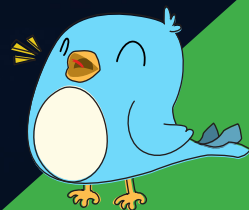


# HOW TO TAKE CHARGE AND RUN EFFECTIVE MEETINGS

By Ken Revenaugh

Proven techniques to help you avoid becoming  
a "meeting prisoner."



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## PART I

# HOW TO TAKE CHARGE AND RUN EFFECTIVE MEETINGS

Proven techniques to help you avoid  
becoming a “meeting prisoner.”

By Ken Revenaugh

**H**ave you ever felt like you were imprisoned in a meeting? Many people have. Most meetings in corporate America gather great minds around the table. The challenge is getting everyone’s ideas to surface in order to move to consensus and take action!

Millions of people are locked down in time-wasting get-togethers each and every working day. With a few simple techniques, you can take charge and change the meeting culture in your company. You can be the hero who unlocks people’s opinions, harnesses the knowledge of group thinking and creates better ideas. Here is how!

“With a few simple techniques, you can take charge... change the meeting culture...be the hero that unlocks people’s opinions.”

### **SEND OUT AN AGENDA AND READING MATERIAL BEFORE THE MEETING**

Every effective meeting begins with a strong agenda. Stay away from an agenda that simply

divulges the topics for discussion. Instead, turn the topics into questions and ask participants to think about the answers before the meeting. Another way to start critical thinking before the meeting is to send out a document for attendees to read ahead of time. Either way, the goal is to prepare everyone for a rich discussion.

There are three key meeting components (beyond the basics of who’s attending, where

you're meeting and starting time):

1. **Purpose:** Why are we getting together?  
What should we think about before we arrive?
2. **Time:** How long will we be together?
3. **Intent:** What do we intend to accomplish?

## CREATE SYSTEMS TO HELP PARTICIPANTS - AVOID MEETING HANG-UPS

Post the agenda on the screen or whiteboard for easy reference as you move through it. People are more likely to participate if they can follow the flow of the schedule. Clearly document expected outcomes. Participants will be clear regarding the deliverables and, therefore, can more easily focus their participation on the "right" track.

Put up a sheet of paper or whiteboard section labeled "Parking Lot." Explain that this will be the place to jot down ideas that need to be "parked," that is, put aside to be addressed either later in the meeting or at another time. Having a formal place to "table" discussions for later will help move the meeting along.

## ASSIGN JOBS

### *Meeting Facilitator*

Having a facilitator is very important. The facilitator's job is to watch the time, ask for focus, document ideas and ensure balanced participation. Having a specially designated facilitator takes the political pressure off the leader when forming consensus.

**"Having a facilitator is very important."**

The facilitator is also responsible for observing the meeting's process. For example, if your group is being controlled by the input of a vocal few, the facilitator can implement some of these tactics to make sure to get everyone's input:

- Only accept comments from those who have not spoken.
- Have a "go-round." Go around the room and ask every person to state an opinion on a key question – people are allowed to pass.
- Alternate between men and women, if this is possible and applicable.
- Ask if people need a break.
- Move your location if a sub-group starts to dominate.
- Break up into smaller groups and then report back to the whole.
  - Have another person keep time or take notes in a particularly difficult meeting when facilitating the personalities requires a lot of effort.
  - The facilitator may table discussions for a different time and manages the "parking lot" described above.

### *Additional Meeting Roles*

In some meetings, there may be certain facilitation tasks you want to assign to others. The roles for these tasks could be:

- **"Recorder":** Takes detailed notes of the conversations.
- **"Scribe":** Takes high-level notes on a flipchart or whiteboard in view of the entire group.
- **"Timekeeper":** For example, if brainstorming a topic is limited to 5 minutes initially, the timekeeper assures that participants follow this rule.
- **"Observer":** To be used when you

need someone to give feedback on how the group is working together. Are everyone's opinions emerging? What does participant's body language and facial expressions demonstrate?

- If someone is used to observe an entire meeting, arrange to follow up with him soon afterwards to get his insights (preferably immediately after the session).
- Also, ask your observer to offer a constructive critique of the leader's performance.

