People Skills: What Every Professional Should Know about Designing and Managing Meetings
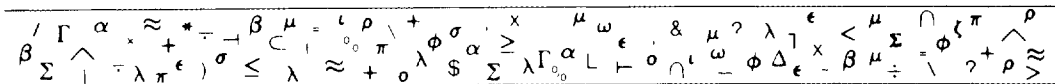
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Bob Levasseur's experience and background give him a unique perspective on one of the most important issues we face in the practice of management science: understanding and communicating with our customers. In his 20 years as a practitioner, he has been director of management sciences and then director of management education for a Fortune 50 company. Currently, he is an organization consultant, educator, writer, and speaker. He knows both the technical side of management science, where we TIMS/ORSA members are strong, and the human relations side, where we are weak. His columns address ways we can improve upon this weakness.   —Fred Murphy

Meetings. Meetings. Meetings. Why are there so many? Why are they so unproductive? Can you do anything to make them better? Before you decide that you can't, think about how it would affect your career if you could. It can be done. Professionals with good facilitation skills regularly help management teams, task forces, and other work groups to become very productive. If you want to improve your facilitation skills, read on. This column covers the essentials of designing and managing meetings.

The Anatomy of a Meeting

Groups meet to perform such tasks as sharing information, solving problems, and planning. These tasks are the content of the group's activity. Groups use a variety of formal and informal processes to perform these tasks. These processes consist of ways to work on the tasks and ways to manage teamwork. For example, two important processes are the group's problem-solving process and its decision-making process. Similarly, the group's processes for managing participation and for dealing with conflict are two important ways to manage teamwork.

A good meeting facilitator knows that sustained high productivity, the goal of

most groups, is possible only through effective teamwork. And he or she knows that a group that focuses exclusively on content can never become a team. So the facilitator provides participative processes and insists that the group learn to use them. The group must assume and share responsibility for working on its tasks and managing its teamwork using these processes to become an effective team.

Essentials of Meeting Design

A high quality design is important to the success of any meeting. Anyone can design better meetings or be a better participant if he or she follows these steps:

The first step in designing a meeting is to interview the participants to find out what results they want from the meeting and to learn how well the group is managing its tasks and teamwork. This is a very important step. Interviewing the participants provides the facilitator with important data and helps build credibility and rapport.

The second step is to create the agenda for the meeting based on the data collected from the participants. Although agendas differ, I believe that all meetings should have the same basic structure. The beginning should focus on process, the middle on content (supported by appropriate processes), and the end on process. I use the following structure.

The group leader makes his or her opening remarks. The facilitator then assumes responsibility for managing the process of the meeting with the help of the leader and eventually the other group members. Specifically, the facilitator helps the group answer five key process questions at the beginning of the meeting:

(1) What is the purpose of the meeting?

(2) What is the agenda for the meeting?

(3) What results does each participant want from the meeting?

(4) What are the roles of the facilitator and the participants in the meeting?

(5) What are the norms or guidelines for participant behavior during the meeting?

As the group discusses each question, the facilitator or an assistant records the main points on flip charts and hangs them on the walls for all to see. These charts serve as the group's short term memory. They are an essential mechanism for developing teamwork.

During the body of the meeting, the facilitator helps the group to answer four key process questions for each agenda topic:

(6) What is the specific issue (problem or opportunity)?

(7) What results does the group want from discussing the issue?

(8) What process does the group want to use to manage the discussion?

(9) How much time does the group want to spend working on the issue?

If the facilitator has designed a specific process for the group to follow, he or she manages the discussion of the topic. Otherwise, the group leader manages the discussion or delegates the responsibility to a more knowledgeable group member. In any case, the facilitator makes appropriate suggestions to keep the discussion on track and on schedule, makes sure that the meeting record is accurate, and calls for frequent, short breaks between topics.

At the end of the meeting, the facilitator helps the group to answer three key process questions:

(10) What action items result from the

meeting?

(11) When and for what purpose will the group meet again?

(12) How did the meeting go? How productive was it? How good was the teamwork?

The last question is very important. The time spent discussing how well a meeting went pays big dividends in improved teamwork and better follow-on meetings. Do not skip this step. Finally, the group leader makes appropriate closing remarks.

A good design is very important. The success of a meeting also depends on the facilitator's skill at managing group interactions.

