POWERFULLY SIMPLE MEETINGS WORKSHOP

PARTICIPANT GUIDE

Have you ever wanted to improve your business meetings and free up time to get important work done? Then this workshop is for you. The MeetingResult "Powerfully Simple Meetings" training program is intended to guide you to fewer, faster, more focused meetings by implementing a step-by-step meeting process, essential meeting leadership skills and tools.

TABLE OF CONTENTS

Welcome to the Powerfully Simple Meetings (PSM) workshop. Following is an outline of the participant guide materials. The participant guide is structured to match the order of the online workshop to allow you to follow along and take notes and complete self-reflections and exercises to reinforce the concepts you are learning.

PARTICIPANT GUIDE

Powerfully Simple Meetings Workshop

- **INTRODUCTION & OVERVIEW**
- MEETING CONTEXT & CHALLENGES
- POWERFULLY SIMPLE MEETINGS (PSM) PROCESS
- ESSENTIAL MEETING LEADERSHIP SKILLS
- IMPLEMENTING PSM IN YOUR ORGANIZATION
- APPENDIX

PARTICIPANT GUIDE

INTRODUCTIONS AND OVERVIEW

LECTURE # 1 - WELCOME TO POWERFULLY SIMPLE MEETINGS

SELF REFLECTION: If your last meeting was an animal or vehicle, what kind of animal or vehicle would it be and why?

____

____

LECTURE # 2 – COURSE AUTHORS / INSTRUCTORS – WHO ARE WE?

Pete Kidd **Bryan Field**

LECTURE # 3 - WORKSHOP OVERVIEW – WHAT ARE YOU GOING TO LEARN?

This course includes approximately 3.5 hours of instruction via video lectures, exercises and quizzes to learn, practice and reinforce new process, tools and skills. Whether you lead or participate in meetings, you need to know how to improve the quality and productivity of business meetings.

This workshop is designed for people who spend 10% (or more) of their time in meetings. It is ideal for groups of employees who want to develop meeting skills for effective meetings and is a valuable workshop for intact work teams. This workshop teaches you how to apply processes, skills and tools to effectively manage meetings. The outline of the workshop is presented in the table on the next page.

WORKSHOP OUTLINE

Component	Content	Estimated Time
Introductions & Overview	• Welcome and Introductions • Expectation Setting	8 minutes
Meeting Context	• Meeting Environment & Context • Three Categories of Meetings	5 minutes
The Problems with Meetings	• The Five Meetings Killers	21 minutes
Meeting Assets	• The Intellectual Property Obtained from you Meetings	22 minutes
Powerfully Simple Meeting Process	• PSM Meeting Process Overview • Meeting Planning • Meeting Execution • Meeting Reporting	36 minutes
Essential Meeting Leader Skills	• Overview of the Essential Meeting Skills • Listening • Questioning • Redirecting • Summarizing	96 minutes
Implementing PSM in your Organization	• Organize and Get Your Tools Ready • Communicate New Approach to Stakeholders • Run Your First Meeting With a Focus on the Basics • Automate Meeting Process With Technology • MeetingResult Meeting Management Software Platform Demo	21 minutes
	LECTURE TIME	3 hours, 27 mins
	ESTIMATED EXERCISE TIME	45 mins

LEARNING OBJECTIVES

After this workshop, you will be able to:

- Understand the fundamental challenges with executing productive business meetings
- Execute the step-by-step process for managing effective meetings
- Learn to quickly identify and capture your meeting intellectual property (i.e. meeting assets)
- Build your essential meeting management skills and put them into practice

YOUR EXPECTATIONS

By participating in this workshop, what other objectives do you have?

1.
2.
3.

Notes:

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Powerfully Simple Meetings Workshop

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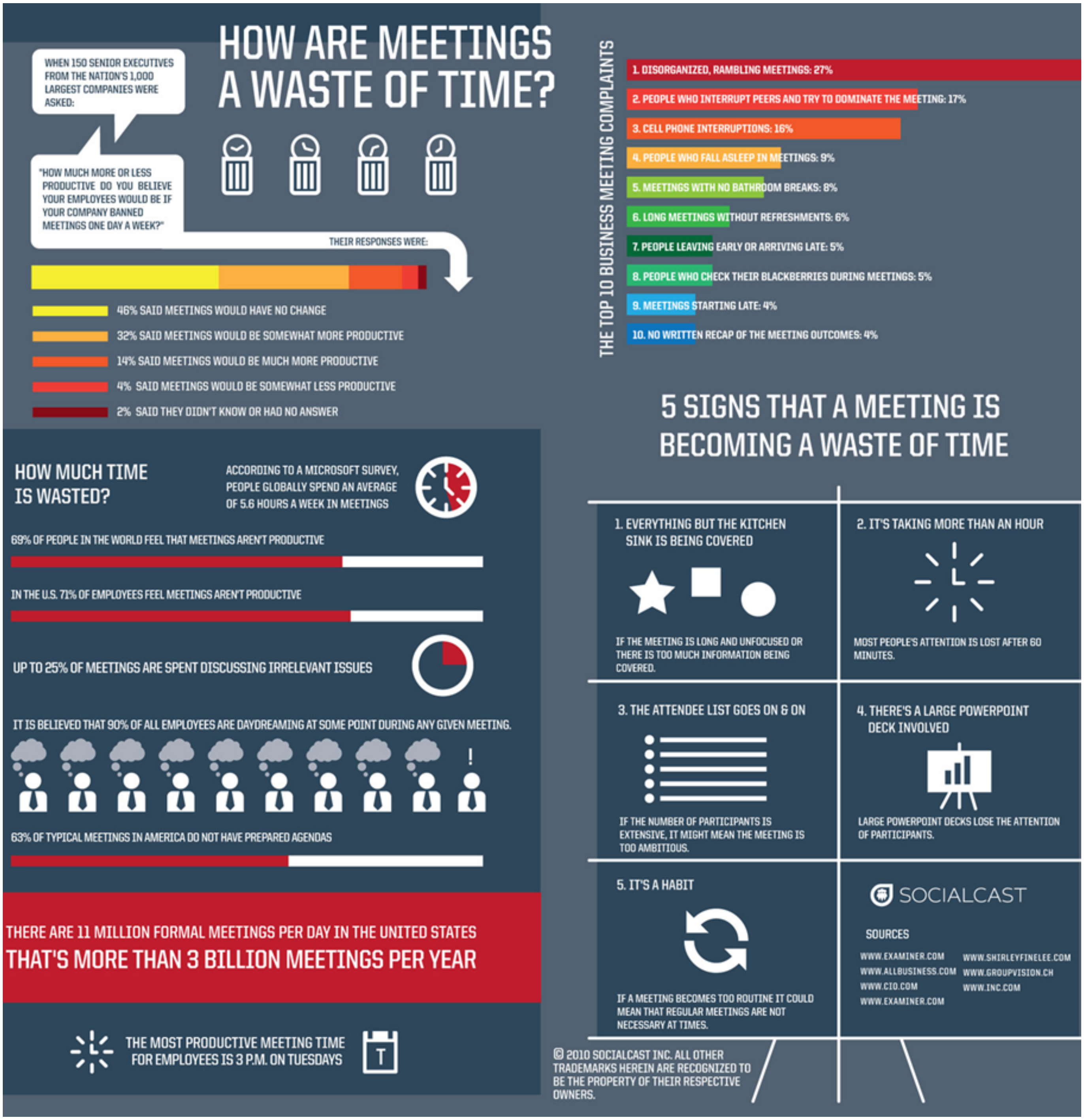
THE CONTEXT FOR BUSINESS MEETINGS

According to a Microsoft survey, with an estimated 11 million formal meetings per day in the United States, corporate America has been held hostage by 3 billion meetings per year. The survey also found that 71% of employees consider meetings unproductive. Here's a great infographic from http://blog.socialcast.com/:



THE CONTEXT FOR BUSINESS MEETINGS

LECTURE # 4 – THE CURRENT STATE OF MEETINGS

SELF REFLECTION: TYPES OF MEETINGS

There are many types of activities that are commonly referred to as a "meetings". What are some of yours?

LECTURE # 5 – THE THREE PRIMARY TYPES OF MEETINGS

We view meetings in three basic types or categories: social, informational, and collaborative meetings.

- ***Social Meetings*** – These meetings are primarily relational in nature and center around a conversation or series of conversations. Social meetings involve two or more attendees and they tend to be more informal and are therefore less structured than the other meeting categories. While these meetings can drive action and decision, their primary focus is typically more about developing business relationships and rapport. Classic examples of social meetings are lunch meetings, coffee appointments, networking events or even some one-on-one staff meetings.
- ***Informational Meetings*** – These meetings are primarily focused on sharing information from a central source (or sources) to other meeting attendees. Information is primarily shared one-directionally in the form of a presentation or lecture; therefore, attendee collaboration tends to be at a minimum. These meetings are less relational than social meetings because of the focus on information sharing versus relationship building. Classic examples of these types of meetings include town hall meetings, project briefings, instructional webinars or group presentations.
- ***Collaborative Meetings*** – These meetings tend to be interactive and action-oriented group gatherings. Their purpose is to align stakeholders while provoking ideas, decision and action. Specifically, we define a collaborative meeting as *a collaborative gathering of two or more people designed to advance an organization, project or opportunity by driving discussion, decision and action, while fostering team alignment and accountability*. Classic examples of these meetings include project team meetings, client sales meetings, executive team meetings, staff meetings, strategy meetings, brainstorming meetings and board of director's meetings.

Virtually any individual meeting can fall into each of the aforementioned categories depending on the content and objectives. For example, there are instances where a "sales meeting" could be social, informational or collaborative depending on what's going on in the meeting. PSM can be leveraged in each of these contexts but is especially needed in collaborative meetings due to the inherent size and complexity.

THE PROBLEMS WITH BUSINESS MEETINGS

LECTURE # 6 – WHAT ARE THE ROOT CAUSE PROBLEMS WITH OUR MEETINGS?

Despite technological advances in communication tools, meetings continue to consume a massive amount of time, as they remain an essential vehicle for collaborating on business challenges and opportunities.

According to research presented in the May 2014 Harvard Business Review (HBR), titled "Your Scarcest Resource":

> *On average, senior executives devote more than two days every week to meetings involving three or more coworkers, and 15% of an organization's collective time is spent in meetings—a percentage that has increased every year since 2008.*

Yet the overwhelming consensus among business professionals is that meetings are an inefficient drain on time and resources. The same *HBR* article noted:

> *That senior executives rated more than half the meetings they attended as "ineffective" or "very ineffective."*

Several prominent research reports indicate meetings as a top time waster among workers surveyed.

- Microsoft surveyed more than 38,000 people in 200 countries. The survey respondents reported that they felt **69 percent** of the time they spent in meetings was unproductive.
- According to research presented in the July-August 2017 Harvard Business Review (HBR), titled "Stop the Meeting Madness" it was noted that:

> *We surveyed 182 senior managers in a range of industries:* ***65%*** *said meetings keep them from completing their own work.* ***71%*** *said meetings are unproductive and inefficient. 64% said meetings come at the expense of deep thinking.* ***62%*** *said meetings miss opportunities to bring the team closer together.*

Common meeting complaints include:

- Too many meetings cut into my "real work" time.
- The meetings are too long.
- The meetings are unproductive; there is a lot of talk, but nothing really gets done.
- The meetings are poorly planned. Sometimes I wonder why we're even meeting.
- People miss meetings or show up late and we waste time bringing them up to speed.
- Too many people in the meetings end up bogging us down.
- We spend so much time rehashing issues and we never make any decisions.
- People use the meeting as a platform for their agendas and derail its purpose.
- There's rarely any follow up after the meeting; everyone just goes off and does their own thing.

