

# Meeting Management Tips: Strategies for Improving Your Skills

by Jean M. Holcomb

*Professional Perspectives—Tools and Techniques of the Trade.* The Professional Development Committee encourages members to continue to explore topics after presentations at the local, regional, and national levels. We welcome your comments and article suggestions. Please contact Carol Avery Nicholson at 919/962-1199 or carol\_nicholson@unc.edu.

**Why should law librarians care about developing meeting management competencies?** As law librarians, we spend a significant part of our working lifetime in meetings. As library organizational charts become less hierarchical, the trend toward a team-based approach to decision making and problem solving brings with it an exponential increase in opportunities for meetings. Government, corporate, and educational institutions that practice team-based management now involve the law library staff members in meetings whose focus may be on activities of the parent organization. Mastering strong meeting management competencies positions the law librarian strategically to further the goals of the library as well as those of the project team.

Our institutions and organizations deploy resources to underwrite the meeting processes required to keep complex entities functioning and growing. With the increased organizational support for the meeting process comes a heightened focus on results. No organization can afford to tolerate a Dilbertesque corporate meeting culture.

Law librarians have many formal and informal training opportunities for acquiring new competencies in a wide range of emerging technology applications, but not for developing superior meeting management skills.

Though competencies for librarianship now routinely delineate technical skills, the art of meeting management will not appear on such a competency check list. It should. As more and more decisions that impact the library's ability to provide service are made outside the law library's walls, a law librarian's stake in perfecting strong meeting management skills has grown.

**How do you know when it's time to brush up on your meeting management**

competencies? Look back over the last meetings you've attended. Ask yourself the following questions. Did the meeting start on time? Did key people arrive late or fail to arrive at all? Did the participants receive the agenda far enough ahead of the meeting to have adequate time to prepare? Did the attendees have a clear understanding of the purpose and goals of the meeting? Did the group's discussion stay on track? Did all who attended participate in the discussion? Did individual participants stay focused throughout the meeting? Did time run out before the meeting goal had been reached? Did those who attended leave without an assignment? Did you feel satisfied that the result justified the time and effort spent?

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If you've experienced symptoms of meeting management malaise in a meeting in the last six months, it might be time to focus on developing new tools. Since both those who lead a meeting and those who attend share responsibility for its outcome, it's equally important for all parties to strive to improve the complementary skills necessary for success.

**How can meeting management skills be enhanced?** A variety of options exist for students of meeting management strategy. Because organizations now place great value on the meeting process as a problem-solving and strategizing tool, internal training departments often offer employees opportunities to develop new skills in facilitating effective meetings. Corporate-sponsored day or multi-day classes focus on key elements such as

methods to manage the group process, to present information effectively, to clarify team purpose, and to facilitate group decisions. Many organizations provide their in-house training programs at no or low cost.

Outside the parent organization, the wider community provides a range of informal training options. Public cable television channels offer examples of meetings at virtually any hour. Your local county council meeting, a candidates' forum, or a community task force on new bus routes all give opportunities to critique the management skills of others who have years of experience in molding the group process. The community also offers opportunities for practicing meeting management skills in a variety of volunteer settings. Law library professional organizations at the local, regional, and national levels actively recruit volunteers for committee and task force assignments. These informal training options profile meetings managed with skill and flair, as well as meetings which descend into name calling and anarchy. Each presents a learning opportunity for you, as an observer or a participant in the process, to reflect on what tools work and what strategies might be improved.

Another source is the field of management literature. Sharon M. Lippincott's small paperback, *Meetings: Do's Don'ts and Donuts—The Complete Handbook for Successful Meetings* (published by Lighthouse Point Press of Pittsburgh, Pennsylvania in 1994), is a good example. Lippincott's down-to-earth approach centers around five principles: be discerning about the need for meetings; plan meetings with purpose; use meeting ground rules to maintain focus, respect and order; take personal responsibility for meeting outcomes; and finally, if your meeting isn't working, try another tool. Your neighborhood library or bookstore will be a reliable place to search for tips.

# A Desktop Learning Opportunity

## How can you create a commonsense approach to meeting management?

Developing a comfortable meeting management model becomes a very personalized process. No "one size fits all" formula exists. However, all meeting management templates share three common elements: pre-meeting planning, meeting execution, and post-meeting evaluation. Each element of the meeting management model requires a specialized focus for implementation.