Be sure to rotate roles so that all members of your group pick up these skills. (Every year, consider holding a training session so that new members can easily learn these and other skills.)

**"An inviting climate in a meeting room...can set the stage for participation."**

## CREATE AN INVITING ENVIRONMENT

Fostering an inviting climate in a meeting room is a simple yet basic feature that can set the stage for participation, collaboration and productivity. The physical environment and how the meeting is run both set the tone. Here's a short list of things to consider for your next meeting.

- **Before the Meeting:** Arrange the seating so that everyone can see not only you and each other, but also the front of the room. Try to set up the room ahead of time so you are available to greet participants as they arrive. Make sure papers are handed out before the clock starts.
- **Beginning the Meeting:** Open with an introduction to set the stage and include your own expectations for a successful

meeting. Set ground rules or operating agreements to guide the meeting. State that the meeting will run based on the defined agenda and follow your own guidelines!

- **During the Meeting:** In large group meetings, encourage as much diversity of opinion as possible by openly valuing different points of view (see below – Trust in Group Wisdom and Stay Neutral). The leader sets the tone by making it acceptable to express an unpopular opinion. Note the importance of encouraging many creative minds to work together. If things get too personal or offensive, intervene by calling on people by name to ask for focus. Everyone will appreciate the gesture.

## TRUST IN GROUP WISDOM AND STAY NEUTRAL

As a facilitator, your role is to be neutral about the content of the discussion. A good facilitator believes each group possesses wisdom to find answers. The facilitator's role is to help uncover the group's wisdom. This belief in group wisdom is precisely what distinguishes skilled meeting facilitators from meeting leaders.

If you have opinions about what is being discussed, keep them to yourself. Check to see that you are not influencing the process to get the outcome you prefer!

Five ways to show your trust in group wisdom and maintain neutrality:

1. **Treat All Equally.** Acknowledge all contributions similarly. Avoid saying "good idea" to some participants and not to all.
2. **Avoid Alignment.** Do not give the group the impression that you have a closer relationship or you're in more agreement with specific group members.



3. **Stay on Topic.** When the group veers off topic, tell them. Check to see if the group agrees with you, and then ask what, if anything, they want to do about it.
4. **Involve Participants.** Focus on engaging participation, rather than evaluating the quality of the ideas being generated.
5. **Stand Strong.** In the face of conflict within the group, maintain neutrality and avoid judging any person or idea in conflict. Participants need to know that you are listening and not taking sides.

**“Trust in group wisdom,  
maintain neutrality.”**

## CREATE MOMENTUM AND KEEP IT GOING

Involve attendees in the meeting process, which creates momentum. Use this momentum to increase the information available for quality decision making. Ultimately, involvement will increase attendees' investment in meeting outcomes.

Try some of these ideas at your next meeting:

- Ask participants to describe their expectations at the beginning of the meeting and let them know if the posted agenda is likely to meet their expectations. This also helps other participants learn one another's desired outcomes, which helps move the meeting along.
- If needed, solicit input from those who may not have been vocal in the meeting by asking, “Is there anyone who would like to comment from whom we have not yet heard?” More introverted participants may welcome an invitation and find it easier to engage in dialogue with active extroverts.

- Periodically conduct process checks by asking, “Are we on the right track?” A course correction may increase participation dramatically!
- Acknowledge all comments and avoid evaluating participant ideas. Leave that job to other participants. (Remember, the more neutral you are, the more comfortable it will be for everyone to participate without concern that you will judge his or her comments.)
- Clarify action items and assign follow-up tasks. Ensure participation after the meeting, too!

## ASK OPEN-ENDED QUESTIONS

Be prepared to ask open-ended questions that uncover various perspectives, stimulate thinking and help move people toward action. These are questions that cannot be answered with a “yes” or “no” and often start with the words “what” or “how.”

- What do the rest of you think?
- How do others feel?
- How can we move forward?
- What led you to that conclusion?
- What haven't we considered yet?
- How does this fit into our bigger plans?
- What would happen if we implemented this plan?
- Who would be responsible for that?
- Would you elaborate on that point?
- Could you tell us how we could make that work?