SUGGESTED READING

Leslie A. Perlow, Constance Noonan Hadley, Eunice Eun. "Stop the Meeting Madness" Boston, MA: Harvard Business Review, July-August 2017. Online Article: https://hbr.org/2017/07/stop-the-meeting-madness

Stop the Meeting Madness

MEETINGS MAGAZINE ARTICLE by Leslie A. Perlow, Constance Noonan Hadley, and Eunice Eun

Many executives feel overwhelmed by meetings, and no wonder: On average, they spend nearly 23 hours a week in them, up from less than 10 hours in the 1960s. What's more, the meetings are often poorly timed, badly run, or both.

We can all joke about how painful they are, say the authors, but that pain has real consequences for teams and organizations. Every minute spent in a wasteful meeting eats into solo work that's essential for creativity and efficiency. Chopped-up schedules interrupt deep thinking, so people come to work early, stay late, or use weekends for quiet time to concentrate. And dysfunctional meeting behaviors are associated with lower levels of market share, innovation, and employment stability.

The authors have found that real improvement requires systemic change, not discrete fixes. They describe a five-step process for that—along with the diagnostic work you'll need to do in advance.

THE 5 MEETING KILLERS

The good news is that these meeting problems are solvable. Each of the meeting complaints identified earlier can be addressed, and meetings can be the productive tool they are intended to be. But to solve our meeting problems we must look beyond the symptoms and get to the root cause problems (i.e. **pathogens**).

There are five fundamental problems or root causes that impact our meeting productivity, performance, collaboration, and communications. The good news is that most of the problems are easily solved. As a meeting leader, you are given authority to run a meeting and are responsible for the effectiveness of the meeting itself.

☐ LECTURE # 7 – MEETING KILLER #1 – HIGH AMBIGUITY

Ambiguity is the single most dangerous killer of meetings. It creates confusion on:

- Objectives – why are we here and what are we trying to accomplish?
- Agenda – how are we going to achieve our Objectives?
- Outcomes - what was decided and how are we moving forward?
- Accountability – who is responsible?
- Timing – when did we agree on all these things?
- Meaning – what does that statement or that acronym mean?

☐ LECTURE # 8 – MEETING KILLER #2 – LIMITED ACCOUNTABILITY

The importance of creating a culture of personal accountability cannot be understated. Fostering accountability means holding attendees responsible for staying on track with meeting objectives and agendas. It also means accountability for adhering to decisions, taking agreed upon action, and sharing the information necessary to move business forward.

☐ LECTURE # 9 – MEETING KILLER #3 – OVER AND UNDER PARTICIPATION

Too many meeting participants puts a strain on the meeting process and negatively impacts the morale and productivity of the group as a whole. Under participation can also hurt your meetings if essential participants don't show up. A necessary participant is someone who is needed to contribute or "have a part or share" in the objectives of the meeting.

☐ LECTURE # 10 – MEETING KILLER #4 – INADEQUATE PROCESS AND TRAINING

Methods for conducting meetings vary among industries and organizations, but a solid meeting process is vital for effective meetings. Meeting process and approach is typically left to the discretion of the meeting leader, rather than following an established organizational process.

☐ LECTURE # 11 – MEETING KILLER #5 – INSUFFICIENT DATA

Minimal insight into the actual activities of our meetings is a key reason there has been such little improvement in the meeting process. For most organizations, the typical gauge for meeting success is how people feel about the meeting when it ends. We rely on anecdotal emotional reaction to evaluate our meeting productivity. Data is needed for ongoing improvement.

SELF REFLECTION: Capture your thoughts about how the 5 Meeting Killers show up in your meetings:

- INTRODUCTION & OVERVIEW
- MEETING CONTEXT & CHALLENGES
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MEETING PROCESS

SELF REFLECTION: Describe what an effective meeting process would look like in practice?

THE 3-STEP POWERFULLY SIMPLE MEETINGS (PSM) PROCESS

LECTURE # 12 – OVERVIEW OF THE PSM PROCESS (WHO DOESN'T LIKE A GOOD PROCESS?)

We have distilled the essentials of the meeting process into a streamlined three-step Powerfully Simple Meetings process that works: planning, execution, and reporting. While a step can take anywhere from a few minutes to a few days depending on the complexity of the meeting objectives, the bottom line is that each step must be completed in order to consistently lead successful meetings.

LECTURE # 13 – PSM – MEETING PLANNING PROCESS INTRO

STEP 1 – PLANNING

Great business meetings start with thoughtful planning, and thoughtful planning requires five tasks:

LECTURE # 14 – MEETING PLANNING PROCESS STEP 1 – DEFINING MEETING OBJECTIVES

Setting objectives is accomplished by considering two basic questions:

1. What specifically am I seeking to accomplish during my meeting?
2. What do I want others to focus on during the meeting?

Meeting objectives are comprised of statements that complete the following sentence: The objective of this meeting is to______________________.

Examples of these objectives include:

- Obtain final approval to proceed with the next design phase of the ABC project.
- Determine client requirements for information technology (IT) services and establish criteria to demonstrate our capability to meet those needs.
- Communicate the current state of the XYZ implementation and obtain insight from attendees on resolving our two resource issues.

Key Point:

- The importance of clear meeting objectives cannot be overstated. In order to be certain that everyone in the meeting is pointed toward the same target, you must define the target.

LECTURE # 15 – MEETING PLANNING PROCESS STEP 2 – BUILDING THE AGENDA

Once you're clear on the objectives for your meeting you are in a position to map out the best course of action for accomplishing those objectives (that is, your agenda). Your agenda represents the components and sequence of the meeting needed to achieve your stated objectives.

Each agenda item should consist of:

1. Agenda Item Overview—a short description that makes it crystal clear what will be covered during this part of the meeting.
2. Leaders—individual(s) responsible for leading the agenda topic and guiding its results.
3. Time—an estimated amount of time allocated to cover the agenda item.

Key Points:

- Each meeting must have at least one agenda item that supports one or more meeting objectives.
- If an agenda item doesn't support an objective, then you have either an unnecessary agenda item or inadequate meeting objectives.

- The meeting agenda should be distributed to meeting attendees prior to the beginning of the meeting. Lead-time will vary but twenty-four hours is a good rule of thumb.

LECTURE # 16 – MEETING PLANNING PROCESS STEP 3 – IDENTIFYING REQUIRED MATERIALS

Once the objectives and agenda are established it's time to think through meeting materials. The key questions to be addressed include:

1. What materials are required to support my meeting objectives and agenda?
2. When do I need to distribute these materials to attendees?

Key Points:

- Determining what materials are required to support your agenda and how they will be utilized is ultimately determined by the meeting leader and the agenda topic leaders.
- Familiarizing attendees with the meeting content as early as possible is generally in the best interest of driving results. However, we recognize this is a decision best left to the realities of the organization and discretion of the meeting leader.

LECTURE # 17 – MEETING PLANNING PROCESS STEP 4 – DETERMINING REQUIRED MEETING ATTENDEES AND SUBSCRIBERS

Once your meeting content is planned, you are in a position to determine who to involve in your meeting. We distinguish between two types of stakeholders when organizing and executing your meetings:

1. **Attendees**. These are individuals whose contribution is essential to support the agenda and accomplish your meeting objectives.
2. **Subscribers**. These are individuals who have a vested interest in the content and results of the meeting, but whose attendance is not required to meet the objectives. By leveraging the PSM process we are able to provide these stakeholders with the information they need without consuming their precious time in our meetings. We'll cover that more in the next sections.

Key Points:

- Meeting Subscribers function as consumers of meeting information and our focus is on keeping them informed.
- Subscriber time can be much better utilized by providing them with the information they need after the meeting.
- There are exceptions to best practices of determining who should be invited to attend your meetings (e.g. politics, learning opportunities, etc.). While these isolated instances exist, the meeting leader should strive for a clean delineation between attendees and subscribers wherever possible.

LECTURE # 18 – MEETING PLANNING PROCESS STEP 5 – TACKLE MEETING LOGISTICS

Logistics work covers the basics of finalizing the meeting date, time, location and duration based on the previous planning work mentioned above.

Key Points:

- PSM does not prescribe any hard rules about managing meeting logistics, other than that they need to be done, and done well!
- Meeting leaders are responsible for ensuring every detail of the meeting is considered and covered.

STEP 2 – EXECUTION

LECTURE # 19 – PSM – MEETING EXECUTION PROCESS INTRO

The meeting execution phase takes place from the time a meeting begins until the time a meeting is adjourned. Simply put, the execution phase is about implementing the planned meeting approach, leading and aligning stakeholders and capturing the value generated along the way.

From the time a meeting begins until the time it is adjourned, our focus is on driving our attendees through a process to efficiently attain our meeting objectives while capturing the essential value generated along the way. The execution phase of PSM has three components: initiation, body, and conclusion.

LECTURE # 20 – MEETING EXECUTION PROCESS STEP 1 – MEETING INITIATION

Meeting initiation is about setting the context for the meeting so that everyone is aligned and ready to drive toward the meeting objectives. In a standard one-hour meeting, a rule of thumb is to dedicate the first three to five minutes to outline the context of the meeting.

Example: As you might know we had a security breach in our website over the weekend. So, the focus of our time here today will be to brief you on the details of the breach and obtain your input on a plan to remedy the situation going forward. To that end, our agenda is to . . .

Key Points:

- Meeting objectives and agenda are reviewed during the initiation phase
- Meeting initiation is the time for you to set expectations about the protocols, guidelines or special requests of your meeting
- It's also a great time to ask if attendees have any other expectations, objectives or special circumstances (for example, need to step out of the meeting or leave early).
- The final component of the initiation phase is to record attendance.

Notes:

LECTURE # 21 – MEETING EXECUTION PROCESS STEP 2 – MEETING BODY

The meeting body contains the bulk of the meeting time and it is where the majority of the meeting value is created. The body of the meeting involves two main functions for the meeting leader to manage: flow and capture.

Flow

The meeting leader is responsible for ensuring that the meeting flows from initiation, through the agenda, and drives toward the achievement of the meeting objectives. Along the way attendees might veer off course. Flow consists of pacing the meeting appropriately to ensure that the meeting objectives are met. Essentially, flow involves keeping your meeting focused on the objectives and agenda and on time.

Another key aspect of meeting flow is to keep attendees engaged and focused on the meeting objectives. It is inevitable that someone in your meeting will introduce a discussion that has little or nothing to do with the objectives of the meeting. We'll cover how to handle this later in the essential meeting leader skills section.

Capture

Beyond the meeting flow, the most important responsibility of the meeting leader is to make sure that the important information that surfaced in the meeting is captured. Within PSM we refer to this information as "meeting assets" and we are going to dive into meeting assets more next.

Notes:

LECTURE # 22 – INTRODUCTION TO MEETING ASSETS – WHAT ARE MEETING ASSETS? (GLAD YOU ASKED!)

