

Effective & Efficient Meetings

Benchmarks & Best Practices

So what's wrong with the **current situation?**

Some of the **COMMON PRODUCTIVITY PITFALLS** often encountered in meetings:

- Didn't start or end on time
- Held in a bad location
- Wrong attendees invited
- Too few or too many attendees
- No decisions were made
- Follow-up actions not tracked
- Meeting is recurring for no reason
- Lack of clear agenda / objectives

- Agenda was not adhered to
- No individual accountability
- Scheduled for longer time than needed
- Attendees did not prepare in advance
- Used a presentation with 10+ slides
- Individual allowed to dominate the conversation either by personality or title
- Debates and discussions were not allowed

- Attendees "worked" or "multi-tasked" during the meeting
- Attendees didn't demonstrate interest
- Scheduled or cancelled at the last minute
- Scheduled with no regard to conflicts of attendees' existing calendars
- Started over when late attendees arrived
- Topic could have been a simple email to the team

A note on effective & efficient meetings:

Effective meetings : When there is a genuine need for the meeting to be set. Having a right cause for setting the meeting.

Efficient meetings : When the set meetings run without deviations, within the timelines, with right forums to yield desired results/decisions.



So learn to...



Defend Your Time:

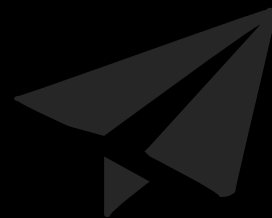
- Exercise the right to decline meetings
- Use “No-meeting” calendar blocks
- Wisely choose your meetings!

Optimize Your Meetings:

- Find the right meeting space
- Shorten meeting duration
- Invite the relevant attendees
- Prepare for key decision-making meetings
- Get attendees to prepare
- Start meetings on time
- Build and stick to a strong agenda
- Minimize PowerPoint in meetings
- Keep the participants engaged
- Hold attendees accountable to action-log
- Gather meeting efficiency feedback
- Improve the next meeting based on the feedback

i How to reduce the amount of time you spend in meetings. This is optimal effectiveness-check

i When to use meetings, and how to plan and execute them for optimal efficiency-check



Defend Your Time

Exercise the right to decline meetings

Teams and employees should be empowered to own and prioritize their time.

The “Right to Decline” is about having the right to allocate your own time. You need to have the power to say no to others when appropriate. No to meetings. No to new obligations. No to interruptions.



We have the Right to Decline meeting requests and place calendar holds: Just because one person wants to talk about something does not mean it should be a meeting



We have the Right to Decline to take on new work: We must be able to ruthlessly prioritize our work and decline to take on new initiatives when they are not a priority



We have the Right to Decline showing up to an event: Just because you are invited does not make it mandatory. We should strive to be team players and enable progress – but not sacrifice delivering on our priorities and goals



We have the Right to Decline a phone call or message while busy with something else: Employees need time to focus and get work done. Multi-tasking can wipe away up to 40% of your productivity. Be empowered to say NO!

Sensibly Decline Meetings:

5 ways to decline a meeting invite or request for your time:



Ask for data or content via email instead.

We've all been asked to attend long meetings simply to review a short weekly report.

Unless it requires a detailed explanation...or you expect questions/discussions/conflict, ask for the content to be sent electronically that allows people to read it on their own time.

If the entire agenda does not look relevant, confirm with the meeting organizer if you can jump in and out, during the time it is relevant for you to attend.



Ask to be sent meeting minutes instead.

We often get invited to meetings just to "keep you in the loop." Instead of listening to 3-4 other people talk while you get live updates (and waste valuable time), ask to have the meeting minutes sent out at the conclusion of the meeting.

Meeting minutes should outline key decisions, action items, and important notes. These should be legible, organized and sent within an hour of the meeting to ensure the meeting is still top-of-mind.

If you can't attend a meeting – ask for the meeting minutes!



Confirm if you are critical in the meeting.

Sometimes you get invites from others tagging you on a mass meeting invite. You know you don't necessarily have anything to contribute, but you don't want to disappoint the organizer. Try a note like the following:

"Hi ____, I am currently focusing on project ____ that is due in two weeks; Can you provide some context to help me understand if my attendance is critical in this meeting?"

Also, ask the organizer if they can pass along the meeting agenda.



