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ARTICLE **LEADING TEAMS**

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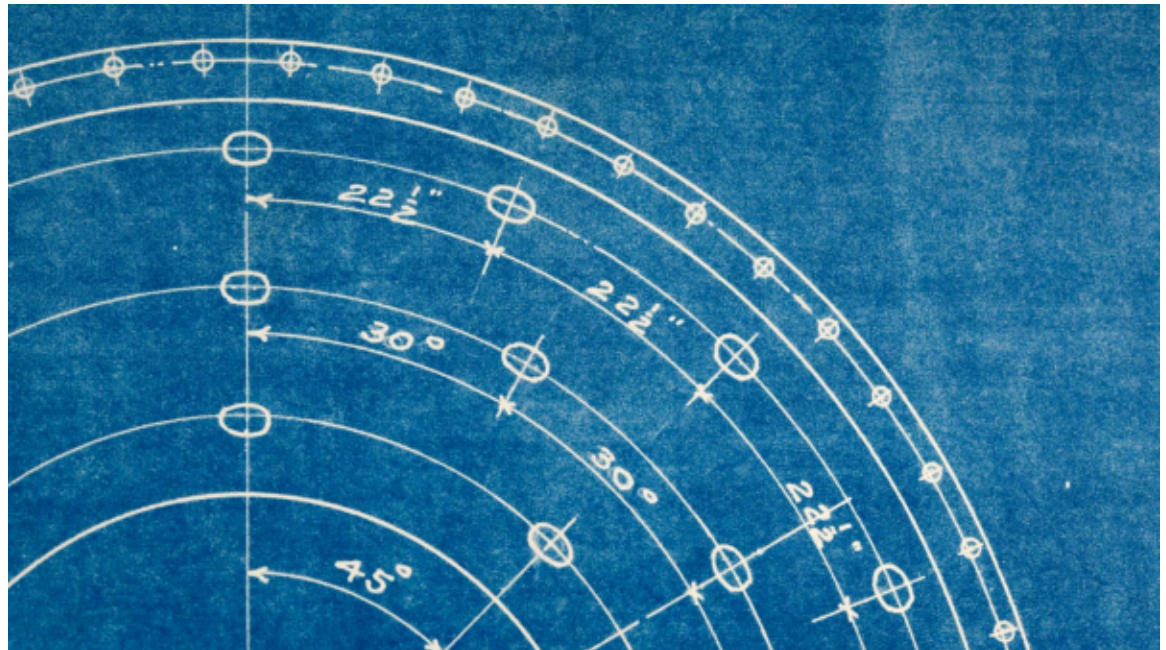
by Roger Schwarz

LEADING TEAMS

How to Design an Agenda for an Effective Meeting

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We've all been in meetings where participants are unprepared, people veer off-track, and the topics discussed are a waste of the team's time. These problems — and others like it — stem from poor agenda design. An effective agenda sets clear expectations for what needs to occur before and during a meeting. It helps team members prepare, allocates time wisely, quickly gets everyone on the same topic, and identifies when the discussion is complete. If problems still occur during the meeting, a well-designed agenda increases the team's ability to effectively and quickly address them.

Here are some tips for designing an effective agenda for your next meeting, with a sample agenda and template below. You can use these tips whether a meeting lasts an hour or three days and whether you're meeting with a group of five or forty:

Seek input from team members. If you want your team to be engaged in meetings, make sure the agenda includes items that reflect their needs. Ask team members to suggest agenda items along with a reason why each item needs to be addressed in a team setting. If you ultimately decide not to include an item, be accountable — explain your reasoning to the team member who suggested it.

Select topics that affect the entire team. Team meeting time is expensive and difficult to schedule. It should mainly be used to discuss and make decisions on issues that affect the whole team — and need the whole team to solve them. These are often ones in which individuals must coordinate their actions because their parts of the organization are interdependent. They are also likely to be issues for which people have different information and needs. Examples might include: How do we best allocate shared resources? How do we reduce response time? If the team isn't spending most of the meeting talking about interdependent issues, members will disengage and ultimately not attend.