**“Ask open-ended questions.”**

## AVOID WORKGROUP PITFALLS

Groups can be extremely effective in solving problems or disintegrate into an unwieldy team without focus.

Among the pitfalls to avoid in workgroups include:

- Power jockeying.
- Being stalled or dominated by a coercive individual.
- Suffering groupthink (when the group as a whole acts less capable than any individual participants).
- The Abilene Paradox (when a group commits to a direction that none of the members would choose as individuals).

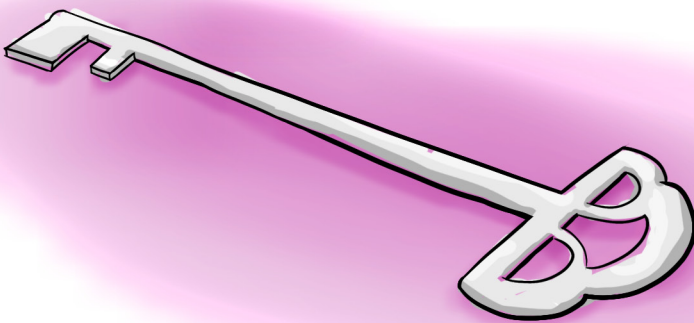
By employing tools to build consensus (described below and in Part II), you can prevent workgroup pitfalls from hijacking your meetings.

**"Perhaps the most common hazard for teams is a lack of consensus."**

## BUILD CONSENSUS

Perhaps the most common hazard for teams is a lack of consensus. It is a particularly thorny problem, and brings a lot of teams to heated arguments, division and disaster.

The word consensus comes to us from Latin roots meaning "shared thought." Consensus does not imply complete agreement, but does involve seeking a decision with which everyone is reasonably comfortable. To accomplish this, everyone will need a fair opportunity to be heard, and the group should explore latent issues to their satisfaction.



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## PART II

# HOW TO TAKE CHARGE AND RUN EFFECTIVE MEETINGS

Consensus building tools to help you get through meeting impasses or inaction.

By Ken Revenaugh

**D**on't let your meeting get bogged down due to an impasse or sudden lack of attendee action. This section details ideas to help you retain and combine members' best contributions and maximize results.

### FIVE IMPORTANT CONSENSUS-BUILDING TOOLS

#### 1. *Structured Discussion and Visual Representation*

Structured discussions (where a note taker is employed) and highly visual meeting documentation can put the group on the road to consensual decision making.

- As you lead a structured conversation, it is important to capture the ideas and thoughts of the audience in the front of the room. Consider using a whiteboard or flipcharts. I have also seen each idea captured on

Post-it® notes and put on the wall. Then ideas can be grouped into like items before the narrowing exercise begins.

