

## Keeping Meetings on Track

### Two Tools of the Trade

So you want to tune-up your meetings. We hear you. Our clients have said “We spend more time in meetings than we do outside of meetings,” and others have asked “Are there any tools that will improve our stressful meetings?” The two best tools are—the “Meeting Activity Report,” and the “Meeting Effectiveness Critique.”

#### **Meeting Activity Report**

The attached Meeting Activity Report might not look impressive, but if you use it properly—it will transform your meetings—guaranteed. It’s only two pages, but it packs quite a punch. In fact, it addresses all ten of the “Meeting Absolutes” in the first article (January Newsletter). Do we have your interest yet?

So how will this tool help to keep meetings on track? It’s all in its versatility. There are six main sections. The first lists the attendees, name of meeting, department, date, etc. It’s basic but needed. The second section, “Meeting Objectives,” should be discussed and agreed to at the beginning of the meeting. This will focus the meeting.

Since this tool also serves as minutes, the “Key Issues or Discussion” Section is an ideal place to capture noteworthy discussion points. It is a valuable record that provides ongoing continuity, and ready reference to past meetings. The next section, “Action Assignments,” is used to document action items. It stresses accountability.

The fourth section, “Agenda Topics for Next Meeting,” is self-explanatory. Its value is two-fold. First it provides meeting direction and continuity. Second, since the “Meeting Activity Report” should be distributed at the end of the meeting, everyone will have the agenda in advance of the next scheduled meeting. This also supports the development of Meeting Objectives.

“Meeting Review,” the last section, is a balanced critique. Meeting participants should have an opportunity to express what they liked, and what needs to improve, for the next meeting. We recommend a balanced critique during the last five minutes of each meeting—in the spirit of continual improvement.

#### **Meeting Effectiveness Critique**

Referencing the attached Meeting Effectiveness Critique, this powerful tool has only one purpose, to transform meetings—from bad to good—and from good to great. It is time-tested, and when used properly, will deliver impressive improvement. It focuses on twelve meeting attributes that collectively contribute to meeting nirvana. You doubt this? OK—here’s how.

This is a more formal approach to the “balanced critique.” We recommend that the “Meeting Effectiveness Critique” be used periodically (e.g. every 3-4 meetings), but at least once a

quarter. Our clients use it in several ways, and we're confident that you will find your own creative approaches.

Consider this. Have each participant complete the Meeting Effectiveness Critique at the end of the meeting. Next, ask each participant who rated any meeting attribute in the 1-2 range to describe why. After that is completed, look for trends. Usually discomfort issues will cluster around a few meeting attributes.

Next, explore ways to increase the effectiveness—one meeting attribute at a time. Make sure to document the recommended action on the Meeting Activity Report. You should discuss improvement in these areas (at the next meeting) during the balanced critique. This will determine if additional work is needed.

Put these tools to work, and you just might be amazed at the results. *Here's to your quest—to transform meetings—one meeting at a time.*

### **About the Author**



Stanley Cherkasky is the Managing Partner of Change Management Consulting, Inc. Founder of the firm, Stan is the principal architect of the *Performance Improvement Breakthrough*<sup>™</sup> methodology, and the *Six Sigma Lean Advantage*<sup>™</sup>—innovative and proven strategies that accelerate ROI and net income improvement, build customer loyalty, and create world-class recognition.

Stan has more than three decades of business and consulting experience, in both the private and public sectors, in the United States and abroad. Stan specializes in building high-performance teams, and working closely with senior leaders to achieve breakthrough financial, organizational, and operating improvement. He has been quoted in many business publications, including *Fortune*, *Business Week* and the *Wall Street Journal*.

### **About Change Management Consulting, Inc. (CMC)**

Founded in 1993, Change Management Consulting is a global management consulting and training company, dedicated to helping organizations of all sizes improve performance, achieve goals and advance leadership capability. As a full-service organizational improvement firm, CMC focuses on organizational and leadership development, compliance management (ISO 9001 and its derivatives), strategic planning and Lean Six Sigma initiatives.

Headquartered in Wayne, NJ with offices in San Diego, Dallas and Detroit, CMC has a proven track record in helping public and private sector clients implement pragmatic continual improvement initiatives that drive financially measurable results. CMC also has extensive experience in obtaining grants and funding assistance for its clients. Learn more at [www.cmc-changemanagement.com](http://www.cmc-changemanagement.com) or contact CMC at (877) 268-2440 or (973) 696-7878.

# *Change Management Consulting, Inc. (CMC)*

## **Meeting Activity Report**

Meeting: \_\_\_\_\_

Leader: \_\_\_\_\_ Department: \_\_\_\_\_

Date: \_\_\_\_\_ Start: \_\_\_\_\_ End: \_\_\_\_\_

Attendees: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### **Meeting Objectives:**

1. \_\_\_\_\_

\_\_\_\_\_

2. \_\_\_\_\_

\_\_\_\_\_

3. \_\_\_\_\_

\_\_\_\_\_

### **Key Issues or Discussion:**

\_\_\_\_\_

\_\_\_\_\_

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\_\_\_\_\_

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# *Change Management Consulting, Inc. (CMC)*

## **Meeting Activity Report (Cont.)**

### **Action Assignments:**

Action Required	Person Responsible	Est. Comp. Date	Completed

### **Agenda Topics for Next Meeting:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### **Meeting Review:**

Strengths

Weaknesses

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### **Next Meeting:**

Date: \_\_\_\_\_ Time: \_\_\_\_\_ Location: \_\_\_\_\_

# Change Management Consulting, Inc. (CMC)

## Meeting Effectiveness Critique

**Directions:** There are two sets of words for each meeting attribute. The first set describes the “negative” (1-2 rating), and the second set depicts the “positive” (4-5 rating). Circle a number (from 1 to 5) to indicate your estimation of the effectiveness of each meeting attribute that applies to your meeting.

**Scale:**                    **Ineffective/Poor — 1 2 3 4 5 — Effective/Excellent**

### Meeting Attributes:

1. <b>Climate:</b>	Indifference, boredom;	Involvement, interest	1	2	3	4	5
2. <b>Discussion:</b>	Unbalanced, irrelevant;	Inclusive, relevant	1	2	3	4	5
3. <b>Goals:</b>	Unclear, conflicting;	Understood, accepted	1	2	3	4	5
4. <b>Listening:</b>	Ideas ignored;	Ideas explored	1	2	3	4	5
5. <b>Disagreement:</b>	Suppresses conflict;	Acceptance of conflict	1	2	3	4	5
6. <b>Consensus:</b>	Little discussion;	Meaningful discussion	1	2	3	4	5
7. <b>Criticism:</b>	Personal attacks;	Non-threatening	1	2	3	4	5
8. <b>Candor:</b>	Hidden feelings;	Expression of feelings	1	2	3	4	5
9. <b>Action Plan:</b>	Lack of commitment;	Accepted assignments	1	2	3	4	5
10. <b>Leadership:</b>	Autocratic, arbitrary;	Democratic, thoughtful	1	2	3	4	5
11. <b>Talk Freedom:</b>	Inhibited & limited;	Open and trusting	1	2	3	4	5
12. <b>Assignments:</b>	No documented tasks;	Assignments documented	1	2	3	4	5

*Note: Circled items in the 1-2 area may require immediate attention to improve meeting effectiveness.*