List agenda topics as questions the team needs to answer. Most agenda topics are simply several words strung together to form a phrase, for example: "office space reallocation." This leaves meeting participants wondering, "What about office space reallocation?" When you list a topic as a question (or questions) to be answered, it instead reads like this: "Under what conditions, if any, should we reallocate office space?"

A question enables team members to better prepare for the discussion and to monitor whether their own and others' comments are on track. During the meeting, anyone who thinks a comment is off-track can say something like, "I'm not seeing how your comment relates to the question we're trying to answer. Can you help me understand the connection?" Finally, the team knows that when the question has been answered, the discussion is complete.

Note whether the purpose of the topic is to share information, seek input for a decision, or make a decision. It's difficult for team members to participate effectively if they don't know whether to simply listen, give their input, or be part of the decision making process. If people think they are involved in making a decision, but you simply want their input, everyone is likely to feel frustrated by the end of the conversation. Updates are better distributed — and read — prior to the meeting, using a brief part of the meeting to answer participants' questions. If the purpose is to make a decision, state the decision-making rule. If you are the formal leader, at the beginning of the agenda item you might say, "If possible, I want us to make this decision by consensus. That means that everyone can support and implement the decision given their roles on the team. If we're not able to reach consensus after an hour of discussion, I'll reserve the right to make the decision based on the conversation we've had. I'll tell you my decision and my reasoning for making it."

Estimate a realistic amount of time for each topic. This serves two purposes. First, it requires you to do the math — to calculate how much time the team will need for introducing the topic, answering questions, resolving different points of view, generating potential solutions, and agreeing on the action items that follow from discussion and decisions. Leaders typically underestimate the amount of time needed. If there are ten people in your meeting and you have allocated ten minutes to decide under what conditions, if any, you will reallocate office space, you have probably underestimated the time. By doing some simple math, you would realize that the team would have to reach a decision immediately after each of the ten members has spoken for a minute.

Second, the estimated time enables team members to either adapt their comments to fit within the allotted timeframe or to suggest that more time may be needed. The purpose of listing the time is not to stop discussion when the time has elapsed; that simply contributes to poor decision making and frustration. The purpose is to get better at allocating enough time for the team to effectively and efficiently answer the questions before it.

Propose a process for addressing each agenda item. The process identifies the steps through which the team will move together to complete the discussion or make a decision. Agreeing on a process significantly increases meeting effectiveness, yet leaders rarely do it. Unless the team has agreed on a process, members will, in good faith, participate based on their own process. You've probably seen this in action: some team members are trying to define the problem, other team members are wondering why the topic is on the agenda, and still other members are already identifying and evaluating solutions.

The process for addressing an item should appear on the written agenda. When you reach that item during the meeting, explain the process and seek agreement: "I suggest we use the following process. First, let's take about 10 minutes to get all the relevant information on the table. Second, let's take another 10 minutes to identify and agree on any assumptions we need to make. Third, we'll take another 10 minutes to identify and agree on the interests that should be met for any solution. Finally, we'll use about 15 minutes to craft a solution that ideally takes into account all the interests, and is consistent with our relevant information and assumptions. Any suggestions for improving this process?"

Specify how members should prepare for the meeting. Distribute the agenda with sufficient time before the meeting, so the team can read background materials and prepare their initial thoughts for each agenda item ahead of time.

Identify who is responsible for leading each topic. Someone other than the formal meeting leader is often responsible for leading the discussion of a particular agenda item. This person may be providing context for the topic, explaining data, or may have organizational responsibility for that area. Identifying this person next to the agenda item ensures that anyone who is responsible for leading part of the agenda knows it — and prepares for it — before the meeting.

