



10 Golden Rules for Meetings

(Dedicated to a client who first suggested the idea of "Golden Rules for Meetings" ...)

Meeting after meeting after meeting quietly corrodes our spirits and our organizations. We are used to boring meetings, long meetings, meetings without a purpose. We are used to mediocre and downright bad meetings. We like to call them, but there are often limited benefits from attending. If our EMS services ran this way, patient outcomes would suffer.

Beyond the measurable wasted time, meetings matter. They matter because our organizations use them to make decisions, to have social interactions that create vital connections, and – most of all – they support change. Here are 10 "Golden Rules" that, when followed, can help to create more effective meetings:

1. **Avoid meetings.** Often two-way communication is enough. Meetings should not be "informational" – reading the information outside of meetings is expected. Ask yourself if you could accomplish what is needed by making one telephone call, stopping by someone's office, or sending a short email. Get rid of "regularly scheduled" meetings when their purpose ceases to exist. (Note to leaders: If you're the person calling the meetings, it may make you feel more in control or powerful, but whatever you've gained by insisting people attend, will be lost when the meeting wastes someone's time, energy, and travel budget.)
2. **Limit invitations.** Too many people have too many meetings. For each person on the invitation list, ask yourself if that person needs to attend or if they would be better served by saving their time and sending them a copy of the meeting notes. Aim for less than 10 persons in your meeting.
3. **Create and send an agenda in advance.** The agenda should include purpose, roles, and objectives along with a list of topics, including time and the nature of the discussion for each item: Decision? Stakeholder Dialogue? Activity? Survey? Action? (see illustration)
4. **Prepare and confirm.** Insure that you have the information you need for each agenda topic and the right people available to present and answer questions for each topic. Send a confirmation notice to participants and attendees.
5. **Begin and finish on time.** The clock is all powerful. Respect the time and commitment of attendees. Do not minimize the amount of time required. Do not go longer than necessary just to fill up the originally estimated time. If you get side-tracked or stuck, move the item to a different forum. If a decision is required, tell attendees before the meeting that it will go as long as needed to reach the decision. Discipline and honesty are still the best policies.
6. **Use meeting rules.** Rules give the meeting leader a way of managing reluctance to participate, handling conflict, and keeping the meeting on track. A few, simple rules will usually be sufficient:
 - Everyone's participation is welcome.
 - Foster constructive, collaborative dialogue to encourage critical thinking and discover options.

- Turn off or place on vibrate all electronic devices.
 - One conversation at a time.
7. **Stick to the agenda.** While you need to be flexible, allowing the agenda to be modified as circumstances require, sticking to the agenda keeps the meeting moving forward, accomplishing necessary tasks, and ending on time. If you reach the end of allotted time for a topic without resolution, ask, "What is the best use of our time right now?" Then assess to determine the best process for the topic and meeting.
 8. **Create a space for each participant to air their ideas, thoughts, and opinions.** In a sincere way, ask good questions that stimulate open dialogue and invite everyone to participate:
 - How would you summarize our discussion so far?
 - What do we still need to learn or know to make a decision?
 - What is missing from this picture so far? What do we need to clarify?
 - Which criteria do you consider essential to consider for this decision?
 - What would it take to reach agreement and create change on this issue?
 - What is needed to successfully communicate our decision and reasoning to others?
 9. **Finish well.** Conclude your meeting by reviewing the information delivered, decisions made, actions assigned, and items assigned to other forums. Ask for a quick "triple W" meeting assessment: What went well? What didn't go well? What should we change?
 10. **Follow up.** Within 24 to 48 hours of the meeting, send meeting notes, action items, postponed items, and further meeting or discussion forum schedules to all attendees and other stakeholders.

These "Golden Rules" sound like good ideas. Yet, we still go to ineffective meetings led by government agencies, bosses, team members, and peers. Why? We feel obligated. But if you ask the meeting organizer, they will say that they feel obligated too. The meeting is a gathering called by someone who has no choice, attended by others who have no choice.

The good news: you can choose. The meeting system can change. Act. You are too effective and competent to put up with meetings that don't work. Choose to change your own meeting behavior. Choose to make your own assessment of which meetings are worth your time, energy, and budget dollars. Change happens when each leader and manager chooses to transform themselves and their organization. The opportunity is presented. Game on.

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