Advise priorities when double booked.

When you are double booked, assess which meeting is most dependent on your attendance. A polite decline of the other meeting, stressing the importance of the other meeting should be enough to smooth over any potential hurt feelings.

"Hi ____, I'd love to attend your meeting on ____, however it is key that I attend another meeting at this time in which I am responsible for x,y,z. Please let me know if I can send over anything in advance to help out and I'd love to still be included in the meeting minutes."



Scale it up or down.

Try checking if your Manager or your direct report is attending the meeting and so you can better prioritize. You might be able to scale the meeting up or down to ensure you channelize your time better.

Declare to the quorum beforehand, that someone else will attend in lieu of you.

Block your calendar with “No-meeting” time!

People with busy calendars say that they are booked for so many meetings that they cannot get their work done. This is mostly because they couldn't **assertively push back on some meetings and prioritize.**

So, let's restore your time for better productivity!

The idea here is to protect a good chunk of time – **up to an entire day** - for productivity. Let's spend Friday getting things done. Projects, reports, creative work and One-on-one coaching. Things that require focus-time and are important to **YOU.**

So, how do you protect your time? You need to **block it out.** At the beginning of the week identify blocks of time and **proactively reserve** those times for you to get YOUR work done.

For example, if you block your Friday, you will observe a few things:

- Most people will avoid scheduling on Friday
- A few will not – these are the people who would have double/triple booked your calendar anyway, or they have something important – these are the people you want to meet with anyway

Go ahead and prioritize some time for yourself. These time blocks will quickly become your most productive time of the week!



Optimize Your Meetings

Find the right meeting space

In-Person



Use when the team needs to collaborate on problems or solutions. Ideal for brainstorming sessions, sprint reviews, and team engagement meetings, etc.

- The most effective in-person meetings take place in rooms that are properly sized for the attendee list. Larger rooms allow participants to spread out and possibly not engage in the discussions. Smaller rooms make for a more effective, engaging, and collaborative discussion space.
- Scout out meeting rooms ahead of time to ensure your space is right for your needs. For example:
 - If the team is making decisions, look for a large whiteboard or space to hang post-it notes from a brainstorm.
 - If the team has remote attendees, be sure the room has sufficient dial-in capabilities such as Zoom

Online



Use when some or all of the team are spread out in multiple geographies or remote.

- Tools like Zoom can help make meetings more personal.
- Always encourage attendees to turn on video. This makes meetings more personal and combats multi-tasking by forcing employees to pay more attention.
- Alternative tools for 1:1 voice or video discussions exist including Slack, WhatsApp and Google Duo.

Other Approaches



When someone couldn't attend a meeting, as an alternative, use:

- Pre-recorded video communications
- Minutes of the meeting (promptly within an hour of the meeting time)
- Updating anyone else from their team by email



Shorten the meetings



In most businesses the default meeting time is 1 hour: The truth is that most meeting topics **DO NOT NEED** an hour.



When you schedule your meetings for an hour... *they will last an hour*: Meeting content will expand to fill the time they are scheduled for, wasting participants' time.



More attendees show up late to longer meetings than short ones: 10 minutes late into an hour long meeting is much different than 10 minutes late to a 30-minute meeting.



Shorter Can Be More Productive: This seems counterintuitive at first but once people understand that the meetings are all about decisions and not wasting time, you will be amazed at the amount of productivity your team will squeeze into 30 minutes.



Try Mini Meetings!! Make meetings more efficient!!

Invite the appropriate attendees



Invite someone to your meeting when:

- They are a **decision maker**
- They have **vital expertise** to contribute
- The conversation is bigger than a quick email or IM
- The outcome impacts them

Who should you skip inviting to a meeting?

- The silent observer: If you have folks who just sit in the meeting and contribute little or nothing, it might be time to remove the meeting from their calendar.
- The negatron: When you have someone who's integral to the team, but repeatedly shoots down new ideas, it can really kill a meeting.
- The celebrity: When an attendee is both well-respected and has strong opinions they love to share, they can dominate a meeting (usually without intending to). Ask them to be the designated "devil's advocate," which shifts them into listening mode and creates space for others to contribute.