SPOTLIGHT "MEETING ASSETS" - Simply put, Meeting Assets are the fruit of the meeting and must be appropriately picked. Meetings are the vehicles that generate intellectual property in the form of thought, action, and decision. Effective meeting management requires this intellectual property to be captured, owned, and communicated in order for it to retain and transmit value.

If your business meetings are not generating tangible assets for your organization, then consider why you are meeting. Meetings should be used to generate assets that move your business forward.

LECTURE # 23 – AWARENESS TEST (BE HONEST, YOU DIDN'T' SEE IT COMING DID YOU?)

SELF REFLECTION: What did you learn from the video? How does this apply to your meetings?

LECTURE # 24 – THE IMPORTANCE OF AWARENESS

The hardest part of capturing meeting assets is that there is likely a lot of "noise" vying for your attention when you are in a meeting. Meeting environments often produce a climate that breeds the five meeting killers. Heading into your meetings with a clear understanding of the types of outcomes you are looking to create and capture significantly increases the probability that you will identify those outcomes and ensure that they are clarified and documented so that they can be communicated.

LECTURE # 25 – INTRO TO MEETING ASSET DEVELOPMENT EXERCISE

The types of meeting assets that are generated in business meetings vary across organizations and meetings. Learning how to identify, extract and communicate meeting assets is the cornerstone of the PSM system. We rely on the capturing and communication of meeting assets as a cornerstone strategy for mitigating the meeting killers discussed earlier.

Outstanding meeting leaders know how to minimize the noise that permeates meetings and extract the intellectual property generated in their meetings. A meeting asset mindset enables meeting leaders to filter out the distractions in the meeting environment and focus on the valuable intellectual property that is created.

Once your brain is focused on collecting meeting assets, you will realize just how prevalent they are within your meeting space. Even in the least productive meetings, meeting assets are sure to exist.

Specific meeting assets can vary depending on the context of the meeting. A project-based meeting might have assets that identify action items, decisions, issues, key ideas and risks. A sales meeting might have assets that identify objections, competitor intelligence, budget information, client commitments and more.

The first step is to identify the assets you are looking to extract from your meetings. This involves thinking through the underlying business process and brainstorming through a few key questions. Once you have determined your meeting assets, the next step to understand the attributes related to each asset.

Example Meeting Assets

Project Team Meetings	Client Sales Meetings	Executive Team Meetings
Action Items	Action Items	Action Items
Decisions	Commitments	Decisions
Key Ideas	Decision Process/Makers	Key Ideas
Issues	Budget Information	Key Performance Indicators
Risks	Client Objections	Key Messages

LECTURE # 26 – DEVELOPING YOUR MEETING ASSET MODEL EXERCISE

Asset Exercise: **Print the Asset Development Exercise Located in Appendix B**

Notes:

Key Points:

- Meeting Assets are the single most important tool for battling the five meeting killers
- The meeting leader is responsibility to ensure the intellectual property is captured and clarified throughout each agenda item discussion.
- The meeting leader does not own all of the meeting assets raised during the course of a meeting, but he or she does maintain the responsibility to ensure they are captured and communicated.
- Meeting assets should be shared with attendees and subscribers to ensure that information is communicated, and stakeholders are appropriately aligned.

LECTURE # 27 – CAPTURING MEETING ASSETS

Meeting Asset Capture ICD Framework – ICD (Identify, Clarify, Document)

Step	Timing	Comments
Identify	Immediately	Take a quick note to capture the meeting asset
Clarify	When Appropriate	• Clarify immediately if the asset is important to the rest of the current agenda topic. • Clarify at the conclusion of the agenda topic if the asset is important to future agenda topics. • Clarify during meeting closure or after the meeting has concluded in the meeting summary report creation.
Document	As Soon As Possible After The Meeting Ends	Document while the information is fresh in your memory and distribute to attendees while it is fresh in their memories.

LECTURE # 28 – COMMUNICATING MEETING ASSETS

Meeting Assets are the foundation of the Meeting Summary Report that is distributed at the conclusion of each meeting. Too often we see organizations trying to capture everything that was said during a meeting. This approach to documenting meeting outcomes creates lengthy documents that nobody reads, and it fails to reinforce and communicate the key outcomes to both attendees and other stakeholders who may not have attended the meeting. We call these individuals meeting subscribers and the meeting summary report is the key to keeping them informed.

LECTURE # 29 – MEETING EXECUTION PROCESS STEP 3 – MEETING CONCLUSION

The final step in the body of the meeting execution phase is to bring the meeting to conclusion. A common tendency of meeting leaders is to allow meetings to run until the end of the allocated time without leaving time for necessary summary and closure. As a result, meetings frequently run over or end abruptly as attendees hustle off to other obligations.

For a standard one-hour meeting a meeting leader should begin concluding with approximately five to ten minutes left in the meeting. This is important for several reasons:

1. It provides time to communicate and clarify meeting assets (when needed) and discuss next steps.

2. It minimizes the need for follow-up meetings if you leave enough time to complete necessary discussion or decision.
3. It guards against "back-loading" where attendees introduce a last-minute curveball topic at the end of a meeting with no time to discuss.

Concluding the meeting is as simple as reviewing the key assets captured throughout the meeting and confirming next steps and expectations.

Key Points:

- It is also important to keep in mind that it is common to uncover disagreement when recapping meeting assets and concluding a meeting.
- The point of concluding the meeting appropriately is to ensure that attendees are aligned as they exit the meeting.

Notes:

LECTURE # 30 – MEETING REPORTING PROCESS

STEP 3 – REPORTING

Task One: Develop Your Meeting Summary Report

The reporting phase is essential to achieving the clarity and accountability we desire. In our experience we've observed meeting output taking one of two main forms:

1. Meeting minutes
2. Nothing (with the vast majority of meeting output being nothing)

While producing meeting minutes is typically better than doing nothing, minutes tend to be too voluminous and fail to distinguish important information from superfluous content. This approach does little to improve the clarity and accountability we desperately need in the meeting process. To make matters worse, meeting minutes take a lot of time to prepare and are rarely ever read.

PSM includes the distribution of a ***meeting summary report*** that captures the most important meeting assets along with a few pieces of other important information. Remember our goal is to ensure clarity, accountability and alignment in the meeting process. The meeting summary report includes the following components:

1. Meeting Attendees—Document who attended and who didn't.
2. Meeting Assets—Document all the meeting assets captured and their associated attributes
3. Meeting Objective Review —Confirm whether the meeting objective(s) were accomplished.
4. Agenda Items Covered—Identify the agenda items that were completed and those that were not completed.

Preparing the meeting summary report is simple so long as you capture meeting assets effectively. Once completed, the meeting summary should be quickly distributed to be reviewed and memorialized.

Note: *an example meeting summary report is included in the appendix of this participate guide.*

Key Points:

- The meeting leader should distribute the meeting summary report within forty-eight hours after the meeting occurred (within twenty-four hours is ideal).
- Quick turnaround helps to reinforce accountability and obtain feedback while the content is fresh in attendees' minds.
- Attendees should be asked to review the meeting summary report and comment/edit as needed within a specified period of time (the shorter the better).
- Once finalized, the final version of the meeting summary report can be distributed to the stakeholders and subscribers. This ensures that subscribers have the information they need to perform their role and provides a clean starting point for your next meeting.

Notes:

- INTRODUCTION & OVERVIEW
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LECTURE # 31 – INTRO TO ESSENTIAL MEETING LEADERSHIP SKILLS

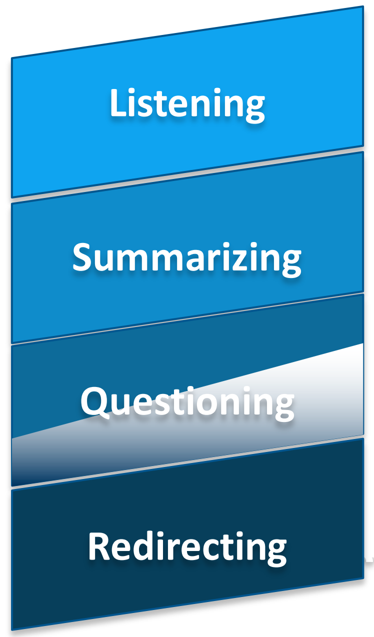
THE FOUR ESSENTIAL MEETING LEADER SKILLS

While good process is the cornerstone of effective business meetings, it requires a skilled leader to effectively operate the process.

Meeting leader skills are the core competencies possessed by the best meeting leaders.

There are four essential skills that great meeting leaders must possess: listening, summarizing, questioning and redirecting.

The Powerfully Simple Meeting process, combined with these essential meeting leader skills, ensures you are off to a great start to neutralizing the five meeting killers and producing the results you desire.



LECTURE # 32 – ESSENTIAL MEETING LEADERSHIP SKILL # 1 LISTENING INTRO

The quality of our listening is inversely related to the amount of distraction we are experiencing at any point in time. Essential for meeting management, leaders must minimize distraction and fully listen in the meetings they are leading.

LECTURE # 33 – ESSENTIAL MEETING LEADERSHIP SKILL # 1 LISTENING ZONES

- **Zone of Distraction:** The distraction zone is when you are physically in the meeting, but you are mentally in a different place. This zone occurs anytime your attention is not on the meeting attendees, objectives, agenda, process, and content.

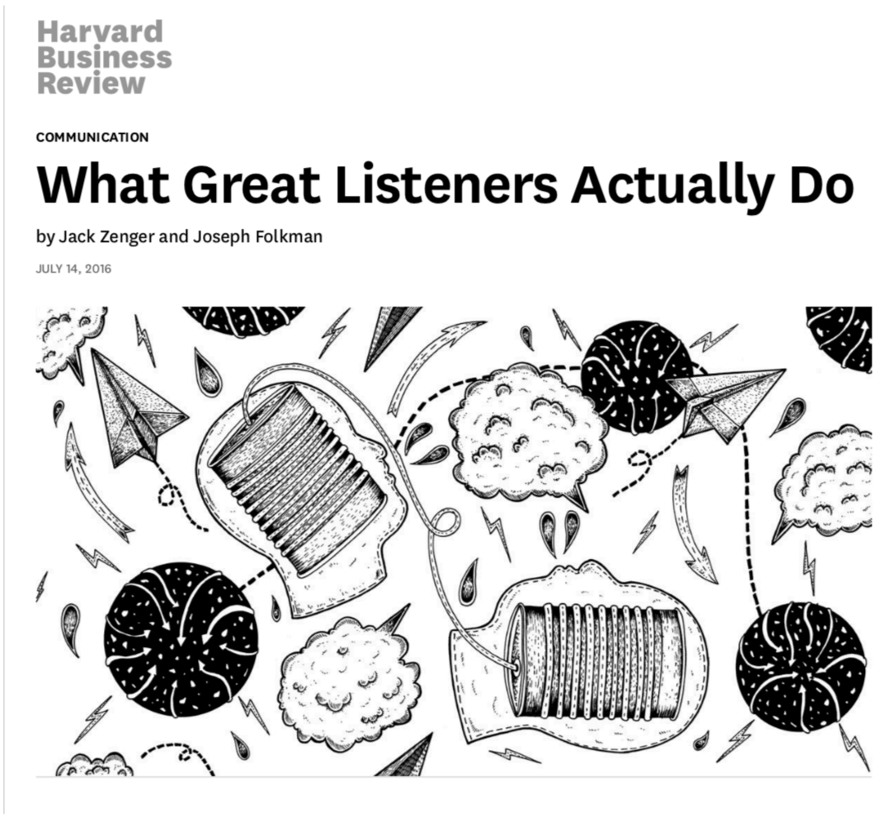
- **Zone of Focus:** The focus zone means that you are fully engaged in the meeting dialogue. Your focus and attention are on the meeting objectives, the attendees, and the corresponding discussion. You are listening to what attendees are saying as well as how they are saying it. You are interpreting their body language, hearing their tones, and consciously soaking it all in.

