PRODUCTIVE MEETINGS WITH IT: 6 THINGS THAT WORK IN A HYBRID WORLD

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As a business grows, productive meetings become essential for working through challenges, helping to ensure policies align with the company's vision, and keeping people focused on solving problems together. Leadership meetings, one-on-ones, team and departmental meetings, cross-team meetings… they all play a key role in getting things done. However, most companies do not run meetings as effectively as they would like. And that's a problem.

With meetings being so vital to high performance, no organization can afford to spend time in ineffective meetings or have people skip meetings because they don't think they matter.

Fortunately, improving the cadence and content of meetings is not hard to do, and technology can help you make this happen. It's easy to see the impact of technology on meetings in today's hybrid work environment. Still, even if all your employees are in the office, technology can boost meeting productivity, efficiency, and outcomes.

Because IT is at the core of everything we do at JMARK, we have become very good at using technology to boost meeting effectiveness. However, it's important to be able to have good meetings regardless of technology. For that reason, I want to share six things that have worked for us in hopes they might provide a little help in your organization's meetings.

ONE QUICK NOTE: JMARK uses the Entrepreneur's Operating System [EOS] methodology, which you can learn about here. Some of the following concepts, descriptions, and references come from the EOS.

1. Establish a common language and ground rules.

This helps to ensure the entire organization is using the right words and everyone is on the same page, as well as clarifying expectations for the meeting and any follow-ups. Below are some of the phrases we commonly use at JMARK and their meanings:

- *Segue:* Introduction to the meeting, when each person shares a personal win and a business win since the last meeting.
- *Sideline:* An issue or topic that can be discussed between a smaller group of people afterward so that the larger group can stay on focus.

- *IDS:* This is an EOS term that means to "*identify, discuss, and solve*" an issue that needs resolution or discussion.

  i. *Types of issues:* We find that issues usually fall into one of three categories based on the next action that is needed:

  1. *Inform:* This will take more time than allocated in the prior sections of the agenda, but there is important information that needs to be shared with the team.
  2. *Input:* This is an issue that will be decided within a particular team, but there is a need for input from the larger group first.
  3. *Fix:* This is the primary type of issue for which we utilize IDS to identify and understand, discuss, and solve a problem.

- *Types of decisions:* First, it is important to know that not everyone is going to agree with every decision. However, once the decision is made, everyone in the team or group needs to support the decision. With the help of Dan Sedor with Leadership Resources, we have established four types of decisions consistently needing to be made at JMARK. You may find additional types for your organization. These are ours:
    i. *Consensus:* An issue that the responsible group must discuss until there is overall agreement on the decision. This may be based on a majority (rather than unanimity), but ultimately, everyone should agree on the path forward.
    ii. *Command:* A single person owns the decision and is ready to make it but wants to discuss it with the group before the final decision is solidified.
    iii. *Consultative:* Similar to a command, a single person owns the decision, but in this case, that person does not have enough information to make the call and is consulting with the group to gather that information first.
    iv. *Delegated:* One person owns the decision, but the decision is delegated to another party because of circumstances, execution, or proximity to better knowledge. For example, a department head may delegate a decision to a team lead because that person will have to deal with communicating the decision to the organization.

- *Cascading messages:* As a result of the meeting and/or decision, communication needs to go from the meeting participants to others. The cascading messages establish what will be communicated from the meeting, to whom, and who is responsible for that communication.
- *Confidentiality:* Our default mode is that anything discussed in a meeting is not to be communicated outside the meeting unless it is identified as a cascading message. That way, people feel safe sharing their thoughts and opinions.
- *Meeting leader:* The person responsible for keeping the meeting on track and pushing through the agenda to achieve the desired outcome. They are also responsible for starting and ending on time. (See more on the meeting leader below.)
- *Meeting scribe:* The person responsible for taking notes, capturing action items, and assigning to-dos at the end. This allows the meeting leader to stay focused.
- *Electronics by exception:* This is a hard one, but helpful. While we use computers to run and track the meeting, email should be closed. Mobile devices, phones, and other devices can be a distraction, so our standing rule is that these items will be on silent, only taking high priority or emergency calls.

2. Establish a meeting leader.

Each meeting should have a leader to ensure the focus stays on the correct topic so the outcome can be achieved. When non-related points or newly discovered needs arise, the leader should have an established mechanism to respectfully create a list of the issues that are not "on the horizon" (see the next paragraph) for the meeting. Determine the best time and means to follow up on these items, so people do not feel ignored. List them out at the end of the meeting or put them in an established list, so they turn into the necessary actions.