Additionally, keep the following in mind:

1. **Choose the right personalities:** Separate your possible attendees into three categories: thinkers, doers and speakers. In the best-case scenario all three categories are strongly represented in the meeting.
2. **Don't double up on skills and insight:** You want a variety of perspectives and technical skills to add as much value to the meeting as possible. Keep track of each attendee and the function or expertise they represent with a "people-map"
3. **Meeting Minutes:** Send minutes to anyone that wants to receive them. Make the minutes so good that people can substitute them for attending the meeting.



Prepare for **decision-making** meetings

1

What outcome will be accomplished by making this decision

2

The criteria used to make the decision

3

Identify and choose between options

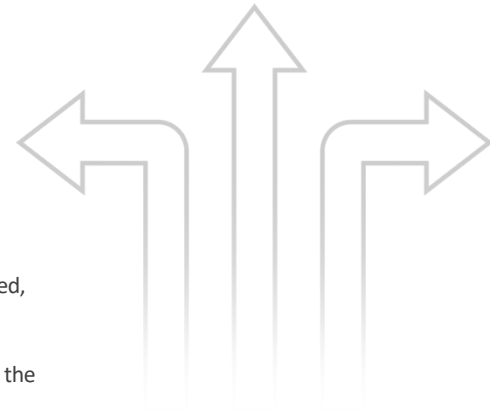
It's easy to let these conversations get intertwined, which grinds meetings to a halt. If you anticipate that it could be an uphill struggle to lead a group to a decision, work with people one-on-one beforehand, then call the meeting to let the group share and own the decision that's been made.

This will streamline the meeting-time discussion and helps you arrive at quicker decisions.

Here's how you can make it happen:

- Chat with each team member before the meeting. Get them geared up on their thinking/ideas. Identify potential aspects which must be discussed during the meeting.
- Each person will either reinforce the purpose, criteria, and options, or will add new ones.
- You're prepared if the team disagrees in places. Start by highlighting where we agree, then work on closing gaps on purpose. Once aligned, evaluate and arrive at a decision.

With a bit of prep-work, you get the further bonus of collecting all the criteria and options the group might suggest person-by-person, without the interpersonal tensions that can prevent people from speaking up in a group.



Start meetings on time

When meetings start on time, they are more likely to finish on time. They are also usually more productive. Defend your meeting time and respect your attendees' time, as well. Make sure the 9AM meeting actually starts at 9AM.

Many employees have back-to-back meetings. Once a meeting goes long, this typically starts a chain reaction of that employee arriving late to several downstream meetings, making these meetings less useful for all involved. Accordingly, most hour-long meetings start up to 15 minutes late. This delay costs attendees an average 45 minutes a day in lost productivity.

With back-to-back meetings, employees can't be on time for a second or third meeting if the previous meeting ran the full time. This meant starting late and ending late, creating a domino effect of wasted time. Worse still, each hour-long meeting really had only about 45 minutes of usable time, which was enough.

Try these two tips help solve the problem:

- **Meet for 45 minutes instead of an hour.** Since the actual work of most hour-long meetings can be completed in 45 minutes, use the extra 15 minutes to transition from one meeting to the next and start each meeting on time.
- **Start meetings at quarter past the hour.** A meeting that starts at 2:15, for example, gives attendees coming from a meeting that ended at 2:00 time to arrive on time. When others apply this strategy, you'll defeat the domino effect.



Build and stick to a strong agenda

An effective agenda sets clear expectations for what needs to occur before and during a meeting. It helps team members prepare, allocate time wisely, quickly gets everyone on the same topic, and identifies when the discussion is complete. Here are some tips for designing an effective agenda for your next meeting:

1

Seek input from team members: Ask team members to suggest agenda items along with a reason why each item needs to be addressed in a team setting.

2

Select topics that affect the entire team: Team meeting time is expensive and difficult to schedule. It should mainly be used to discuss and make decisions on issues that affect the whole team

3

List agenda topics as questions the team needs to answer: A question enables team members to better prepare for the discussion and to monitor whether their own and others' comments are on track.

4

Note whether the purpose of the topic is to share information, seek input for a decision, or make a decision: It's difficult for team members to participate effectively if they don't know whether to simply listen, give their input, or be part of the decision making process.

5

Estimate a realistic amount of time for each topic: Leaders typically underestimate the amount of time needed. If there are ten people in your meeting and you have allocated ten minutes to make a decision, you have probably underestimated the time.

