

THE NEW
INTERACTION
METHOD

HOW TO MAKE MEETINGS WORK

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J
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CHAPTER 15

How to Put It All Together: The Agenda

We can't emphasize enough: Everyone should know what to expect before coming to a meeting. You must be explicit about what's going to happen, how the meeting is going to be run, who is going to play what roles, and the answers to the rest of the issues we have raised so far. If all participants receive a detailed agenda at least a day (preferably a week) before the meeting, they will come prepared, and most of the common causes of confusion at the beginning of meetings will be avoided. Because most of the procedural questions will have been settled in advance, your meetings will be shorter and more effective.

When you are very busy and rushed, writing up an agenda for a future meeting can seem like a waste of time. It's not— to make it easier, we have designed a simple agenda form. We have found that filling out a form is quick (you can fill it in five minutes), and the form itself reminds you of things

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you might have forgotten. A standard form is easy to read at a glance, and anyone can be trained to fill it out.

Our form includes most of the critical information people should know ahead of time, but you may want to tailor it to your particular needs. If your group has a fixed membership and meets regularly, you can design and print a form that includes all the information that doesn't change from meeting to meeting. That means even less to do when you prepare your agendas.

Now let's "walk through" the agenda form and see how to fill out each item. This will also be a good way to review and concretize some of the planning issues we have been discussing.

Name of group

Most groups have a name: Cloverdale PTA, executive committee, task force of long-range planning, board of directors of Acme Widget Co., etc. If your group doesn't have a name, you might consider giving it one. A name can help build a sense of identity and importance.

Title of meeting

Most meetings have a name or description: annual budget review, weekly staff meeting, Project Alpha progress report, emergency meeting on busing, etc. Usually the title conveys the general topic of the meeting. In conversations with other group members it helps you to distinguish between different meetings that your group may be planning to hold.

Meeting called by

It's important to identify who convened the meeting, because participants will want to know who felt the meeting was necessary and whom to contact for questions, additions to the agenda, and directions to the meeting place, as well as who

Date, starting time, and place

Obviously, when and where the meeting is going to be held are essential pieces of information. Make sure to include the number or name of the meeting room. If participants are unfamiliar with the location, send along a map with directions.

Ending time

Meetings tend to drag on forever, if you let them. People begin to wander out, the meeting dribbles to an end, and everyone leaves feeling dissatisfied and annoyed at spending more time than they had anticipated. Principally, meetings so frequently run over because groups try to accomplish too much in too short a time. We discuss this problem below under "Order of agenda items." The point is to set realistic time limits and keep to them. Begin and end the meeting on time; if you finish the agenda early, end the meeting early. Participants will appreciate that you respect their time and will take meetings more seriously. In general, meetings should be from one to two and a half hours long. Shorter than that, too much time is wasted getting started and building momentum; and if people sit in their chairs for more than two and a half hours without a break, they get restless and stale.

Meeting type

We have described five basic types of meetings—problem-solving, decision-making, planning, reporting, and reacting (feedback)—and we have shown how meetings can be combinations of these types. Each type may require different roles, numbers of people, and meeting methods. You should be clear about what type of meeting you want and plan it accordingly. For example, is it a meeting to make decisions or just to share information? Let everyone know what type of meeting it is going to be so they can arrive with a common set of expectations.

Desired outcomes

It's even clearer if specific outcomes are stated. This should be done by the group as a whole at the end of the previous meeting or by whoever is convening the present meeting. If it's the first gathering of a group, everyone should participate in sharing expectations at the beginning of the meeting. Imagine in advance that the meeting has just finished and that it was successful. Ask yourself: What would success look like? What would have been accomplished? What problems solved, what decisions made? What other kinds of sharing and learning would have made the meeting successful? If everybody is explicit about their desired outcomes, unrealistic expectations can be dealt with in advance or at least before the meeting gets underway.

Background materials

If there are presentations or issues that require the participants to do homework, list the background materials that are being sent out with the agenda or that participants are expected to have and review beforehand. Be realistic: Most people aren't very conscientious about reading handouts, so keep them short. Usually they are read at the last moment, so don't send them

forms, lists of names—even box lunches. There's nothing than finding everyone settled down to a meeting and then by one dashing out to find some piece of paper left in an

Manager/chairperson, facilitator, recorder, and members

These are the four basic roles of the Interaction Method. Having to list names on the form, you will be reminded not to have forgotten to line up a facilitator or recorder, and everyone will know in advance who is supposed to be doing what. It's essential for the facilitator and recorder to be informed of roles because they have the responsibility for coming early and setting up the meeting room. If you list the names of a group of members that are expected to attend, it gives people an opportunity to get a sense of the size and flavor of the meeting and to see what interests will be represented.

Observers and resource persons

We have already defined these temporary and occasional roles. Observers and resource persons should understand and agree to their roles before the meeting, and the rest of the participants should be aware of who else is going to be attending the meeting and in what capacity.

Meeting method

Everyone should know how the meeting is going to be—what the ground rules are going to be. We have pointed out the dangers of the so-called "structureless" meeting when you want to accomplish a task. To avoid the multi-headed ant syndrome and all the other common meeting problems, you need some structure. What's it going to be? Robert's Rules of Order? The Interaction Method? Some combination of the two?