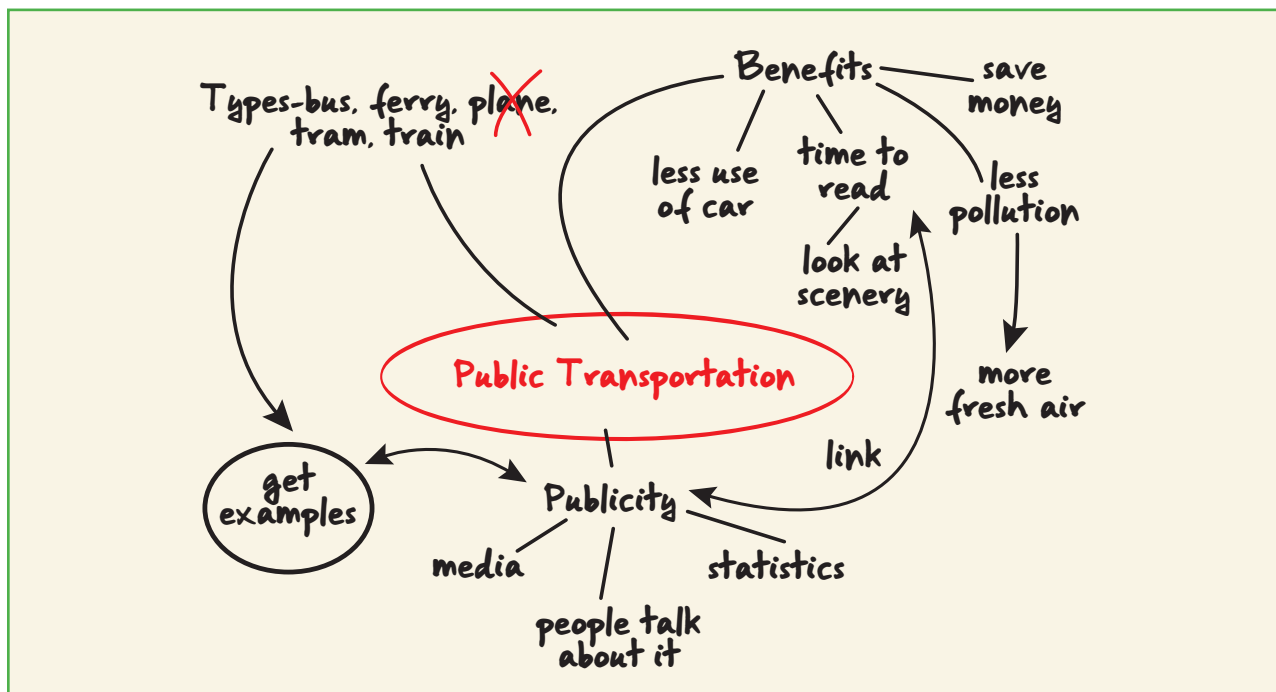
- If you have an audience that is highly visual, you may want to ask someone to take notes in a visual format known as Graphic Facilitation or Graphic Recording. While this often requires hiring a consultant with this skill, it can be very useful in the right situation.

Consider employing Steph Crowley at [www.TheChrysalisSolution.com](http://www.TheChrysalisSolution.com). When people come together to talk, think, collaborate and strategize, she captures the group wisdom and information in real time in a tangible form on large-scale murals. As the meeting unfolds, she captures all key ideas; presentations and comments quickly and accurately LIVE in a very visual format using text, illustrations and layout. No idea is left behind!

The results are large murals designed to bring an exciting and distinctive visual component to meetings. Attention to the visual aspects of a group event can be the difference between “just another meeting...as usual” and having the kind of event that becomes the standard by which others are measured for its energy, participation, outcomes and follow through!

Here is a sample of a mind map:

How do you mind map? Start with a clean sheet of paper. Write your subject or central idea in the middle of a blank page. Then, write down the group’s ideas. Don’t be afraid to fill the page. Neatness doesn’t count. Initially, there are no bad ideas. What is important is to have a one-page idea conglomeration. If possible, put related ideas near each other on the page and draw a circle around related idea groups. If several idea groups interact, let the circles overlap or draw lines between those ideas.



- If you don’t have the budget, or need, for a highly skilled graphic facilitator to illustrate your brainstorming, maybe Tony Buzon’s process is right for you. In the late 1960s, Buzon (editor of the *International Mensa Journal*, a publication for people with genius IQs) came up with the concept of mind mapping as a way to harness the potential of the whole brain. Mind mapping can help you generate ideas while your brain is in a highly creative mode of thought.

## 2. Multi-Voting

Multi-voting is a great method for applying majority rule to decision making in an evolving/ consensus environment. If you have a long list of items to whittle down to a few contenders, multi-voting is one of the best tools to use. In a multi-vote, each voter picks a set number (often a third or half of the total number of choices) of items from the pool. The items the most voters pick stay on the active list; the others drop out. Multi-voting helps quickly prioritize many ideas.



### Here's how it works:

- Count and number ideas to be considered on a shared display (e.g., a laptop with projector or poster paper).
- Make sure each team member understands every idea on the list. This step is for clarification only, not critical discussion. If something is unclear, ask the idea's contributor to clarify.
- Assign participants a sufficient number of votes to enable them to vote for a certain number of their highest priority ideas.
- Distribute colored markers to all participants and ask them to place one mark next to each idea to signify their vote.
- Count the votes for each item and prioritize the top contenders in order of the number of votes received.
- Never multi-vote down to only one item. One item constitutes a false consensus.

