Efficient & Effective Meetings

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Session Goals
- Discuss what makes meetings effective
- Describe OSCAR approach for conducting successful meetings
- Practice consensus-building techniques
- Review different meeting types
- Discuss meeting roles

My Favorite Meeting
Meetings, a Necessary Evil

- Does the meeting serve a necessary business purpose?
- Does the topic require interaction?
- Is there a problem to be solved or information that needs to be communicated?
- Is the meeting for training purposes?

Meeting Types

- Stand up/ Daily Check-in
- Walkie-talkies
- Seated/ Weekly Tactical
- Monthly Strategic
- Ad-hoc Strategic
- Retreats/ Quarterly Off-site Reviews
- Webex (other format types?)
- Others?

Daily Check-In

- Share daily schedules and activities
- Limit to 5 minutes total (not per person)
- Don't sit down
- Don't cancel if people are on vacation or away
- Can be formal or informal
Weekly Tactical

- The Lightening Round
  - Briefly share 2-3 priorities for the week per person
  - Review progress, routine sharing of metrics
  - Build agenda in real time
    - Based on what everyone is working on
    - Postpone strategic discussions (may need to get consensus on strategic topics)
    - Consider how real-time agendas work for your team

Monthly Strategic

- Discuss items identified during weekly tactical
- Analyze
  - Brainstorm
  - Decide upon critical issues affecting long-term success
  - Limit to 1-2 topics
  - Include ad-hoc meetings as needed

Quarterly

- Review strategy
- Review industry trends (or new issues/policies)
  - Position descriptions, office matrix
  - Team development
  - External facilitator
OSCAR

Organize

- DECIDE ON THE:
  - Who
  - What
  - When
  - Where
  - Why
  - How

What’s on the Agenda?
Beware

- With a smile
- On time
- With the right tone
- At the beginning

Start the meeting

- Rapport
- Participation
- Engagement
Participation Tools

- Tools to generate ideas
- Tools to evaluate options
- Tools to gain consensus

Accelerate

- Clarify who is responsible for what
- Elect a timekeeper or team leader
- Handle distractions
  - Lack of preparation
  - Individuals talking over others
  - Aggressive behaviors
  - Disengagement

Reflect on Meeting Effectiveness