LECTURE # 34 – LISTENING EXERCISE - VIDEO

SELF REFLECTION: How are you showing up in the area of listening?

SUGGESTED READING

Jack Zenger and Joseph Folkman. "What Great Listeners Actually Do" Boston, MA: Harvard Business Review, July 2016. Online Article: https://hbr.org/2016/07/what-great-listeners-actually-do



Harvard Business Review

COMMUNICATION

What Great Listeners Actually Do

by Jack Zenger and Joseph Folkman

JULY 14, 2016

For additional listening insight, we recommend the following TEDx video, which can be found at http://mtgresult.com/listening

The Four "E's" of Powerful Meeting Leader Listening:

Eliminate Distractions	Put your phone out of sight, close your email application, close your instant message application
Engage Your Attendees	Look at attendees when they are speaking, take notes on what they're saying, summarize what they say, ask questions about what they say
Enhance Their Experience	Enhance the experience by building them up, get your "but" out of the way by using the agreement frame, make it a cooperative conversation
Empathize With Attendees	Where appropriate validate stakeholder feelings, remove judgment, seeking to understand where they are coming from

☐ LECTURE # 35 – ESSENTIAL MEETING LEADERSHIP SKILL #2 – QUESTIONING INTRO

A good question can refocus a conversation, expand our thinking, and clarify uncertainties. In a meeting context, good questions are the most important tool in obtaining clarity, alignment, and accountability.

Questions can take on various forms and be used for many purposes.

☐ LECTURE # 36 – ESSENTIAL MEETING LEADERSHIP SKILL #2 – QUESTIONING (CLOSED ENDED QUESTIONS)

- **Close Ended Questions:** Close ended questions are designed to generate a focused response, such as 'yes' or 'no'. These questions limit the choice of responses, eliminate ambiguity, and are a vital tool for every meeting leader to make important distinctions.

  Examples:
  Did you confirm that the system would be ready for user acceptance testing by October 1st?
  Would everyone agree that we've made a decision to delay the project until February 1st?

☐ LECTURE # 37 – ESSENTIAL MEETING LEADERSHIP SKILL #2 – QUESTIONING (OPEN ENDED QUESTIONS)

- **Open Ended Questions:** Open ended questions require more than a simple yes or no answer. They are exploratory questions designed to dig beneath the surface of the discussion. Open ended questions facilitate the gathering and sharing of information during the meeting process.

  Examples:
  Would you share your thoughts on the decision to delay the project until January?
  What are some alternatives to postponing the project until January?

LECTURE # 38 – ESSENTIAL MEETING LEADERSHIP SKILL #2 – QUESTIONING (SPECIFYING QUESTIONS)

- **Specifying Questions:** Specifying questions do not provide a finite list of options (e.g., yes or no), and they are not open to whatever thoughts or feelings a stakeholder wants to express (i.e., open ended questions). Specifying questions are designed to help attendees make specific statements in a timely manner.

  In a meeting context we focus on specifying questions in three primary instances: Unspecified nouns, actions, and timing. While there are multiple ways to dig for clarity in each instance, a simple model includes the use of an interrogative pronoun (i.e., who, what, how, when) followed by the word "specifically".

  Unspecified Nouns Examples:
  For example: "OK, I'll have them set it up and have that over to you later next week." It is not entirely clear who "them" is and what "it" is. To remedy this, the question could be, "Who specifically is going to set it up"? Another question could be, "What specifically are they setting up"?

  Unspecified Actions Examples:
  For example: "My team will knock it out next week". Perhaps you know what they mean by "knock it out" or you may want to clarify by responding, "How specifically are you going to knock it out?"
  Consider another example: "We'll have the training room ready to go when the executive team arrives next week." Again, you may know what "ready" means, or you may need to clarify by asking, "How specifically will you ensure it will be ready?"

  Unspecified Timing Examples:
  For example: "We should have that done by early spring." If needed, the ready response to this is, "When specifically, in the spring do you estimate having that done?"

QUESTION TYPES AND USAGE SUMMARY

Close Ended Questions	You simply want a Yes or No answer
Open Ended Questions	You want to explore an area more
Specifying Questions	You need additional clarity on a specific matter

LECTURE # 39 – QUESTIONING EXERCISE

Questioning Exercise: Print the Questioning Exercise Located in Appendix C

Follow the instructions and complete the Questioning Exercise: Leveraging the ease and power of the specificity model.

Notes:

LECTURE # 40 – ESSENTIAL MEETING LEADERSHIP SKILL #3 – SUMMARIZING

Summarizing is a critical skill when it comes to meeting management. The ability to take a large sum of information and distill it into key themes, concepts, thoughts, and ideas is essential. Like other meeting skills we have discussed, summarizing has broader applicability beyond meeting management. Learning clearer, more concise communication skills is a benefit in any communications situation.

- **Comment Summarizing:** Comment summarizing takes place to ensure attendees have correctly understood what the stakeholder intends to communicate. By extracting the extraneous information, the meeting leader is able to play back the parts that are most relevant to the content of the meeting.

Comment Summarizing Model
1. Acknowledge: "Ok", "Got it", or "Understood" 2. Summarize: Shorten and playback comment 3. Confirm: Listen for confirmation or correction

- **Conversational Summarizing:** Conversational summarizing should happen at various points within a meeting. It is more of an art than a science, and there is no exact formula of when to summarize a conversation. A general rule of thumb is that a conversational summary should occur after each significant agenda item or collection of each meeting asset.

Conversational Summarizing Model
1. Interject: "So in summary *what I'm hearing is*" 2. Summarize: Shorten and "bullet" conversation 3. Ask: "Is that accurate?", or "Did I get that right?" 4. Confirm: Listen for confirmation or correction

- **Meeting Summarizing:** Meeting summarizing is the ability to piece together the meeting assets, conversational summaries, and key themes into a concise format that can be shared and remembered. Meeting summarizing is not synonymous with meeting minutes. Meeting minutes often have too much detail, take too long to prepare, and generally fulfill a reporting requirement versus adding value.

LECTURE # 41 – SUMMARIZING EXERCISE

Questioning Exercise: Print the Summarizing Exercise Located in Appendix D

Follow the instructions and complete the Summarizing Exercise: Leveraging comment and conversational summarizing.

Notes:

LECTURE # 42 – ESSENTIAL MEETING LEADERSHIP SKILL #4 – REDIRECTING INTRO

Keeping attendees focused on producing results consistent with a meeting's objectives and agenda is a vital responsibility of a meeting leader. This task can become challenging depending on the nature of the meeting content, attendee personalities and the natural inclination for stakeholders to veer off topic.

LECTURE # 43 – ESSENTIAL MEETING LEADERSHIP SKILL #4 – REDIRECTING AWARENESS

Redirecting is about getting meeting attendees back on track when they stray from the focus of the meeting. As it is virtually impossible to keep meeting attendees on course all the time, a meeting leader must be skilled enough to bring everyone back on track when needed. We recommend a three-pronged approach to determine when and how to get attendees back on focus.

1. Have a clear understanding of the meeting objectives and stay in the listening zone of Focus
2. Have patience to allow attendees to get back on track but don't allow things to go too long
3. Take action to get the meeting back on track

- **Pre-Frame:** The first tactic for redirecting attendees happens before the need to redirect ever surfaces, a tactic we call the ***pre-frame***. The pre-frame establishes the expectation that attendees stay on target and that the meeting leader will take the responsibility for keeping the meeting on track. This is best performed during the initiation phase of the meeting or in advance of the meeting if you are leading a meeting that is at high risk of going off course.

  Example:

  Before reviewing our agenda, I want to mention that we have an aggressive schedule and are very tight on time. So, it's important that we stay on topic. If it looks as if we're heading off course from our objectives. I'm asking your permission to get us back on track. Does that work for everyone?

LECTURE # 44 – ESSENTIAL MEETING LEADERSHIP SKILL #4 – REDIRECTING TACTIC # 1 (HARD REDIRECT)

Hard Redirect: A hard redirect is the most simple and efficient way to get your meeting attendees back on track. However, because it is so direct, it might not be appropriate in every organizational culture. The approach here is simple and direct:

a) Interrupt the wayward discussion.

b) Explain why it's important to get on track (that is, for the sake of time).

c) Tell attendees where to go next.

Example:

Meeting Leader: *OK, we're getting off course, as this discussion is not directly related to our meeting objectives. In the interest of everyone's time, we need to move forward to the next agenda item.*

Notes:

LECTURE # 45 – ESSENTIAL MEETING LEADERSHIP SKILL #4 – REDIRECTING TACTIC # 2 (SOFT REDIRECT)

Soft Redirect: The soft redirect follows a similar syntax to the hard redirect but is done in a more sensitive manner. The soft redirect is more appropriate for organization cultures and meeting environments where ruffling feathers is not welcomed. It works like this:

a) Interrupt the wayward discussion by "appreciating" their thoughts "and" letting them know that "we're" straying from the agenda.

b) Explain why it's important to get on track.

c) "Suggest" then where to go next and move on.

Example:

Meeting Leader: *OK I appreciate where you're going with this discussion, and I also know that we're getting away from the meeting objectives we established. So, in respect of our time together I suggest we move forward.*

Notes:

LECTURE # 46 – ESSENTIAL MEETING LEADERSHIP SKILL #4 – REDIRECTING TACTIC # 3 (SEGUE)

Segue: Occasionally meeting attendees get entrenched in an area of dialogue that isn't going any further. They aren't necessarily off track, but the discussion has exhausted itself and there isn't any more ground to cover. This can happen in places of violent agreement where attendees continually reinforce each other, or instances where they just get lost rehashing recent dialogue. In any case the path forward here is a simple tactic called the "segue". It works like this:

a) Interrupt the exhausted discussion.

b) Acknowledge the progress made (for example, "well done").

c) Segue to the next agenda item.

Example:

Meeting Leader: *OK, well done, and that's a great segue to our next agenda item.*

Notes:

LECTURE # 47 – ESSENTIAL MEETING LEADERSHIP SKILL #4 – REDIRECTING TACTIC # 4 (CAPTURE AND MOVE ON)

Capture and Move On: It is common to reach an area of discussion that is well within the scope of the meeting (that is, it is not off topic) yet is far from being complete (that is, not something to segue). These discussions happen when there is an impasse or a stalemate that has been reached and it's clear that it's not going to be resolved during the meeting time allocated. Rather than consuming precious meeting time, the role of the meeting leader is to redirect in a way that doesn't ignore the impasse but allows the meeting to continue—a tactic we refer to as *capture and move on*.