3. Determine the horizon of focus.

This concept was first introduced by the author of *Predictable Success*, Les McKeown. His book is amazing for growing companies. I highly recommend it, as well as his online courses. The "horizon of focus" can be defined as the *purpose of the meeting*. A common problem in meetings is that one issue will lead to another in an endless rabbit trail that can keep the meeting from being productive. Often, the side issues do not need the entire group's attention and can be handled with a smaller group as a sideline. Sometimes an issue may need the attention of the full group but should still be tabled for a later time in order to focus on the original topic (unless, of course, the new item needs to be solved first in order to facilitate the original issue).

4. Establish a meeting agenda.

Each meeting should have not only a horizon of focus but also an agenda. Sticking closely to the agenda is essential to keeping meetings focused and efficient. If issues come up during early agenda items, they are added to the IDS section of the meeting. Different types of meetings have different agendas. One-on-one meetings, for example, are very specialized based on the roles and responsibilities of the two attendees, while team and leadership meetings may have similar agendas but differing scopes. JMARK executive team meetings generally follow EOS guidelines, which you can find here.

In general, a JMARK meeting looks like this:

- *Review the agenda* (Any deviations from the default agenda will be listed.) – Attendees should review this in advance
- *Segue* – Ten minutes or less
- *Scorecard* (KPI review) – Ten minutes or less
- *Rock review* ("Rocks" are our overarching company strategic priorities for a given period. Some organizations spend more time here, but we have a separate meeting focused on rocks.) – Five minutes or less
- *Client and/or employee headlines* (Need-to-know items, challenges, wins, turnover, etc.) – Ten minutes or less
- *Departmental summaries* – (Things going on within a team that need to be shared with the larger group.) – Ten minutes or less
- *To-do list review* – (Quick review of action items from prior meetings. The goal is to complete each action item prior to the subsequent meeting.) – Five minutes or less
- *IDS* – (Dealing with issues that need resolution.) – This is how we spend most of our meeting time
- *To-do's/next steps and cascading messages review* – Ten minutes or less
- *Meeting rating* (Each meeting should be rated on a scale of 1 – 10. Anything lower than an eight should include feedback on improvements for the next meeting. The goal is to achieve 10 out of 10.) – Five minutes or less

5. Start and end on time.

One of the biggest problems with meetings is when they do not start and end on time. At JMARK, we do our best to start on time, even if not everyone is present. We also end on time to ensure people can carry on with their schedule without the meeting causing a domino effect of schedule challenges throughout the rest of the day. Meetings that run late are a huge reason why people dread all meetings. If you know you will need extra time, get permission for it to run late, either at the beginning of the meeting or as soon as it becomes apparent that you will run long. Accept that this may not always be possible, depending on attendees' schedules. And, of course, doing this should be the exception. If you consistently run long, you need to recalibrate your meetings.