**NOTE:** Decide and be clear as to whether people can “stack” their votes on items (give items of top priority more than one vote) or whether they need to use each vote for a separate item. Then invite everyone to mark his or her top choices. Once the votes are tallied, be very clear about what will happen next. For example:

- Will a planning committee receive the items listed in order of priority?
- Will only ideas that received the most votes be presented?
- Will ideas that received “X” number of votes or more be presented?

### 3. Rating Scales

Rating scales, in which each item is rated on a scale from 1 to 5, or 1 to 6, or even as much as 1 to 10, tend to be more accurate than a scale of 1 to 3.

- Wider scales encourage gaming, and may allow extremist votes to distort group decisions.

- Very narrow scales may not allow enough scope for voters to express their real judgments. However, somewhat narrower scales that dampen extremes of opinion are often most useful.
- Voting is not intended to result in a final decision, but rather to structure discussion and thought.

It is often useful to figure out what criteria are most important to the final decision, and then to rate each option with respect to each criterion.

- For example, you could rate three different cars with respect to price, safety, cargo capacity, performance and styling.
- To make this method even more powerful, each criterion can be rated, thus weighting the item ratings each voter makes.

### 4. The Pick 3/Drop 3 Technique

Pick 3/Drop 3 is another tool to help narrow down a long list of ideas. Group members shorten their brainstormed list by identifying both the highest and lowest priorities among the ideas. This method accommodates two styles of decision makers: some people find it easier to identify what should come off the list, while others are more comfortable identifying what to keep.

Assume you've already brainstormed a list of ideas. Now what?

- Ask each person to review the list and select the three items he or she would keep on the list. They put a “P” by their three “picks.”
- Next, ask each member of the group to select three items that are least important to keep on the list. Ask them to put a “D” by these “drops.”
- Remind participants that it is okay if they all end up with both P's and D's on any given item.

- Review the list with the group. Hopefully, they agree that the items with the most D's can be taken off the list. Circle the items that have the most P's.

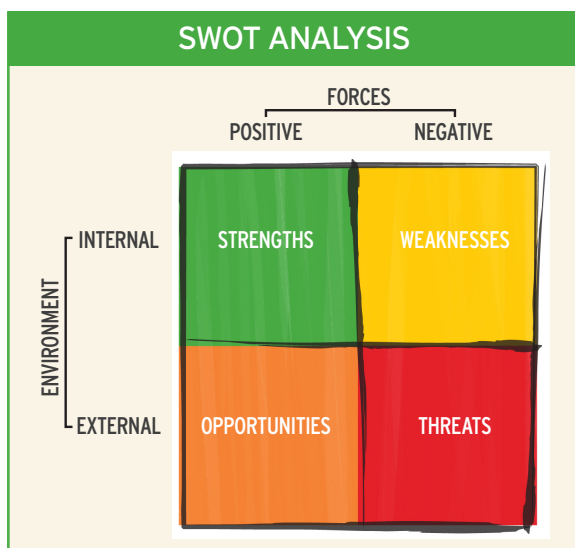
At this point, there may be clear agreement or not. Have the group repeat the process with the new list until you get to the desired number. Once the list is narrowed down sufficiently, identify items with the largest number of positive votes.

## 5. SWOT Analysis

SWOT is an acronym that stands for Strengths, Weaknesses, Opportunities and Threats operating in a given situation. It's useful in strategic planning to map the match between a group's internal and external environments.

**To use SWOT, follow this three-step process:**

1. Draw a large 2 x 2 matrix. Label the vertical axis Environment (internal, external) and the horizontal axis Forces (positive, negative). Label cells appropriately as strengths, weaknesses, opportunities or threats.
2. Elicit participants' ideas and post them in appropriate cells.
3. Study and discuss relationships between ideas for clues to planning direction.