6

Identify who is responsible for leading each topic: Identifying this person next to the agenda item ensures that anyone who is responsible for leading part of the agenda knows it — and prepares for it.

7

End the meeting with a plus/delta: Declare the conclusion arrived at, because of the meeting or the follow-up meeting to arrive at a decision.

Minimize PowerPoint in meetings

Pre-Reads:

- You should have meeting materials delivered the day before or the night before by email. All materials should have a one-page executive summary, and the assumption should be that everyone has read at least the summary before the meeting starts.
- A quick orientation to the context and main challenges/key updates would make for a perfect beginning.



Structuring Meetings:

The chairperson (one who called for a meeting, running it) can set the tone and give a structure to the meeting. There are two wrong ways of initiating a meeting:

- A. Make it too open and making it an open-ended discussion – this may lead to distractions and tangents.
- B. Run a meeting as an authoritarian, by not letting anyone imagine solutions and explore possible avenues.
- C. Take a third approach, It is designed to focus the discussion and encourage debate. One might say, “Now this is my tentative view of the path we should take, but I could be wrong. I want you to feel free to disagree and offer alternatives.” And then you have to be willing actually to discard or modify your plan if someone comes up with a better one.

If someone comes up with a truly new idea in a meeting, embrace it enthusiastically. How many times do you hear a totally innovative idea? If you embrace new ideas, you will attract creative people to work for you because they see that you really value innovative contributions.

Closing Meetings:

- At the end of a meeting, I will always ask, “Where are we going to go from here? What are the to-do’s and who’s going to do them and when will they be delivered?” I want the meeting participants to agree on a set of deliverables and to set their own timetable. Then they will have an ownership interest in the follow up!



Keep Meeting **Participants Engaged**

5

Tips to keep your meeting participants actively participating in your meetings

Keep Meetings on Track

Have an agenda and stick to it. Bring back the quorum to the next agenda point, in case of any distraction/tangential discussion.

Keep Meetings Short

Respect your time and that of others. Plan for shorter, efficient meetings.

No Cell Phones/laptops

Either turn them off or better yet, leave them at the door. Invitees are part of the quorum for a reason, to focus and participate.

Be There or Don't Be There

If a team member is not needed or doesn't want to be part of the discussion, then by all means they should be allowed (or asked) to leave.

Smallest Table Available

Many people overlook the impact of the meeting setting. The space you choose for your meeting can make all the difference. Get a space that is just big enough for your team.

Hold attendees accountable to actions

Track follow-up actions



Assign a note-taker

This does not need to be the same person every meeting.



Make work visible

Agree upon where notes and actions will be tracked. There are many great tools to help keep track of actions and to-do lists including OneNote, Teams, Takt, or even a simple physical Kanban board in your work area. By making work visible you'll quickly identify bottlenecks and the team can identify & help overcome them.



Set Reminders

Have an agreed upon cadence that actions will be followed upon.



Hold task owners accountable

Celebrate and recognize items that are complete, and work to understand and remove barriers preventing completion of other tasks that remain open.

Gather meeting efficiency & effectiveness feedback

There are three simple ways to get feedback from your meeting participants to help you improve

Option 1: Plus / Delta – Self evaluation

Two questions form a simple continuous improvement process:

1. What did we do well?
2. What do we want to do differently for the next meeting?

Investing five or ten minutes will enable the team to improve performance, work relationships, and team member satisfaction.

Here are some questions to consider:

- How well did we allocate our time for decision making and discussion?
- How well did everyone stay on-topic?
- How effective was the process for each agenda item?

To ensure that your team follows through, review the results of the plus/delta at the beginning of the next meeting.

Option 2: Meeting auditor role

Set a designated Auditor for the meeting, who observes the meeting and shares constructive feedback.

This could be a Line Manager or any peer

Option 3: Meeting efficiency surveys

Send out a survey with questions to seek inputs from the attendees

Weigh the decisions arrived at as opposed to the time spent, considering the big picture scenario



Meetings: Walk-in vs Virtual

Meetings: **Walk-in vs Virtual**



Same but different

As a [recent article in the Harvard Business Review](#) (HBR) acknowledges, making virtual meetings work will involve several adjustments - but once these are in place, it goes on, there's no reason why remote meetings should be an ineffective way to get things done.

