FACULTY ARTICLE

Meeting Doctor process

The Meeting Doctor (MD) aims to address key issues that occur during meetings either from a relationship, management, task, and/or process perspective. It's purpose is to provide prescriptions on how to improve meeting effectiveness with the understanding that there are other, equally good prescriptions available.

By Michael Goldman, M.H.Sc.

Dear MD:

I've been reading your ideas on setting up "process" before getting into the content of a discussion, yet I'm finding little information to concretely guide me on how to do a plan for this. A facilitator we had recently, referred to his written notes for structuring our conversations, as "process notes." Is this what you call it? If so, any tips for how to put them together?

Signed,

Process Challenged

Dear Challenged:

Most of the books available on meetings do not mention process notes largely because:

- these books are geared toward meetings that will be chaired rather than facilitated
- the concept of process is not seen as an important element to meeting management
- process is somewhat understood, but remains elusive to the writer

As I've stated in past articles (eg. Issue Jan/Feb 2000 ,"A clear purpose is the key to successful team meetings") the term process refers to how a meeting is structured. This includes the sequence of steps we put into place to help a group logically move their conversation along to some desired outcome such as:

- a final decision or recommendation
- a problem identified and/or resolved
- a new strategic direction devised
- greater clarity

Thus, when a meeting is facilitated, there must be notes that provide process details for each agenda item. These notes specify for each agenda item the following activities:

1. **Defining and seeking ratification for the purpose and process**
2. **Detailed steps (sub-steps):**
   a) Taking into consideration the tools and techniques that will be used
   b) Outlining how information from the group will be solicited
   c) Prioritizing the steps according to specific criteria (eg. logical sequence)
   d) Assigning times
3. **Contingencies for What if? scenarios**

1. Defining

Defining and seeking ratification for the purpose and process

To start any discussion, particularly those that consist of decision-making or problem-solving, it's beneficial that not only the purpose for the discussion be clearly stated and ratified (eg. "Do we all understand and agree?"), but the process as well. In this way, we have better informed consumers of our service who are more aware of our process and are better able to help us manage the steps and maintain on-topic responses. Moreover, the more the group understands process, the more likely they are to assist us in improving our techniques to better meet their needs.

2. Detailed steps

Detailed steps (sub-steps):

a) Taking into consideration the tools and techniques that will be used

Some tools and techniques are straight-forward (i.e. brainstorming, force-field analysis, majority voting, delegation) whereas others can be quite complex due to multiple steps (i.e. systematic problem-solving, prioritizing, consensus building, etc.). It's always important to critically think out a process tool/method to a fairly good level of detail and describe this in your process notes.

and structure

b) Outlining how information from the group will be solicited

This typically details how we will motivate the group to participate and provide ideas. Different questions to consider are:

- What is the outcome, and how am I going to help the group get there?
- Will I need to impose structure (eg. round-robin), or just let people speak spontaneously or at their discretion?
- Should people be participating as a whole group or should I sub-group them (i.e. triads, pairs, etc.)?
- If sub-grouping occurs, will a full group debrief be required?
- Will I facilitate only, or use a co-facilitator or multiple facilitators (for multiple sub-groups)?
- What will be the method of documentation (i.e. on flipchart, post-it notes, worksheets, etc.)?
- How will I use brainstorming (i.e. free flowing? allowed to ask clarifying questions? getting people to embellish on other's ideas? merging ideas as they arise?)?

c) Prioritizing the steps according to specific criteria (eg. logical sequence)

Having determined the tools and how information needs to be facilitated, I then brainstorm all the possible activities that will be required to meet the outcome. I then go through my list of activities to put them into sequence. This can be determined by ranking each activity against some kind of criteria. The criterion I typically use is embodied in this question – what activity needs to logically occur first before I can move on to a new activity? When I use logical sequencing as my criteria what becomes evident are the gaps or activities that I missed in first brainstorm. I then include additional activities to fill these gaps.

d) Assigning times

I then review my steps, take into consideration the number of people contributing, then start to determine the amount of time required. Considering an activity that requires all participants to speak, I have a rule of thumb of allotting approximately 2-5 minutes per person depending on the complexity or depth of topic required. Another indicator for timing is the degree to which people have a vested, emotional interest in the discussion. In my experience, when people are emotional and need to vent, more time will be required to facilitate the discussion. Time allotment, therefore, necessitates pre-meeting data gathering that provides a thorough understanding as to:

- the complexity or depth of topic required
- the degree to which people have a vested, emotional interest in the discussion

3. What if?

Contingencies for What if? scenarios

Quite frequently the process does not go as you intended, or other mitigating factors come into play such as:

- not all members are in attendance
- people resist the process due to a past experience where a similar process had not worked well
- steps were unanticipated and not accounted for in the original process notes
- the group collectively feels that the agenda item and the process should be deferred for a new item where a process to manage it has not been determined
- time runs out and the full process cannot be realized

In all of the above cases, it's helpful to think of what could go wrong and have a contingency plan in your back pocket to deal with it. Nevertheless, it's impossible to anticipate all what if's and it's during these times that the following tips may be helpful:

1. **Don't get flustered! Keep breathing.**
2. **Let the group know what's going on and what the problem is. Ask for any process suggestions. You may want to have the group decide on the process, but be aware that this may infringe on their discussion time. Therefore, pick the one you like and go with it.**
3. **Ask for a break. Consult with any colleagues if possible to determine best process.**
4. **See if the change in agenda can be deferred to the next meeting in order to fully prepare for the discussion.**

Conclusion

In conclusion, remember…

Do not let the group force you in to managing a discussion which is complex and requires time to critically think of the necessary process! You have the right to defer the discussion until a valid process is determined.

__Michael Goldman__ MHSc is a professional facilitator / trainer and editor of several management books oriented to running more successful meetings. He currently is co-authoring a book about process management for new organizational leaders. To partake in a free 15 minute consultation about your meeting issues with Michael or one of his meeting professionals, please call __416.465.9494__ or e-mail him at: __goldman.dynamics@home.com.__