During the **pre-meeting management stage**, the meeting planner must first assess the threshold decision of whether or not the meeting format will be the most appropriate way to address the issue. If a meeting must be held, the next choice will be to answer a series of questions designed to construct an appropriate meeting model. A *who, what, why, how, when* and *where* checklist helps to set meeting parameters. Such a checklist helps to identify key decision makers whose support should be enlisted. Following this review, the planner creates and distributes an agenda which targets steps to achieve the meeting's goal. Site selection, date and time calendaring, materials preparation, and refreshment planning round out the basic task list.

If reading this list gives you second thoughts about the commitment necessary to plan a successful meeting, don't be surprised. Doing meeting planning carefully is not a task to be taken lightly. It's easy to rationalize that all this preparation is unnecessary. Reading a "to do" list for the first stage of a meeting makes it easier to understand why so many participants in meeting experiences find the experience to be unproductive.

When the day for the meeting arrives, the meeting manager's focus turns to strategies centered on execution skills. The primary role now becomes one of coach and expectation manager. Here too the planner's personal template outlines the steps to be followed.

At the **execution stage**, the meeting leader sets the stage for the activity. Elements of the meeting include introductions, a review of the agenda with suggested timelines, the development of ground rules for how the group will proceed, an articulation of the purpose and goals for

the activity, and an explanation of methods which will be utilized during the course of time which has been set for the project. Often the initial invitation or assignment to participate in the meeting includes a preview of these elements to enable the participants to make an informed decision about whether to invest in the project or to decline the offer of involvement.

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Within this template for the activity, the experienced meeting coach deploys an array of personal tools to move the group process forward. Process pros pay particular attention to three areas: creation of the ground rules, clock management, and visualization of the potential potholes in the process. A meeting manager who approaches a meeting without investing time to master skills for handling each of these critical areas places accomplishment of the project goals at risk.

The need for establishing group ground rules can easily be overlooked. While the formality of *Robert's Rules of Order* may be overkill for a one-time meeting, the need to provide participants with a clear sense of how the business of the project will be conducted can't be bypassed. The initiative for setting the group meeting climate rests in the hands of the meeting leader. The group needs to be encouraged to reach consensus on a set of ground rules that determine the pattern for everything from what to do about personal telephone calls to how individual speakers will be recognized. Investment in time on this aspect at the beginning of the process pays dividends throughout the course of the activity.

All savvy meeting coaches rely on an array of clock management tools. For example, avoiding an obvious meeting start time on the hour or half hour encourages attendees to check their watches. We all have developed a sixth sense about major time blocks and believe intuitively that we know from long practice how to arrive at 9 a.m. or 1:30 p.m. Setting a start time of 8:35 a.m. and actually beginning on time encourages

promptness. A similar strategy works for establishing meeting breaks. As a rule of thumb, shorter regular breaks provide opportunity to release tension and recharge focus without interrupting the overall flow of the meeting. Try setting a standard for a seven minute break every hour and enjoy watching the group test their personal time monitoring skills. Successful clock managers also become adept at a strategy resembling a two minute drill designed to bring the group to closure on an issue. While all the attention to structure and planning sounds grim and soulless, clock management provides opportunities to lighten up and have fun with the process.

Finally, refining the skill of visualization provides the meeting coach with a forecasting tool to facilitate meeting process problem solving. Much as the star athlete reruns mental tapes of crossing the victory line, the meeting manager who sharpens the skill of seeing the meeting process as a living entity can practice problem resolution strategies in advance of the occurrence and act to intervene.

After the meeting ends, the **final stage** of the meeting process begins. The meeting manager must monitor follow-up strategies and review progress toward the goal. Equally important will be time spent reflecting on the process. Stepping back to critique what worked and what skills need improvement isn't easy. Inviting the group to evaluate the process can be a good starting point. All too soon it will be time to draft the next agenda.

Utilizing a structured meeting framework creates the opportunity to develop a personalized meeting management template that complements the individual strengths of the planner. When the meeting process itself ceases to be a hurdle, all participants will be empowered. Law librarians who invest in improving their meeting management strategies will be able to use these skills to harness the energy and goodwill generated by smoothly run meetings to promote organization plans and projects that position their libraries for success.

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