Attendees need closure on open items and want to know that some action is going to be taken as a result of the discussion. Capture and move on provides them what they want so that you can productively move forward with the rest of your meeting.

The goal is to bring the discussion to a close so that it can be addressed at a more optimal time (that is, when you have sufficient time and attendance to resolve the matter). It works like this:

a) Interrupt the stalled discussion.

b) Explain why it's important to table the discussion (for example, in the interest of time).

c) Ensure attendees that the matter will be captured.

d) Assign (or take) an action item to do whatever needs to be done next.

Example:

Meeting Leader: *OK, it's clear we're not going to solve this issue during our time today, and I want to be sure we use our time wisely, so I will capture this as an open item and ensure we have enough time allocated in our next meeting to resolve. So, let's move on.*

LECTURE # 48 – REDIRECTING EXERCISE

Redirecting Exercise: Print the Summarizing Exercise Located in Appendix E

Follow the instructions and complete the Redirecting Exercise: Leveraging redirects to keep your meetings flowing.

Notes:

- INTRODUCTIONS & OVERVIEW
- MEETING CONTEXT & CHALLENGES
- POWERFULLY SIMPLE MEETING PROCESS
- ESSENTIAL MEETING LEADER SKILLS
- **IMPLEMENTING PSM IN YOUR ORGANIZATION**
- APPENDIX

PARTICIPANT GUIDE

SELF REFLECTION: What are some challenges that you anticipate encountering while implementing PSM in your organization and how will you overcome those challenges?

IMPLEMENTING PSM IN YOUR ORGANIZATION

LECTURE # 49 – GETTING STARTED INTRO

Now that you are equipped with a thorough understanding of the fundamental challenges with business meetings and the strategies for handling them, where do you go from here?

Implementing the PSM system in your organization is best achieved at a grass roots level; one meeting at a time, building on the small successes that you achieve in each meeting and adjusting along the way for continuous improvement.

There are three main steps for implementing PSM within your organization which are covered in the next three lectures (50, 51, and 52).

1. Step 1 – Organize and ready your tools
2. Step 2 – Communicate the changes to all stakeholders
3. Step 3 – Run your first meeting with PSM with a focus on the basic tenants of our system. Take what you learn and adjust as required.

LECTURE # 50 – GETTING STARTED STEP 1 – ORGANIZE AND GET YOUR TOOLS READY

This lecture is all about getting the two fundamental meeting tools ready for use in meetings. The two fundamental tools are:

1. Meeting Agenda Template – The Meeting Agenda should be send out at least 24 hours in advance of your meeting and should include the following:
    a. Clearly defined Objective(s)
    b. Agenda Structured and Sequenced to achieve your Objective(s). This includes allocation of time for each agenda topic and the agenda topic leader(s).
    c. List of Attendees and Subscribers
    d. Logical Meeting Information (location, date/time, duration)

2. Meeting Summary Report Template - The Meeting Summary Report allows you to capture and easily communicate the essential content extracted from your meeting. The Meeting Summary Report helps you to:
    a. Clarify meeting outcomes
    b. Reinforce accountability for key notes, action items, decisions, issues and risks captured during the meeting
    c. Inform subscribers of the important information that surfaced in the meeting
    d. Provides a historical record of the meeting for reference in the future
    e. Provides you a place to capture meeting assets during the meeting

LECTURE # 51 – GETTING STARTED STEP 2 – COMMUNICATE NEW APPROACH TO MEETINGS TO STAKEHOLDERS

Before you begin conducting meetings using the PSM System you need to inform stakeholders about the changes that they will experience with meetings and what to expect. They don't necessarily need to take the full PSM Workshop, although they would benefit from doings so, but they do need to understand how they will interact and engage with the PSM System and what they can expect in terms of changes in how meetings are conducted and what communications they will receive and when they will receive them. We have created three tools to help you communicate the PSM System to your stakeholders.

1. Stakeholder Communication – Email template that you can send out to all stakeholders informing them that you are implementing a new meeting process and providing them a brief overview of the PSM System.
2. Stakeholder Job Aid – Quick reference that Stakeholders can refer to as they engage in the new meeting process.
3. Stakeholder Presentation – PSM presentation that can be tailored and used during your initial meetings to educate all stakeholders on the PSM System.

Using these tools together you can be certain that your Stakeholders are informed and equipped to engage in the PSM System that you are implementing for your meetings.

LECTURE # 52 – GETTING STARTED STEP 3 – RUN YOUR FIRST MEETING WITH A FOCUS ON THE BASICS

The focus here is to just get started with an understanding that you will need to make adjustments as you learn from your experience implementing PSM. To learn what adjustments you need to make it is helpful to ask yourself some questions after you have completed several meetings:

1. Are you identifying the right stakeholders (i.e. meeting attendees and subscribers) for your meetings?
2. Are you capturing the right kinds of meeting assets for inclusion in your meeting summary reports?
3. Do your stakeholders understand the meeting process?
4. Are your stakeholders buying into the meeting process?
5. Is the Meeting Summary Report effectively utilized (i.e. are people reading the Meeting Summary Reports and providing corrections when something is not captured correctly)?
6. What other adjustments can you make to improve the meeting process?

The answers to these and other questions that you come up with will help you to tailor and improve the meeting process within your organization.

Once your meeting process is optimized you may want to consider using technology to automate and streamline the work involved in operating the meeting process. In the next lecture we will review automating the meeting process with technology.

SUMMARY OF PUTTING THE PIECES TOGETHER AND IMPLEMETING PSM

Remember, our objective is to mitigate the five meeting killers: **High Ambiguity, Limited Accountability, Over and Under Participation, Inadequate Process and Training, Insufficient Data**
And we do this through a simple process and skill-based strategies.

We recommend that you consider starting with the fundamentals and work to incorporate more advanced techniques as you become familiar with the PSM System and see the results that you are achieving:

Process Step	Fundamental	Advanced
Planning	Prepare Agenda – establish clear objectives and agenda items.	Agenda prepared and delivered 24+ hours in advance of meeting with clear objectives and agenda items. Only invite stakeholders needed to accomplish the meeting objectives.
Execution	Capture Assets – summarize only the most important meeting content.	Meetings start and end on time. Assets are captured, clarified, managed and consistently followed up on.
Reporting	Share Assets – share assets with attendees.	Share assets with other key stakeholders (subscribers), obtain feedback and further clarify assets as needed.

Skill	Fundamental	Advanced
Listen	Monitor Your Zone – meeting leader actively manages self-awareness of listening state.	Monitor Others – guide others in their listening by effectively managing meeting flow and keeping them on track.
Question	Use Specifying Questions – critical meeting content is clarified to ensure complete understanding of content.	Leverage Full Suite of Questions – intentional use of closed-ended, open-ended and specifying questions to guide meeting discussion to the accomplishment of your objectives.
Redirect	Pre-frame and Soft Redirect – establish expectations that you will keep attendees on track and refocus the discussion as needed.	Leverage Full Suite of Redirects – keep conversation on track in a direct, professional and respectful way, while ensuring attendees remained focused on the task at hand.
Summarize	Comment Summary – leverage comment summarizing to ensure alignment and reinforce key discussion points.	Conversational Summary – leverage both listening and summarizing skills to recap key conversations (particularly those rich in assets) to ensure stakeholder alignment with key meeting content.

Other Key Points:

- Let stakeholders know you're focused on improving meeting effectiveness and to expect positive changes
- Launch your new meeting process and skills, see what works (and what doesn't) and adjust as needed – perfection is not the goal, continuous improvement and productivity is!

Notes:

LECTURE # 53 –AUTOMATE MEETING PROCESS WITH TECHNOLOGY

Information technology is used throughout the business world to help store, retrieve, process and distribute information in support of various business processes. Some examples include accounting systems, email systems, content management systems and customer relationship management systems. These systems help to automate and streamline the process of capturing and managing large volumes of information to support decision making and other critical business functions.

You could use a notebook or even a spreadsheet to manage your accounting functions, but this would require a lot of manual effort and it would be difficult to access and utilize your organization's financial information in a timely manner. Similarly, you could use a notebook or a word document to manage and capture meeting related information, but this too would require a lot of manual effort and would result in information being scattered across many separate documents inhibiting your ability to locate, manage and leverage important meeting information such as decisions made, issues or risks identified, and actions assigned. Using a system, like MeetingResult, that was built specifically to manage meeting related information is a much better alternative to notebooks and word documents and provides the following benefits:

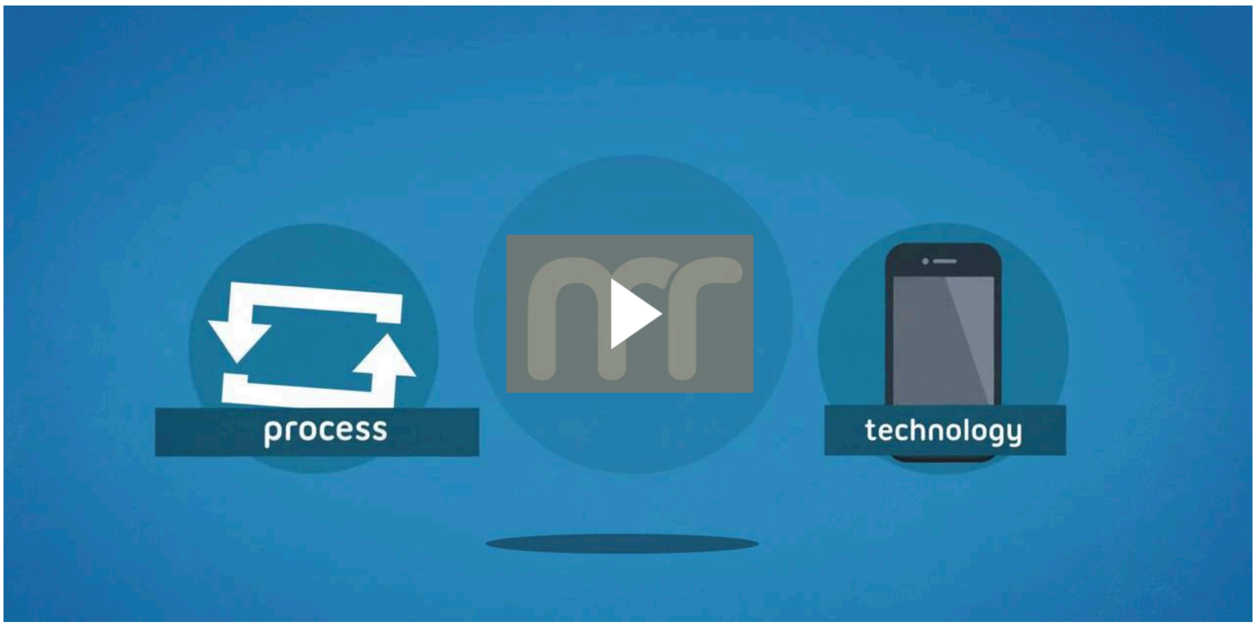
- Streamline and automate the implementation of the entire meeting process
- Automate the creation and distribution of meeting agendas and meeting summary reports
- Provide a comprehensive and centralized knowledge base for all your meeting information that is accessible to all team members
- Leverage your meeting knowledge base to ensure important information is not lost when employees leave the organization
- Leverage your meeting knowledge base to quickly ramp up new team members
- Keep track of key decisions made
- Manage issues and risks across all projects
- Track assignments and enforce accountability
- Leverage the built-in metrics platform to quantify meeting performance and target areas for improvement