The bottom line in consensus building methods is this: Structure the conversation and use proven processes to reduce a list to a manageable size, not to make a decision directly; then discuss to elicit members' opinions and to gain insight. Voting or rating methods should not be the final step in attaining consensus. Rather, these methods will focus the group on a course of action and offer everyone a chance to consider and assent to pursuing it.

## FOUR WAYS MEETINGS GO OFF-TOPIC (AND WHAT TO DO ABOUT IT)

Meetings don't actually go off-topic; people do. It usually takes at least two people going adrift to take a meeting off course. You can help head off or rectify this by carefully tracking the way conversations are progressing (or not progressing). Disruptions to a meeting's progress basically come from two sources: individual behaviors or whole-group situations.

### 1. Topic Drift

Any topic can attract comments irrelevant to the meeting agenda or objective. Juicy as they are, such comments seduce one or more participants. If pursued... well, you've been there...conversation diverges farther. Topic drift (sometimes called "being in the weeds") can be more fun and interesting than the meeting's objective. However, it should only be briefly tolerated if the group is to achieve its original purpose.

**What to do.** When participants have been seriously diverted, say: "This discussion appears to be veering into areas outside the scope of this meeting. Can we table it or do we need to add it to the agenda?" For a minor diversion, treat the occurrence lightly: "OK, let's come back and focus on the problem we need to solve..." Or say, "We've explored the topic, so is there anything else?"

**Great leader tips.** When you suspect a conversation has abandoned the objective or agenda of the meeting, verify your assessment

## Four Ways Meetings Go Off-Topic

- Topic Drift
- Breaking Time Agreements
- Sub-Group Off-Focus
- Whole Group Off-Focus

by calling for a clarity check (sometimes called a process check). Get the group's attention and then say: "Excuse me, I'm not clear that this conversation is on-topic, I'd like to check to see if it's important to pursue now." If it's not important, other participants will confirm your assessment and those engaged in the conversation can continue off-line.

### 2. Breaking Time Agreements

Time agreements are typically broken in two ways:

- Start and end times of the meeting aren't honored.
- Actual versus budgeted time for a given agenda item isn't honored.

Both problems can prevent the meeting from reaching its objective and frustrate participants.

**What to do.** Call for the meeting to move ahead by using any of the following:

- "I notice that we haven't kept to our stated start and end times, which causes a bind for us. Could we make a new agreement that reflects our true intentions and practice?"
- "Are we all ready to make a decision on this?"
- "What needs to be done on this before we can move ahead?"
- "Let's check and see where everyone stands on this."

Be sure to announce when agenda items run over the budgeted time: "We have spent more time on this item than intended. What does the group want to do?" (Of course, if you assign more time, you'll need to reallocate the entire meeting's time budget at this point.)

### 3. Sub-Group Goes Off-Focus

Often, agenda items spawn dialogue among the members of a small group, who have important views to share with each other. However, when other attendees have no interest in the conversation, they become bystanders at their own meeting.

**What to do.** Make the spontaneous breakout session public by saying: "This discussion appears to involve only a few people. Is it something that can be resolved rapidly or is there another way to handle this? What does the group want to do?"

### 4. Whole Group Goes Off-Focus

**What to do.** Follow a four-step intervention process:

1. Observe what is going on: For example, almost everyone seems angry and opinionated.
2. Get the group's attention and state your observation without judgment: "There seem to be a lot of feelings about this subject, and many people who want to speak."
3. Gain agreement on your perception: "Am I correct?" Look for head nods. If people disagree with your summary, listen to their points of view and try again to summarize.
4. Move on by suggesting how to address the situation in a way that is consistent with the agenda and the needs of the group: "I'd like to suggest that we break down into groups of three so everyone has a chance to express their thoughts. Your task is to create an agreed-upon list of your concerns. Then we'll go over these lists in the large group."



Following the four-step process can help bring the group back to its focus and give it some direction and movement forward. Sometimes just the mention of this process, if done at a previous time, will re-focus the group all by itself.