What are these differences? For starters, a strong guiding hand becomes even more important in a virtual setting.

“The only thing worse than a long presentation in person is a long presentation during a virtual meeting,” the article states. The manager leading the meeting should prioritize conversation between participants rather than speechifying, and should be careful to include everyone. Meeting remotely means going without the social and physical cues that set the rules for in-person meetings; in practice, this means participants in virtual meetings are more likely to talk over one another, or to not speak much at all. Calling on people to speak in turn is one way around this.

It's also important to remember that while offices are usually designed to be peaceful spaces that are conducive to concentration, our homes can be very different. Asking meeting participants to give a quick 'virtual tour' of their environment, in which they detail any possible interruptions - from housemates, children, pets or even local traffic, for example - can provide useful context and can encourage colleagues to be sensitive to each others' situations and constraints.



Virtual Meetings – Best practices



Prepare for the meeting beforehand:

- Ensure all meeting participants have the meeting invitation link and materials. Consider setting up the meeting with no moderator.
- Make sure your presentation is ready to show. Test it before you start the call.
- Create a backup communication plan in case you have trouble connecting with remote participants. A backup plan can include asking onsite participants to connect to the meeting through their laptops, using a mobile or speakerphone, and/or collaborating through an online collaboration tool (e.g., Google docs).



In the meeting:

- If you are the remote site on a video conference, seek as quiet a space as possible with no or minimal background noise.
- Arrive early to allow time to troubleshoot and resolve any potential issues with equipment.
- Ensure that everyone has their cameras on. This provides a more complete interactive experience for the meeting.

Virtual Meetings – Best practices

Communicate effectively

When you begin the meeting:



- Once all attendees are present, take a minute to conduct an audio check. Making a quick round of introductions is an effective way to do this. Introductions break the ice and ensure that everyone can hear each other properly.
- If you plan to record the meeting, notify all participants at the beginning of the meeting.

During the meeting:



- When not speaking, make sure your audio is muted. This will prevent inadvertent noises, such as coughs, rattling papers, or chair squeaks, from interrupting others.
- Tell others if you leave the video conference early.
- Do not read your slides (a.k.a. death by PowerPoint). As with any presentation, best practice for slides is to use big fonts and as few words as possible--it's up to you to explain, elaborate, and engage. (Moderate use of numbers and statistics can be beneficial--but don't go overboard.)

Virtual Meetings – Best practices



Avoid **quick movements**, which make it difficult for cameras and microphones to keep up with you. Quick movements may appear jumpy or choppy to others on the call.



Establish an understanding among participants of **when and how to interrupt**. For example, have people raise hands or otherwise signal that they want to speak.



Consider posting **pending questions via chat**.



Cross the “virtual” barriers!

Understand that virtual meetings could result in:

- less human-connect
- less spontaneity, less evolution of ideas
- less humour
- less creativity
- less body language

which also means more possibility of confusion, more misunderstanding!!

So to compensate for this – you should try to add **more human elements**



HAVE FUN



SPEAK UP



BOND WELL

*put in the extra effort to cross the “virtual” barriers and **make meetings a success!***

Addendum

Summary

- 1 To be able to optimally manage your time alongside attending meetings is deemed part of your work-efficiency
- 2 To collaborate with others in meetings and to focus on your own work are two different aspects which need to be managed skillfully
- 3 To be able to assertively say “no” to unnecessary meetings is a skill that needs to be developed by everyone
- 4 If you happen to invite a team for a meeting, you need to learn how to effectively and efficiently plan and run it
- 5 Virtual or walk-in – meetings are going to have same ground rules, but virtual means we need to put in extra effort!
- 6 When learnt well, these practices could save precious time and merit appreciation for effective time management, and in turn, result in great value creation!

Additional Resources & References:

- [Harvard Business Review: Guide to Making Every Meeting Matter](#)
- <https://uit.stanford.edu/videoconferencing/best-practices>
- <https://www.forbes.com/sites/victorlipman/2013/03/01/5-simple-steps-to-more-efficient-effective-meetings/#43b4d2b371a3>
- <https://www.weforum.org/agenda/2020/03/working-from-home-heres-how-to-run-an-effective-virtual-meeting/>