Notes:

LECTURE # 54 – MEETINGRESULT MEETING MANAGEMENT SOFTWARE PLATFORM DEMO

The demo provides an overview of the implementation of the of the PSM meeting process within the MeetingResult meeting management software application. The PSM meeting process consists of the following three phases:

1. Meeting Planning
2. Meeting Execution
3. Meeting Reporting



Notes:

WHERE TO GO FOR MORE INFORMATION

For more information, including our process, tools and technology, visit us at www.meetingresult.com

To download meeting agenda and meeting summary reports and other templates visit us at mtgresult.com/templates

To contact MeetingResult regarding software demonstrations and licensing please contact Bryan Field at bfield@meetingresult.com

To inquire on other standard and custom training programs please contact Peter Kidd at pkidd@meetingresult.com

Have other questions we can help you with? Feel free to contact us at:
Bryan: bfield@meetingresult.com - (703) 477-3073
Pete: pkidd@meetingresult.com - (703) 901-3678

People Are Talking …

"MeetingResult has helped me regain control over my productivity by helping me better plan and more consistently run sales meetings that create the kind of client urgency that is required in high stakes sales."
- Charles Hollander Jr., Founder, Red Flag Training

"Love it! I use MeetingResult to manage about 3-5 meetings a week. **It's critical to my success.**"
- Chaun Mikuleza, ManpowerGroup

"MeetingResult has helped me to work more efficiently, and more focused. It helps making sure there is no area that can be forgotten."
- Stephan Melchior, PM, Wilson Learning

I was looking for apps to create agendas and record meeting minutes and found the perfect combination with this app."
- Patrick Cowley, UDOT Region One

"I have had clients save up to three hours per week by using MeetingResult."
- Simon Waller, Project Management Consultant

- INTRODUCTION & OVERVIEW
- MEETNG CONTEXT & CHALLENGES
- POWERFULLY SIMPLE MEETING PROCESS
- ESSENTIAL MEETING LEADER SKILLS
- IMPLEMENTING PSM IN YOUR ORGANIZATION
- **APPENDICES**

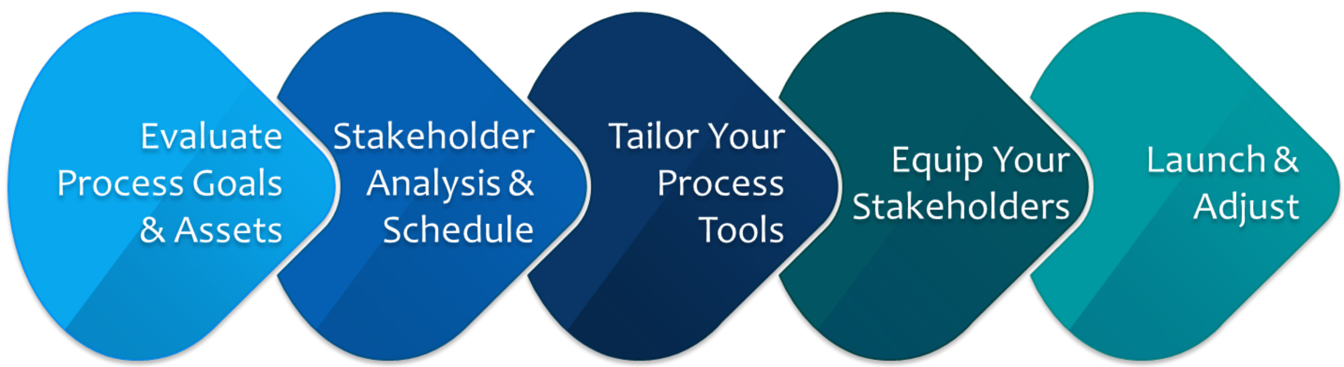
PARTICIPANT GUIDE

APPENDIX A – ADDITIONAL RESOURCES

GETTING STARTED IN YOUR ORGANIZATION

Improving meeting culture is best accomplished from the ground up, one meeting at a time. Effective meeting management is best implemented as a "grassroots" effort.

The final step is to take the fundamentals and apply them to your meetings, using a set of tools to assist you in your transition to the PSM system. Follow these steps to get started influencing the meeting practices and implementing the PSM process in your organization.



1. **Evaluate Process Goals & Assets**
   Getting started begins with an evaluation of the core business process that you support. Tailor this process to meet the needs of virtually any business process that relies on collaborative meetings to drive work forward.

   Document the overarching goal of your business process:

   Document the overall three to five objectives of the meetings that support this process:

2. **Stakeholder Analysis & Schedule**
Evaluate who needs to participate in the meeting process to contribute towards achieving the objectives of the meeting and who needs to be informed about the outcome. Determine the meeting schedule needed to engage your stakeholders to achieve your overall meeting objectives.

Distinguish between meeting attendees and meeting subscribers for your meeting:

Meeting Attendees:

Meeting Subscribers:

Define your actual meeting schedule (e.g., weekly, bi-weekly, monthly, ad hoc) and expectations for delivering your meeting summary report to attendees and subscribers:

3. **Tailor Your Process Tools**
There are three essential tools that you need to get started running your meetings.
   - The agenda is the basic document used to communicate key information prior to the start of the meeting.
   - The meeting summary report includes your agenda and information collected via your execution dashboard and serve as the essential output delivered from each of your business meetings. It can also be used to capture meeting asset and other information during your meetings.

Sample agenda, meeting summary reports and other templates are available for download at **mtgresult.com/templates**

4. **Inform Your Stakeholders**
It is important to equip your stakeholders with the basic information they need to engage before you begin running your meetings. Dedicate a few minutes during an upcoming meeting to provide stakeholders with a brief overview of PSM and establish expectations for what they will experience with the new meeting process.

5. **Launch & Adjust**
As your process will likely need to be refined over time, set those expectations with your meeting stakeholders and allow them the opportunity to contribute to any needed adjustments. After you have executed three to five meetings, assess your progress and make any needed adjustments to your process.

Key questions to ask:

Key Question	Comments
Do we have the right stakeholders (attendees and subscribers) identified?	
Are we capturing the right meeting asset types?	
Are we effectively capturing meeting assets for inclusion in the meeting summary report?	
Do stakeholders understand the meeting process?	
Are stakeholders buying into the process?	
Is the meeting summary report being effectively utilized?	
What other adjustments would make this process better?	

TOP TEN TIPS FOR MANAGING PRODUCTIVE MEETINGS

Beyond the PSM system, the following are simple tips for running productive business meetings:

#	Tip	Comments
1	Arrive Early	Meeting leaders should strive to be the first person to arrive at the meeting. This provides time for you to ensure everything is in order and sends and important message to attendees that you are on the ball.
2	Be Prepared	Be prepared to run your meeting at least one-hour before the meeting. This provides a buffer in case something unexpected comes up. Further it doesn't evoke confidence in the attendees if the meeting leader is frantically stapling meeting material during the beginning of a meeting.
3	Attend To All The Details	Even a well-planned meeting can be overshadowed if a conference room is too small, too hot, or doesn't contain the right equipment (for example, a projector). Meeting leaders are responsible for ensuring every detail of the meeting is considered and covered.
4	Open The Line Early	If you have people calling into your meeting, open the line a few minutes early before other attendees arrive. Opening the line can often be forgotten as attendees enter the physical meeting space and the meeting leader gets distracted in conversation.
5	Start On Time	This shows respect for attendees' time and will, over time, encourage others to arrive on time for your meetings.
6	Set Meeting Expectations	Let attendees know upfront what is expected of them in the meeting. Do you expect attendees to stay off their email? Do you expect full participation in the meeting dialogue? Whatever it is, let them know.
7	Watch Your Start	The first 10-15 minutes of a one-hour meeting is typically the most wasteful. This is where much of the chitchat and socializing can occur. This also contributes to attendees arrive late. Pay attention to the beginning of your meetings to ensure you get attendees focused fast.
8	Manage Side Bar Conversations	Nip the sidebar conversations in the bud. Simple ask attendees to hold their sidebar conversations to avoid distracting other meeting attendees. It the discussion is urgent, invite attendees to share with the team.
9	Schedule Appropriately	Don't over pad your meeting time unnecessarily (e.g. don't schedule a 90-minute meeting if you think you can get be completed in an hour). Padding meeting time can lead to wasted productivity as the dialogue expands to fill the meeting time. Error on the side of being aggressive.
10	End On Time (or Early)	Ending on time shows respect for attendees' time. It also reinforces your organization skills and professionalism to get the job done on time.

TOP TEN TIPS FOR RUNNING GREAT CONFERENCE CALLS

Beyond the PSM system, the following are simple tips for running productive conference calls:

#	Tip	Comments
1	Know Your Tools	As a meeting leader you need to know the ins and outs of leveraging your conference call service or on-line meeting service.
2	Keep The Meeting Short	The longer a conference all runs the more likely you are to lose attendee attention. Conference calls need to be kept as short as possible. If it's not possible to keep it short, consider regular breaks to allow attendees to refocus and manage other priorities (e.g. email)
3	Use A Land Line	Leading a conference call or webinar from a cell phone is inviting trouble. Wherever possible it's important to run your call from a landline.
4	Prepare For The Worst	You need to have a backup plan. If you happen to be on a mobile phone and it fails, what's your back up plan? Make sure you have someone on point to cover for you in the event of a technical issue.
5	Mute Your Lines	Always remind people to mute their lines at the beginning of each call. Even the smartest most conscientious people forget to mute their lines and cause distracting background noise.
6	Mute All Lines	Always know how to mute all lines centrally. Even if you remind your attendees there always seems to be a few who have a hard time following directions. Your back up plan is to mute all lines which is a feature available with most all conference all services.
7	Beeps Or No Beeps	Do you really want beeps every time someone enters or exits a call? If not, turn it off. Otherwise this can become very distracting in large meetings with attendees continually joining and dropping.
8	Check In With Callers	Regularly check in with attendees on the phone (either individually or collectively) to help them stay engaged and on their toes (e.g. Are there any questions on the phone? Mike are you tracking with us here? Is there anything else you want to add?).
9	Leverage Verbal Cues	Conference calls and standard webinars provide little if any opportunity for eye contact or physical gestures (e.g. head nodding, smile). Meeting leaders should emphasize verbal cues (e.g. "OK", "yes", "got it") to accommodate for the limitations of the medium.
10	Use Visual Aids Whenever Possible	Whenever possible meeting leaders should leverage a presentation, document, agenda or some other visual aid for attendees to be able to follow along. This helps to avoid the inevitable distraction inherent in pure audio conference calls.