Managing Conflicts

A person must have a high degree of self-awareness, effective interpersonal skills, and a knowledge of group dynamics to be a good facilitator. In addition to managing the agenda as described earlier, he or she must be able to help groups resolve conflicts. (An effective participant works with the facilitator to help a group deal with its conflicts.) Conflicts may arise because of (1) the stages of group development, (2) normal personality differences, or (3) the actions of difficult individuals.

Conflicts Inherent in Group Development

Even a group made up of perfectly compatible team players would have conflicts. Such conflicts result from changes in leadership that take place as a group evolves. There are three stages of group development: First, the group depends on the facilitator to provide direction (the dependent stage). Then individuals try to take the leadership away from the facilitator (the counterdependent stage). Finally, the

group's members share leadership responsibility (the interdependent stage).

The primary challenge to the facilitator in this evolutionary process comes in the second stage. The secret to dealing with counterdependence is to recognize that the group must go through it to reach its goal of shared leadership. Here is the principal strategy for managing it. First, insist that the group decide explicitly and collectively on any changes in the agenda. Second, ask the person who is challenging the group's direction, process, or progress to suggest an alternative. Third, ask the group to decide on the merits of this alternative. Finally, change the agenda or process to reflect the group's decision.

Personality Conflicts

Counterdependence typically occurs on the second day of a two-day or three-day meeting or the third day of a five-day meeting. Conflicts that occur earlier in a meeting are more likely to be due to other causes. For example, disagreements between outspoken, extroverted people and quiet, introverted people are common. Extroverts want introverts to speak up when the group is discussing a topic, not later in the meeting. Introverts want extroverts to talk less and listen more. To resolve such conflicts, the facilitator must get each side to state clearly what it wants from the other. He or she must then help the group to develop appropriate norms to guide future interactions.

Disagreements between people who like to decide quickly and those who prefer to explore all the options before deciding are also common. For example, conflict often occurs in the early stages of group development over the time spent on process and

team development. Task-oriented people see time devoted to process as largely wasted. Process-oriented people see such activity as essential. Conflict sometimes occurs in the later stages when the group's primary focus is performing its tasks. If the group doesn't spend enough time maintaining group processes and managing teamwork, process-oriented people are likely to object. To resolve either conflict, the facilitator must point out that a proper balance between process and content is essential to team effectiveness and that new teams need to spend more time on process than mature teams. In addition, the facilitator must encourage each side to say what it wants and help the group to develop appropriate norms.

Conflicts with Difficult People

It is normal for people to have questions about the agenda. It is also normal for people to be uncomfortable about the presence of a facilitator. You must expect this at the beginning of a meeting and respond with patience and tact. Reasonable people will usually suspend judgment and permit you to continue. Occasionally someone will not.

Your goal as facilitator is to show people how to work cooperatively to improve their group's productivity. This presents a problem to uncooperative people. For example, how do compulsive competitors react to the idea of a participative environment? What do people resort to when their real purpose is to defend their organization's positions against all challengers? What do controlling managers do when they have more to lose than to gain if the group succeeds? They attack. They try to keep the group from forming by discredit-

ing the facilitator or polarizing the group. To resolve this type of conflict, you must distinguish it from the conflicts described earlier. They are predictable and manageable obstacles in the path of group development. The infrequent conflicts caused by uncooperative individuals are much more serious and difficult to resolve.

I recommend a three-step approach in dealing with an uncooperative person. First, try not to personalize the attack. Second, go public to try to get the group to deal with the problem. Ask the group members if they agree with the criticism and if it is constructive or destructive. Ask them whether this has happened before and what impact it has had on their ability to work as a team. Ask what they intend to do about it now. Third, if they agree to create and abide by norms to deal with the behavior, proceed. If the same individual continues to violate the norms, ask the group to consider sanctions. If the group refuses to act, ask the leader to deal with the situation. At the next break, meet with the leader to discuss the problem and, if necessary, to renegotiate your role in the meeting.

As you can imagine, identifying and managing conflicts is sometimes difficult. However, it is critical to the success of a meeting.

Conclusion

If knowledge is power, you have it now. You understand the importance of participative processes. You know the essentials of meeting design, and you know how to manage common meeting conflicts. These techniques really work. You can use them to run powerful, productive meetings. I encourage you to do it.