6. Use technology.

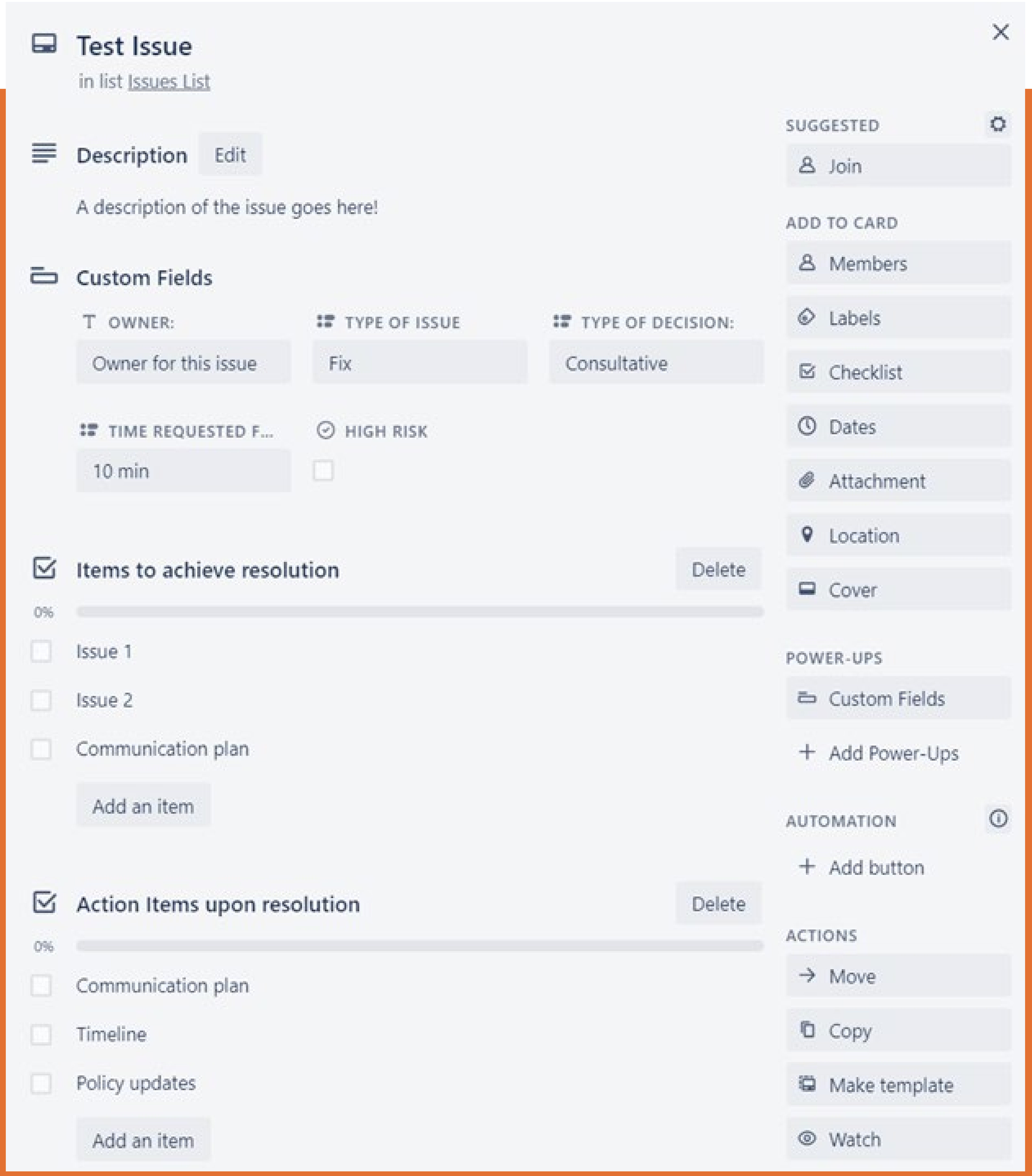
JMARK uses a few different tools to run successful meetings, including the following:

- *Microsoft Teams:* This is a great tool to lay out the agenda, where the meeting group is in a team, and each topic (or bullet) is a channel. You can see highlighted sections when an update is made to that section/channel. Make sure to provide the necessary security rights to each person in the team/meeting. It looks like this when set up properly:

Exec Team L10 Meeting

General
0 - Agenda (0)
1 - Segue (10)
2 - Scorecard (10)
3 - Period Rock Review (5)
4 - Client - Employee Headlines (10)
5 - Dept Summary - General Info (10)
6 - To Do List (5)
7 - IDS (60)
8 - Cascading Messages (3)
9 - Meeting Ratings (2)

- *Trello:* This is where we list issues that need discussion and resolution. We also have fields that define the type of decision, who owns the follow-through, and the anticipated time to resolve the issue. Notes for the issues are also captured here. Trello can be added as a tab in Microsoft Teams to make integration easy and seamless. Each card represents an issue that needs discussion and resolution. You can add necessary meeting members to the card and set notifications to get updates as the issue is taken to each succeeding level of resolution. It looks like this:



- *Room and individual video applications:* These include Zoom, Microsoft Teams, GoToMeeting, or any other system you prefer. If work is being done or shown in a different system, the meeting leader should share the screen to ensure everyone is focused on the right things. We recommend that everyone keep their video on at all times. This aids communication and increases feelings of team unity. Because hybrid meetings are a big part of today's culture, it is important that technology not be a distraction, so make the investment for quality meetings. For meeting room systems, we recommend the JMARK Engage system.

- *In addition to Teams and Trello, we also recommend MeetingZen.* This application works exceptionally well for one-on-one meetings because both parties can add their information in advance. This system is still in early release, but they are continually adding additional features. If you would like to know more, let us know, and we will connect you with the right resources.

Running productive meetings is anything but easy, but it is critical for the success of any growing organization. As you begin following the six steps above, you are sure to see results like greater engagement during meetings, a more cohesive vision throughout the company, and an increase in efficiency for the projects that follow.

If you want to learn how JMARK can help you leverage technology to set your employees up for successful meetings, both in the office and working from home, simply fill out this form or call 844-44-JMARK.