EXAMPLE MEETING AGENDA

Sample Meeting Agenda - BD&PA
Meeting Agenda

Boston Development & Planning Agency	Conference Room ABC
Jul 31, 2017	1:00 PM - 2:00 PM EDT

Invited
Bryan Field, Peter Kidd, Kristin Talastas, Jennifer Wood and Trent Woodward

Objective
- Objective One: this is where we would outline a key objective for the meeting
- Objective Two: this is where we would outline a second objective for the meeting
- Objective Three: this is where we would outline a third objective for the meeting

Agenda

Agenda Item	Lead	Est. Time
• Meeting Objective & Agenda	Peter Kidd	15
• Project Schedule Walk Through	Bryan Field	15
• Project Change Management Plan Review	Kristin Talastas	15
• Meeting Wrap Up & Alignment	Peter Kidd	10
• Training Update	Bryan Field	5
	Total Estimated Time	60

EXAMPLE MEETING SUMMARY REPORT (PAGE 1)

Sample Meeting Agenda - BD&PA
Meeting Summary Report

Boston Development & Planning Agency	Conference Room ABC
Jul 31, 2017	1:00 PM - 2:00 PM EDT

Attended
Bryan Field, Peter Kidd, Kristin Talastas, Jennifer Wood and Trent Woodward

Objective
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√ Project Change Management Plan Review	Kristin Talastas	15
√ Meeting Wrap Up & Alignment	Peter Kidd	10
√ Training Update	Bryan Field	5
	Total Estimated Time	60

EXAMPLE MEETING SUMMARY REPORT (PAGE 2)

Sample Meeting Summary Report - BD&PA

Notes	
#	Description
1	Project schedule remains in 'green' status meaning no critical deliverable are past due
2	The Chief Financial Officer will be hosting an open forum on 9/7 and wants our team prepared to address any questions that come up from the audience.
3	The approval board has rescheduled their meeting from 9/22 to 9/29 so we have one additional week to prepare materials for final presentation.

Action Items			
#	Description	Owner	Due Dt
1	Bryan agreed to brief the finance team (i.e. Kim Hines) on the training costs to ensure we have sufficient budget to perform all planned classes, and will report back to us at the next project team meeting.	Bryan Field	08/04/2017

Decisions		
#	Title	Description
1	Virtual Training	The team decided that virtual training (vs. live in-person training) is acceptable to those in remote office locations. Rather than incurring the additional travel costs we will tailor the existing training so that it can be delivered through a series of virtual webinars.

Issues Identified				
#	Issue Name/Description	Severity	Owner	Resolve Dt
1	Software Incompatible - The software chosen for the collaboration hub is not compatible with our Microsoft Office suite of tools. We have to find a work around otherwise we will not be able to deliver the functionality we committed to in the design document.	Medium	Bryan Field	07/31/2017

Risks Identified					
#	Risk Event	Owner	Probability	Impact	Risk Dt
1	Training Resource Availability	Jennifer Wood	Medium	Medium	07/31/2017

POWERFULLY SIMPLE MEETINGS TECHNOLOGY PLATFORM (MEETINGRESULT)

The PSM components can be performed by a meeting leader using a manual process or tool. However, technology unlocks exponentially greater efficiencies than are otherwise unattainable using manual processes. The MeetingResult platform automates and streamlines much of the meeting process.

1. **Efficient Meeting Data Capture:** Provides for efficient planning; critical meeting information capture and distribution; and archival of meeting agenda information, meeting assets, and meeting summary reports.
2. **Streamline Follow-Up Activities:** Makes it easy to handle follow-up activities by automating the tasks.
3. **Automated Reporting/Analytics:** Automatically uses data in the system to drive reporting and analytics.
4. **Social Collaboration Hub:** Provides for collaboration and communication before, during, and after the actual time spent in the meeting room.

MeetingResult software enables meeting leaders to:

- Automate Planning & Agenda Distribution
- Easily Capture Meeting Assets
- Automate Email Notifications
- Review Meeting Performance Metrics
- Quickly Track Attendance
- Quickly Distribute Meeting Summary Reports
- Streamline Status Updates

Please contact Bryan Field at bfield@meetingresult.com for more information on MeetingResult technology or to schedule a live demonstration.

APPENDIX B – MEETING ASSET DEVELOPMENT EXERCISE

Asset Exercise: Developing Your Meeting Asset Model

Overview: Developing your Meeting Asset model is an important part of managing Powerfully Simple Meetings (PSM). This exercise will help you identify the key assets that emerge in your meetings and the additional information you'll need to collect in the process.

Instructions: Individually work through the three steps outlined below to create your Meeting Asset model. Once completed share your asset model with stakeholders in your organization to get feedback and adjust as necessary.

Key Points: You don't have to over think this process, but it's important to be as clear as possible about what you're looking to capture during your meeting process.

Step One – Identify Your Meeting Type and Business Processes They Support

Identify the predominant type of meeting for which you'll create an asset model and the business processes that those meetings support. For example, this could be your staff meeting, a project team meeting, an executive steering committee meeting, etc. As you think about the types of meetings you conduct, take a moment to go through each of these questions. For this exercise we are going to focus on the main type of meetings that you conduct. You can repeat this exercise for other types of meetings you conduct to tailor your asset model for those meetings. Your answers to these questions will help you to identify your asset model in step 2.

Identify The Business Process		
1	What types of outcomes from my meetings are important to document?	
2	What expertise should be extracted from my meeting attendees?	
3	What type of information should be shared with my meeting attendees and other stakeholders (e.g. subscribers)	
4	What types of assignments or tasks commonly surface in my meetings?	

Step Two – Create Your Asset Model:

As you review your answers to your questions above, you may see patterns emerge on the most essential content produced in your meetings. These are your meeting assets.

A. Review the answers to your questions above as well as your past meeting experience. In the table below list the meeting assets that surface in your meetings[1].

B. Once you've determined your meeting assets, the final step is to consider the attributes related to each asset. Remember, clarity is key. Even relatively skilled meeting leaders can forget to capture the attributes that allow us to fully utilize an asset (e.g. a due date for an action item). Take a moment and capture your asset attributes in the table below.

#	Asset	Attribute 1	Attribute 2	Attribute 3	Attribute 4	Attribute 5
1	*Action Items*	*Description*	*Owner(s)*	*Due Date*	*N/A*	*N/A*
2						
3						
4						
5						
6						

[1] As a general rule, most meetings typically surface between four and eight different asset types. Therefore, if you've identified more than eight to ten different types of assets, you may be too granular in your approach and might consider grouping assets at a higher level.

APPENDIX C – QUESTIONING EXERCISE

Questioning Exercise: Leveraging the ease and power of the specificity model

Setting: The context for this exercise is a weekly project meeting in a prototypical corporate conference room with eight attendees. There's been a significant amount of confusion on this project regarding who's doing what and by when. This ambiguity has contributed to the project being behind schedule, which has led to the team scheduling even more meetings to deal with the confusion. You decide to leverage the specificity model to ensure there is minimal ambiguity coming out of this meeting.

Instructions: This exercise has three rounds of ambiguous comment that require clarification. In each round read the attendee's comment and decide what specifying question you will ask to clarify the comment. Write the specifying question in the space provided next to each attendee comment. Work through all three rounds to complete the exercise. We have provided information from the specifying question section below to help you identify the most appropriate question to ask to drive the clarity that is required.

Key Points: Keep in mind that not every ambiguous comment in a meeting needs to be specified. The goal is for meeting leaders to quickly recognize risky ambiguity and remove it whenever necessary.

In a meeting context we focus on specifying questions in three primary instances: Unspecified nouns, actions, and timing. While there are multiple ways to dig for clarity in each instance, a simple model includes the use of an interrogative pronoun (i.e., who, what, how, when) followed by the word "specifically".

Unspecified Nouns Examples:
For example: "OK, I'll have them set it up and have that over to you later next week." It is not entirely clear who "them" is and what "it" is. To remedy this, the question could be, "Who specifically is going to set it up"? Another question could be, "What specifically are they setting up"?

Unspecified Actions Examples:
For example: "My team will knock it out next week". Perhaps you know what they mean by "knock it out" or you may want to clarify by responding, "How specifically are you going to knock it out?"
Consider another example: "We'll have the training room ready to go when the executive team arrives next week." Again, you may know what "ready" means, or you may need to clarify by asking, "How specifically will you ensure it will be ready?"

Unspecified Timing Examples:

For example: "We should have that done by early spring." If needed, the ready response to this is, "When specifically, in the spring do you estimate having that done?"

Round One:

#	Attendee Comment	Specifying Question You Would Use to Clarify The Attendee Comment
1	OK great, I'll make sure that we get that done later this month.	
2	We'll have everything ready by the time the CFO returns.	
3	Finance is responsible for getting that deliverable to us on time.	
4	I had a tuna sandwich for lunch yesterday.	
5	We won't be able to deliver that project until later in the spring.	
6	The problem is that they haven't produced the technical specs.	
7	My office has been so cold this winter.	
8	OK we'll make sure to get that completed ASAP.	

Round Two:

#	Attendee Comment	Specifying Question You Would Use To Clarify The Attendee Comment
1	Legal is accountable for reviewing the documents and performing a final review.	
2	Lisa and Mike will have all the project documentation completed by the end of this week.	
3	OK great, that should be completed before too long?	
4	I spilled coffee on my shirt and had to go home and change.	
5	They're going to review the contract and make sure we have it in time.	
6	OK I'll put some documents together and get them over by next Tuesday at 12:00pm.	
7	We need to have that delivered by the end of the summer if we're going to have it ready in time.	
8	They're going to review the contract and make sure we have it this week.	

Round Three:

#	Attendee Comment	Specifying Question You Would Use To Clarify The Attendee Comment
1	Once the SharePoint site is available everyone will have the access they need.	
2	That's no problem; we should have that completed within the next couple of weeks.	
3	They will have all the project documentation completed by the end of this week.	
4	I'm getting new carpet in my office later this year.	
5	The client wants our key senior executives to be present in the meeting on Tuesday.	
6	Let's make sure the project charter is completed by the Holidays to avoid confusion.	
7	We're getting a new copy machine on the eighth floor.	
8	They will have all the project documentation completed by the end of this week.	

APPENDIX D – SUMMARIZING EXERCISE

Summarizing Exercise: Leveraging comment and conversational summarizing

Setting: The context for this exercise is a weekly project meeting in a prototypical corporate conference room with eight attendees. Your meetings have improved considerably by leveraging your listening and questioning skills, but there is still a great opportunity to ensure greater alignment on the dialogue and outcomes of your meetings. You decide to leverage the power of summarizing to ensure there is even greater clarity and alignment on your meeting outcomes.

Instructions: This exercise has three rounds of comments and conversations that require summarizing. In each round read the comments and conversations and summarize them without losing the details and spirit of what was being communicated. For the comments simply write the summary in the space provided to the right of each comment. For the conversations summarize them in the space provided to the right using the bullet approach that we discussed earlier in the course. Work through all three rounds to complete the exercise. We have provided information from the summarizing section of the course below to assist with developing your comment and conversational summaries.

Key Point: Active listening is essential to effective summarizing. The goal is to remove superfluous commentary and summarize the bottom line. This provides the attendee with an opportunity to validate, or further clarify. In the real world not every comment or conversation needs to be summarized; it's up to the meeting leader to determine the content that requires summarizing to ensure clarity and alignment.

Comment Summarizing: Comment summarizing takes place to ensure attendees have correctly understood what the stakeholder intends to communicate. By extracting the extraneous information, the meeting leader is able to play back the parts that are most relevant to the content of the meeting.

Comment Summarizing Model

1. Acknowledge: "Ok", "Got it", or "Understood"
2. Summarize: Shorten and playback comment
3. Confirm: Listen for confirmation or correction

Conversational Summarizing: Conversational summarizing should happen at various points within a meeting. It is more of an art than a science, and there is no exact formula of when to summarize a conversation. A general rule of thumb is that a conversational summary should occur after each significant agenda item or collection of each meeting asset.