Make the first topic “review and modify agenda as needed.” Even if you and your team have jointly developed the agenda before the meeting, take a minute to see if anything needs to be changed due to late breaking events. I once had a meeting scheduled with a senior leadership team. As we reviewed the agenda, I asked if we needed to modify anything. The CEO stated that he had just told the board of directors that he planned to resign and that we probably needed to significantly change the agenda. Not all agenda modifications are this dramatic, but by checking at the beginning of the meeting, you increase the chance that the team will use its meeting time most effectively.

End the meeting with a plus/delta. If your team meets regularly, two questions form a simple continuous improvement process: What did we do well? What do we want to do differently for the next meeting? Investing five or ten minutes will enable the team to improve performance, working relationships, and team member satisfaction. Here are some questions to consider when identifying what the team has done well and what it wants to do differently:

1. Was the agenda distributed in time for everyone to prepare?
2. How well did team members prepare for the meeting?
3. How well did we estimate the time needed for each agenda item?
4. How well did we allocate our time for decision making and discussion?
5. How well did everyone stay on-topic? How well did team members speak up when they thought someone was off-topic?
6. How effective was the process for each agenda item?

To ensure that your team follows through, review the results of the plus/delta at the beginning of the next meeting.

If you develop agendas using these tips, and the sample agenda and template below, your team will have an easier time getting — and staying — focused in meetings.

A SAMPLE MEETING AGENDA

TOPIC	PREPARATION	PROPOSED PROCESS
<p>1 What changes, if any, should we make to the agenda? TIME: 2 minutes PURPOSE: Decision LEADER: Mike</p>	None	<ul style="list-style-type: none"> Mike polls team.
<p>2 What deltas from the previous meeting will we focus on this meeting? TIME: 3 minutes PURPOSE: Decision LEADER: Anne</p>	Review applicable deltas from previous meeting notes.	<ul style="list-style-type: none"> Anne reviews areas of improvement that we agreed to focus on during this meeting.
<p>3 How do we best manage the fluctuating internal demand for our services? TIME: 50 minutes PURPOSE: Decision LEADER: Peg</p>	Identify relevant information, criteria, and assumptions that you believe should guide our decision.	<ul style="list-style-type: none"> Statement of the problem. TIME: 5 minutes Team identifies and agrees on relevant information to consider. TIME: 10 minutes Identify and agree on criteria for acceptable solutions. TIME: 10 minutes Identify and agree on assumptions. TIME: 10 minutes Craft solutions that meet the above constraints. TIME: 15 minutes
<p>4 Which firm should we select for the adjacent markets acquisition study? TIME: 15 minutes PURPOSE: Decision LEADER: Martin</p>	Read the attached memo recommending three firms. Be prepared to ask questions and share your initial preference and your reasoning.	<ul style="list-style-type: none"> Questions and additional information regarding the recommendations of the three firms. Decision to select one firm.
<p>5 What developmental assignments are available during the next FY for high-potentials? TIME: 15 minutes PURPOSE: Decision LEADER: Noah</p>	Review the attached memo identifying the current high-potential managers and the areas in which we are seeking developmental assignments for them. If feasible, be prepared to offer an appropriate developmental assignment.	<ul style="list-style-type: none"> Identify the available developmental assignments. Match the assignments to the pool of high-potential managers. Agree on next steps for any high-potential managers who have not been given a developmental assignment.
<p>6 PLUS/DELTA: What did we do well for this meeting? What should we do differently for the next meeting? TIME: 5 minutes PURPOSE: Decision LEADER: Carrie</p>	None	<ul style="list-style-type: none"> Members identify pluses and deltas. Team agrees on deltas to work on for next meeting.

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MEETING AGENDA

MEETING NAME _____

DATE _____

TIME _____

TOPIC	PREPARATION	PROPOSED PROCESS
1 TIME ALLOTTED: PURPOSE: LEADER:		
2 TIME ALLOTTED: PURPOSE: LEADER:		
3 TIME ALLOTTED: PURPOSE: LEADER:		
4 TIME ALLOTTED: PURPOSE: LEADER:		
5 TIME ALLOTTED: PURPOSE: LEADER:		

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