### **THROW OUT THE RULES, KEEP IT ORDERLY, MAKE IT FUN**

Everyone has gone to a meeting that starts with a bunch of rules. It can really deflate attendees, making them feel as though they've entered the box of bureaucracy. Really, rules are only meant to keep the meeting on track and match the discussion with the meeting's goals and objectives.

*Here is a fun way to make that happen – give each attendee three cards:*

1. **TA:** Tangent (I don't think that discussion is relevant. We should move on and/or put this in the "Parking Lot.")
2. **DH:** Dead Horse (I think we have talked about that enough, let's move on.)
3. **SD:** Slow Down (I think we need to spend more time on that topic.)

At any point, a participant can raise a card to express an opinion. If the group agrees – and often they do by quickly raising their cards or calling out the card's name – the facilitator can take action and keep the group on task. If the decision is to move on, the topic is often moved to the "Parking Lot" (listed for discussion another time). If the decision is to slow down, the group spends more time on that topic.

**"Under the right conditions, large groups can make rapid decisions."**

### **REACHING CONSENSUS**

Some people believe that the only way to make decisions rapidly in an organization is to resort to the "chain of command." The myth is that the greater the number of people, the slower the decision-making process. As logical as that may seem, there's evidence that it's not necessarily true. Given the right conditions, large groups can reach consensus rapidly, too. The key is whether or not the decision-making environment is politically charged and whether the leader stands for a clear and shared mission.

Here are some conditions under which large groups can make decisions rapidly:

- **Clear focus on moving forward together**  
The key to rapid consensus among any size group is a clear imperative to move forward together. In other words, it's in everyone's interest to resolve differences rapidly and take the next step collectively. Thus, any one person's veto carries with it a clear responsibility to figure out how to move the group forward.
- **More people in the room**  
Believe it or not, evidence suggests that larger groups make decisions more rapidly

than small groups. The key is to gather all the stakeholders in the room and let them know that you expect them (1) to each be heard, and (2) to make a decision to move forward together.

- **Consider more alternatives**

Generating and considering more alternatives is often faster than considering only a few. When groups are faced with only a few alternatives, they tend to engage in a painstaking analysis and suffer “analysis paralysis.” With many alternatives to consider, the comparison helps shape the group’s preferences. It’s also easier to be clearer about contingency choices when selecting among many, rather than few, choices.

- **Integrate with more parts of the organization**

Thinking systemically about how a decision affects other departments, divisions and functions can, over time, help move the entire organization forward efficiently and quickly. Think about it. If every department were making decisions by thinking about the impact on other departments, there would be more communication, information sharing, trust and alignment between departments. Greater information sharing and alignment can lead to faster decisions.

- **Rely on wisdom**

When “pushing the envelope,” it’s helpful to have some “gray hairs” in the room who have been envelope pushers in the past. Use them. While they may carry no specific knowledge about the present situation, they do know plenty about moving forward without certainty because they have been there before – perhaps dozens of times. Their intuition is finely tuned; they know what people are feeling, and they often know just how to reach the essence of an issue to help group members confidently commit. The group will appreciate their expertise.

- **Consensus via the leader as a time-breaker**

Groups that make consensus decisions rapidly do so under time pressure. The leader gives an incentive to make a decision by explaining

that, if the group does not reach consensus, he/she will make the call. A good leader knows how to suspend an issue, allowing the group to decide, while also letting the group know that if they don’t come to a decision, the leader will.

## CLOSE YOUR MEETING COMPETENTLY AND PROFESSIONALLY

You may have designed, planned and facilitated the meeting well. But if you do not close confidently and professionally, you may not achieve your desired outcomes.

### What to do:

- **Summarize:** Be sure to summarize main points, decisions, actions and assignments.
- **Acknowledge:** Thank participants in general. Specifically, thank those with special responsibilities for the meeting and those assigned to tasks.
- **Timing:** End on time to let participants know you respect their time, to encourage participants to work efficiently in the agreed-upon time frame and to minimize frustration!
- **Document:** Make every effort to quickly obtain the meeting minutes and/or meeting results and decisions and report them to all attendees as quickly as possible.

“Close your meeting competently and professionally.”

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