Conversational Summarizing Model

1. Interject: "So in summary *what I'm hearing is*"
2. Summarize: Shorten and "bullet" conversation
3. Ask: "Is that accurate?", or "Did I get that right?"
4. Confirm: Listen for confirmation or correction

Round One:

#	Meeting Attendee Comment	Your Recommended Summary
	Round One: Comment Summarizing	
1	A1: There is no risk to delaying the upgrade project because we still have the support of the vendor for at least another year while we evaluate new software. Even if we didn't, they would still probably support us anyway. Besides we're unlikely to make much progress this year anyway with everything else we have going on.	
2	A2: My team will have the proposal drafted by the end of the month. Janet can provide her comments once she gets back from her vacation. She's in the Bahamas with her husband and family on a Scuba diving trip. Apparently, she's a skilled diver and has been all over the world on Scuba adventures.	
3	A1: We've been through this over and over again. Trish and Michael are going to review the contract and make sure they get it back to me by Tuesday. The last time they missed their deadline but that was an anomaly. They're usually very reliable and I trust that it will be done on time.	
4	A2: I have a doctor's appointment on Tuesday morning in Atlanta but that shouldn't make any difference. I'll have the invoice prepared and sent to the client by Tuesday at 12:00pm. The worst-case scenario is that I have to drive to work that day and skip my carpool, which is not a problem for me and shouldn't be a problem for the others.	
	Round One Continued: Conversational Summarizing	
5	A1: The division HR teams are ultimately responsible for the implementation of the incentive plan changes. A2: I understand but the Communications team is responsible for developing the materials that HR will review with the business. A1: I agree, so when do the Communication materials need to be completed. A2: We need them by May 31st at the latest. Can you get that done?	

	A1: Yes.	
6	A1: The bottom line is that I'll have the code fix in production by the end of the day tomorrow. A2: We're not going to be able to migrate the code because Wes is on vacation and he has to have the final approval on all changes. A1: I didn't realize he was on vacation. Where did he go? A2: He's in New York visiting his mom and sister. A1: When is he going to be back in the office? A2: Thursday night. A1: OK then Friday morning it is.	

Round Two:

#	Attendee Comment	Your Recommended Summary
Round Two: Comment Summarizing		
1	A1: We've been waiting for days and days to get everyone the access they need. I think I submitted the security form over two weeks ago. Can you believe how long it takes to get things done around here? If the SharePoint site is not available by Monday morning, we won't be able to complete our testing and we'll miss our implementation deadline.	
2	A2: I met with Ellen to review the budget and plan for the next six months. She had quite a few questions, especially regarding the increase in overhead expenses, but she made the decision and we now have approval to hire a full-time project manager immediately. I hope this works out because I don't want to have to go back to Ellen for more resources.	
3	A1: We've been in discussions with the client over the past week. I don't know if you've had any experience with that team, but they have the hardest time making decisions. Finally, they came to the conclusion that they only want our CFO and COO to attend the meeting with their CEO. My friend used to work for their CEO and apparently he's a major jerk.	
4	A2: I recently saw the results of our survey and it's clear that our employee engagement scores are declining. We clearly need to implement a teleworking policy to address employee concerns on work/life balance. I know I spend at least two hours a day commuting and it's only getting worse. Yesterday it took me an hour and forty-five minutes to get home from the office. At that rate I'll be commuting over seventeen hours a week. Something has to give before everyone quits and goes to work for another company that allows employees to work from home.	

Round Two Continued: Conversational Summarizing		
5	A1: We need the HR team to do a quality control on all of the performance objectives entered into the system. A2: That's not possible. We're not staffed to review hundreds of different performance objectives in the span of one week. A1: Well somebody needs to ensure we have consistency across the business. A2: I agree we should, but we've never done it before and we're not staffed to do it now. A1: Could your team review a sampling of the objectives to assess the quality? Say 10%? A2: I think a sampling is a reasonable approach. I'll develop a recommended approach, including the sampling percentage and report back to the team next Wednesday. A1: Thank you. That will be such a tremendous improvement.	
6	A1: OK so it's clear to me that we need to amend our contract language to reflect a charge if our clients terminate the contract early. A2: I agree. The question is how much we should charge them for the termination. A1: Well we don't know exactly what our direct competitors are doing, but the industry standard is a 5% surcharge for premature contract terminations. A2: OK then let's go with 5% and see what kind of reaction we get as we sell new business. A1: That sounds like a good decision. A2: But wait a minute. If we charge 5% and our competitors only charge 3% then aren't we putting ourselves at a significant disadvantage if we're competing side by side? I think the better way to approach it is to start at 3% until we know for certain what the competition is doing. Then we can adjust for contracts moving forward. A1: My strategy team can take the action to obtain the competitor intelligence on the rates they charge. It may take us three or four months before we have that information. A2: That works. Decision made.	

Round Three:

#	Attendee Comment	Your Recommended Summary
Round Three: Comment Summarizing		
1	A1: That's no problem I can have the communication plan developed and reviewed by the end of the month, so we can begin executing the change. The last time we did something like this it was such a nightmare because Stephanie on the HR team tried to do her own communication planning and writing. We can't let that happen again or we are all in for a rude awakening.	
2	A2: Our estimate is that we need $50K in order to improve our social media presence. This will cover the costs for the development of a strategy and branding for Facebook, Twitter and Instagram. Right now, we are just flying by the seat of our pants in the area of social media and it is causing problems. Have you seen what people are saying about our service on Twitter? It's not pretty, and right now we have no way to get out in front of this. All we do is issue press releases.	
3	A1: We've sold so much new business that the number of projects coming our way is incredible. The problem is that we're not staffed to complete all of the work in such aggressive timeframes. Our developers are already working nearly seventy hours a week and morale is suffering. We have to talk to Bill in the morning and let him know that we need three new java developers. Bill's a reasonable guy and I'm pretty sure we can get his support.	
4	A2: I don't think we should move forward with outsourcing the data center. It just doesn't make business sense. I understand that the vendor came in with a great cost model, but there is simply too much risk in giving up control at this point in time. Plus, we have no guarantees that their cost isn't going to skyrocket next year. To me this is a no-brainer decision. We'll be much better off managing this in house.	

Round Three Continued: Conversational Summarizing		
5	A1: We received approval to move forward with a pilot of the new teleworking policy. If all works out we will be able to roll it out to the entire organization next March. A2: How many divisions are participating in the pilot? A1: We're thinking three. HR, Legal and possibly Finance. A2: When will the pilot run? A1: December through February. A2: That overlaps with the year-end financial close process. I don't see how Finance can participate in that pilot while they're in the middle of closing the books. I think we're going to need to target another division. A1: How about IT, they've expressed a lot of interest over the past several months. A2: IT is perfect; the division head has been supportive of other flexible work arrangements. A1: That sounds like a plan.	
6	A1: We have at least a dozen enhancement requests from customers that haven't been completed, so we're considering hiring a summer intern to help make some progress. A2: Do you think an intern will really help? A1: We don't have the budget to hire a more experienced consultant and we had great success with the intern we hired last summer. A2: Grace was great, but I wonder if we'll be so lucky this year. A1: Well if we don't implement these enhancements by the end of July, our clients are going to be unhappy, so we need to do something. A1: What if I ask Tim to reach back out to Grace directly and see if she'd want to do some work for us? Even 20 hours a week would be great. Then we could also hire another intern that could help as well. Even if they're not as good as Grace we should be OK. A2: Excellent idea. Let's do it.	

APPENDIX E – REDIRECTING EXERCISE

Redirecting Exercise: Leveraging redirects to keep your meetings flowing

Setting: The context for this exercise is a weekly project meeting in a typical corporate conference room with eight attendees. There's been a history of attendees getting off course and devoting a significant amount of time to topics that aren't relevant to the broader group. This issue has contributed to lengthy meetings that don't accomplish their objectives – and this leads to the need to schedule more meetings! You decide to leverage your knowledge of redirecting to make sure your meetings stay on track and accomplish their objectives.

Instructions: This exercise has four rounds of conversations that require redirecting. In each round read the through the conversations and determine the redirecting tactic that is most appropriate given the nature of the dialogue. Once you have identified the most appropriate redirect to use write what you would say to implement the redirecting tactic in the space provided to the right of the conversation that you are redirecting. Work through all three rounds to complete the exercise. We have provided information from the redirecting section of the course below to assist with developing your recommended redirecting statement.

Key Point: The type of redirect you choose can vary on the situation and the culture of the organization. Choose a redirect that is most comfortable for you. The most important thing is that you interrupt the wayward conversation and get attendees back on track.

Round One:

#	Attendee Dialogue	Your Recommended Redirect
1	A1: We've been down this road at least a hundred times; we will never get the funding for the upgrade unless we develop a business case. A2: I understand that, but we will never be able to develop the business case unless we get the funding we need to do it correctly. A1: Right, but we won't get the funding without the business case. A2: But how am I supposed to develop the business case when I don't have the resources I need? A1: The problem is that we won't get the funding without the business case. A2: I understand that, but we will never be able to develop the business case unless we get the funding we need to do it correctly.	

Round Two:

#	Attendee Dialogue	Your Recommended Redirect
2	A1: OK, so we have a final decision. We'll postpose the implementation until May of 2016. A2: I think that's clearly the right decision to make. A1: Well we did our analysis and there was no other logical decision we could make. A2: I completely agree. A1: We looked at all the other options available and moving to May of next year was really the only way to go. A2: I agree that was the right call. A1: No matter how you look at it, we're doing the right thing. A2: Agreed. A1: If we didn't make that decision, I can't imagine what else we would have done. A2: There really was no other choice. A1: No matter how you look at it, there was only one decision to make. A2: I completely agree.	

Round Three:

#	Attendee Dialogue	Your Recommended Redirect
3	*Note: the focus on this agenda item dialogue is to provide a status on the implementation of an enterprise financial software system.* A1: The biggest issue we face is that our resources are tied up supporting problems with the current system as well as preparing for the new implementation. A2: We'll if IT would get their act together then we wouldn't have so many issues with the current system and we'd be able to move on, once and for all. A1: I don't understand the problem with the IT team. Ever since Scott took over the division their service levels have gone down the tubes. A2: Apparently the only reason Scott got the job was because he went to graduate school with the CEO. A1: So did Shelia, which is why she got the job in Human Resources, even though she has no experience in HR. A2: Well this issue with HR is another story. Did you hear the results of the recent engagement survey? A1: Please tell me, how bad is it? A2: I'm not sure that I should share, it's still confidential at this point.	

Round Four:

#	Attendee Dialogue	Your Recommended Redirect
4	*Inform the Meeting Leader that after the redirect above, these same two attendees continue their dialogue.* A1: Well the bottom line is that we don't have enough resources to do the work. A2: This is the same thing that happens on almost all of our projects. A1: If we don't have the resources we're not going to be successful. Someone has to raise this to the Steering Committee. A2: I think we all agree with you on that point. A1: Think about it, if we don't have the resources how can we get all of the work done. A2: You simply can't get all of the work done in time. A1: Without the resources, we can't be successful. A2: How can we implement successfully, without the resources.	