Decision-making method and final decision-maker

If decisions are going to be made, it's essential that everybody understand how they are going to be made and by whom. Will it be the final say? The group as a whole, the manager, or someone else (senior) group or individual? Don't play games with people. If group members don't have the power to make decisions, don't let them wait to find out. It will almost always backfire.

If it's a decision-making meeting, be clear about the procedures. If you are working for a win/win solution, list the decision-making method as "consensus." But be clear about the fallback, win/lose approach, if any. If the group can't reach consensus, what will happen? Will there be a vote, and if so does it take a simple or two-thirds majority to win? How will ties be broken? Or if there is no consensus, will the manager decide? Almost any procedure can work if everyone understands and agrees to it ahead of time.

Special notes

This is the place for any special communications: a plea to group members to attend the meeting, a comment about the importance of the meeting, or an announcement about some special guest.

Here is the place to list individual agenda items. Be as specific as possible. The more you can define items that involve problems, the more effectively you will be able to use the creative power of the group. Try stating them as questions (see the next chapter).

For each agenda item, list the person who is responsible for introducing the subject (that is, who is making the presentation, who is submitting the problem to the group, who is responsible for this area of concern, etc.). The person responsible for each item should figure out with the facilitator and/or manager/chairperson a good way to handle the issue. In a sense, each agenda item is like a mini-meeting. You have to decide what type of meeting to have: what you want to do and how you are going to do it—a content and process agenda. In most cases, you won't be able to give a specific problem-solving method or technique, but you do want to communicate whether you expect the group simply to listen to a report or to become involved in solving a particular problem or making a decision.

Then you should make a realistic estimate of time necessary to deal with the agenda item. After doing this a few times, you will get a feel for whether an item is likely to be a ten-minute or half-hour issue. Things always seem to take longer than you think, so it's a good idea to be generous in your time allocations. An example of a completed agenda item: "Progress report on the career development program: Do we need an extension of deadline?/Richard/presentation and decision-making/20 minutes."

Suggestion: make a first pass at listing all the agenda items, working out a process for each one and making time estimates, but not worrying about the order of agenda items. Then add up all the time allocations to see if they exceed the total amount of time set aside for the meeting. Often you will find that you have more items than available time, but it's better to discover this before rather than during the meeting. Many meetings are damned as failures because the group had unrealistic expectations: it tried to deal with fifteen items and managed to cover only ten. If it had set out to handle eight issues, and ended up with the same outcome (taking care of ten), the meeting would have been regarded as a great success. Plan your meeting to be a success, not a failure.

Now it's time to order the agenda items. Philosophies about the ordering of agendas conflict. Some people feel the most difficult and challenging item should be first so the participants can deal with it while they are fresh. Others feel it should be last to build excitement or even to tire out participants so no one will have energy left to fight about the issue. In general, we favor putting reports on action items first and then dealing with issues in order of urgency and general concern. If you don't get to cover all the items, then at least you have taken care of the most critical ones.

In actuality, meetings can get totally filled with putting out little (but immediate) organizational fires while larger, long-range issues, which are equally important to the functioning of the group, remain untouched. To counter this tendency, plan special problem-centered meetings to focus entirely on one or two larger, more complicated issues. During these meetings, all discussion of day-to-day affairs will be suspended, and the group will devote its energies to more general problems.

ordering the agenda, you should cross out the words "Order of" and write "Suggested" on the agenda form. Allocate time at the beginning of the meeting for the agenda items to be modified and given priorities by the participants themselves. This gets people to "own" the meeting and to assume responsibility for what happens.

AGENDA

NAME OF GROUP PRODUCT DIVISION DATE 3/25/78

STARTING TIME 10:00 AM

TITLE OF MEETING PROBLEM SOLVING SESSION ON COST REDUCTION ENDING TIME 11:00 AM

MEETING CALLED BY JOE PLACE ROOM 324

MEETING TYPE PROBLEM SOLVING BACKGROUND MATERIALS REPORT ON FEBRUARY PRODUCTION (L 1)

EXPECTED OUTCOMES 1. IDEAS FOR REDUCING PRODUCTION COSTS PLEASE BRING ABOVE MATERIALS

2. A PLAN FOR DETAILED ACTION STEPS

MANAGER JOE MEETING METHOD DECISION MAKING METHOD

CHAIRPERSON JOE INTERACTION METHOD CONSULTING MANAGER

FACILITATOR TOM FINAL DECISION MAKER JOE

RECORDER MARY

GROUP MEMBERS BOB ALAN MARTA BILL SPECIAL NOTES THIS IS AN IMPORTANT MEETING

PLEASE BE ON TIME

OBSERVERS NONE

RESOURCE PERSONS NONE

ORDER OF AGENDA ITEMS	PERSONS RESPONSIBLE	PROCESS	TIME ALLOCATED
1. REVIEW OF FINANCIAL SITUATION	JOE	REPORT	5 MINUTES
2. DEVELOPMENT OF COST REDUCTION APPROACHES	TOM	BRANSTORMING	20 MINUTES
3. PRIORITIZING AND ASSIGNING FEASIBILITY STUDIES	TOM	FAIRY ORDERING	20 MINUTES