be easily bored if the teaching mode is simply to pass out handouts and show lots of slides.

The string above demonstrates that a training approach can be taken even within the confines of a regular staff or managers' meeting. A brief *presentation* can frame a subject, after which a 10-minute *roleplay* – or a *case study,* or a *skit,* or any high engagement *structured activity* – can put people in an experiential-learning frame of mind. A debrief can be done in *small groups,* in a *go-around,* in an *open discussion,* or by *building a list.*

A TYPICAL STRING

MEETING GOAL 7: BUILD COMMUNITY

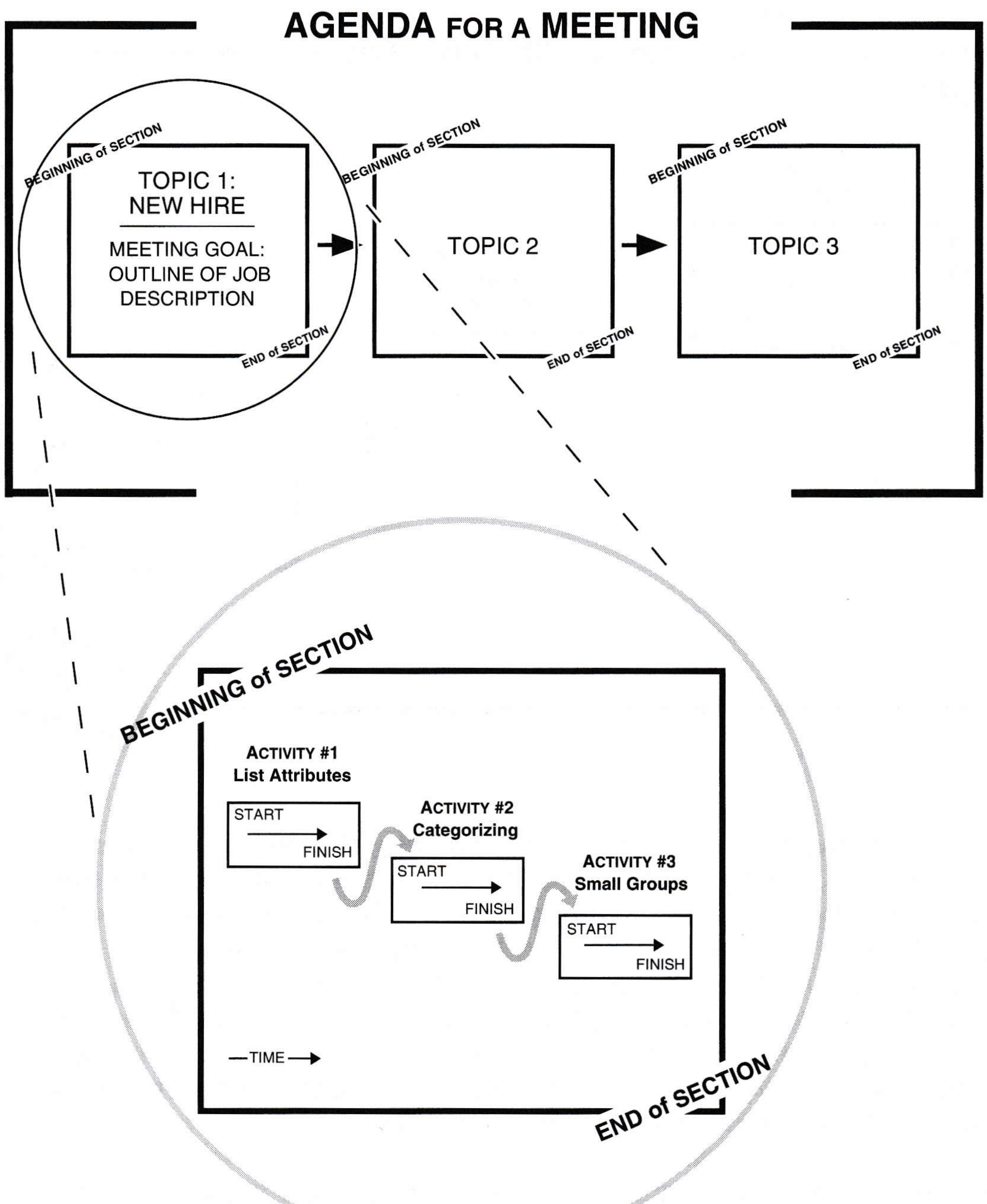


When the meeting goal is to *build community,* the purpose is to promote camaraderie, strengthen bonds, and boost morale. Groups typically split 70-30 between those who are happy to have a few minutes of fun, and those who are reticent to spend meeting time on anything that isn't serious business. But even the grumpiest members can usually tolerate something playful if it happens in a five-to-ten minute time frame. For example, a happy birthday celebration never gets censored. Neither does a *go-around* that gives group members a few minutes to share their reactions to a dramatic current event.

The string above illustrates a useful principle: a few minutes of *informal chat* is an excellent transition from an activity that builds community back to the conventional agenda items. Thus, schedule the community-building activity to occur just before a break, whenever possible.

PROCESS DESIGN FOR AN EFFECTIVE AGENDA

SUMMARY



When a meeting goal pulls for high involvement, a planner can string together three or four different activities to produce the desired outcome. For example, if a meeting goal is to *advance the thinking* on a job description, a group could list attributes of the job; then categorize the list into themes; then break into small groups to write up each theme. This way of sequencing activities is called a *string.*

PROPERTIES OF AN EFFECTIVE AGENDA

- Every topic to be covered at the meeting is clearly identified.

- Both the *overall goal* and the *meeting goal* for each topic have been defined. These may or may not be written onto the agenda, but they can and will be explicitly stated as needed.

- Each meeting goal is supported by a process that has been designed with the intention of encouraging an appropriate level of involvement. The process consists of one or more activities. When no single activity would achieve the meeting goal, a series of activities are combined into a *string.*

- Realistic time estimates have been made for each activity. The estimated times may or may not be posted, but they are stated when the process is described.

- The agenda begins with two grounding items: a frame – usually an overview that lets everyone know roughly what to expect for the rest of the meeting – and a brief welcoming activity, like a check-in.

- The agenda ends with a way to provide participants with a sense of completion: a summary of accomplishments and a review of next steps, an evaluation of the meeting, or an opportunity for everyone to make a closing remark.

- A scheduled 10-minute break occurs whenever a meeting runs longer than 2 hours.

- The agenda is written and accessible – either as a printout distributed to everyone or as a flipchart posted on the wall.