

Patterns for Leading Effective and Efficient Meetings

Part Two

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Are you lonely???
Don't like working on your own?
Hate making decisions?
Rather talk about it than do it?

Then why not

CALL A MEETING!!

You can
SEE people
DRAW flowcharts
SLEEP in peace
FEEL important
IMPRESS (or bore) your colleagues
LEARN to write volumes of meaningless notes
MAKE meaningless recommendations

ALL on COMPANY TIME !!!

**MEETINGS....
THE PRACTICAL ALTERNATIVE TO WORK**

1. Introduction

“Meetings are indispensable when you don’t want to do anything.” Galbraith

Meetings are part of every day life. They are necessary for planning, discussing and deciding issues in projects. But most of us have – at least at one point – sat in a meeting that could have been a lot more effective and wondered how much more time we will need to waste... Many of us have even spent seemingly endless hours in meetings that seem dull, ineffective or even counterproductive.

On the other hand, practically every one has a repertoire of “best practices” that would help make meetings effective – if used.

The purpose of this paper is to continue the work done in the focus group at EuroPLoP 2005 and in Marinas paper which was shepherded at EuroPLoP 2005 on patterns for leading effective meetings and hereby to produce a collection of good quality patterns for leading effective meetings. So here are a few more patterns for leading effective meetings – again without claiming that the collection is now complete ;-)

Focus for feedback

As always of course we are grateful about any feedback but because this paper is rather long, we have thought about aspects we would be especially interested to have feedback on:

- 1) Which patterns for leading good and effective meetings are still missing in this collection?
- 2) Are any patterns or pattern-parts so banal that they are not worth being written down?
- 3) We have introduced the concept of “umbrella patterns” in this paper – we state that “moderate this” and “plan well” are patterns that do have concrete solutions but are on a higher level than the other patterns. We would be interested in what you think about this concept (see page 8 “Relationship of the patterns”).
- 4) We think that one of the challenges in writing papers on soft skill themes is that while there is a lot of literature about techniques – there is not very much about the forces. Because of this we would be interested if you notice that forces or consequences are missing.
- 5) We find naming difficult – so if you happen to think of more intuitive names we would be grateful.

Summary of Patterns for Leading Effective and Efficient Meetings, Part One.

Part one describes five patterns, namely **Develop a Structured Agenda, Switch to the Meta-Level, Park Tangential Issues, Do Refreshments, Tabulate Your Minutes**. As it is always difficult to read a second part of a paper without having to read the first part, we have added thumbnails of the patterns in the first paper as an annex. And as we don't want to presume that everyone has read the first paper, the introduction will be a repetition of the first paper, setting the context for this collection of papers – so bear with us – and if you already know the introduction... just skip over it and go directly to the patterns.

2. Vision: Effective and Efficient Meetings

Before taking a look at the patterns, let's take a moment to take a closer look at the goal. What are efficient meetings? When does one call a meeting effective?

Meetings happen on at least two levels. The factual level – people meet to present information to others and review, evaluate, discuss, problem-solve, reach decisions together. But people also meet for social reasons. They have the underlying wish to achieve results and make an impact. They have a desire to communicate and to build and share a common reality. Therefore both aspects have to be included in organising an effective meeting. A meeting has to be made effective by addressing both levels.

Meetings are effective if they have an effect – if they produce the desired result i.e. a decision and/or an action plan in a reasonable amount of time.

An effective meeting is also one where the participants feel good about themselves and the group, willingly and openly share their ideas and concerns, work together constructively and positively and leave the meeting feeling fulfilled and glad to be part of the group. They also have the feeling their time was well spent.

Key points of an effective meeting are that

- Goals were reached in an acceptable time.
- It had a clear objective known to every participant.
- The discussion in the meeting was focussed and well informed.
- The communication was constructive most of the time and not first and foremost confrontative.

Introduction

- Hidden agendas were either explicitly stated in the meetings or did not hinder the process of reaching a workable decision.
- At the end of a meeting a decision (or several decisions) was (were) reached that was (were) accepted by most of the participant and that could actually be implemented. Precise action items were distributed and everyone knew what the next steps were that have to be taken and by whom.
- The time schedule was kept.

3. Scope

In this section of the introduction we would like to define the scope of the paper more precisely by stating the audience and the specific context. This will help set the stage for the following patterns by stating which context the patterns were written for. Stating this context upfront makes boring repetitions in the context section of each section obsolete. If necessary the context will be defined more clearly in the specific pattern. Otherwise the context section of each pattern will only state in which phase (meeting preparation, during the meeting, after the meeting) the pattern is to be applied. Of course it is possible that the patterns are applicable in other contexts as well. But defining a precise context helps to understand better what prerequisites have to be in place, so that the pattern works.

3.1 Audience

The patterns in this paper address the leader/organiser/moderator of a meeting. Obviously the leader and the moderator do not have to be the same person – but they often are.

3.2 Specific Context

A meeting can be defined as a formally arranged gathering or the social act of assembling for some common purpose.

The participants are all present in the same room

According to the definition above, telephone conferences and videoconferences are also meetings – as are online meetings – i.e. meetings in chat rooms etc. But as they take place with totally different prerequisites from those where the participants are actually present, we are excluding them from the context of this paper. The patterns in this paper are applicable to people gathering in one room for some common purpose.

Focus: Reaching decisions

This definition is still too general, however. There are different kinds of meetings. And effectivity can mean different things in different kinds of meetings¹.

- Some meetings have the sole purpose of exchanging information.
- Some meetings have the purpose of discussing problems, engaging in creative thinking and generating ideas. They do not necessarily need to have a decision at the end of the meeting.
- Some meetings have the purpose of reaching decisions on one or more points.
- Other meetings have the purpose of building relationships and commitment.
- Some meetings have the purpose of de-escalating conflicts.

Most meetings want to reach all of the above goals to some extent. But mostly there is an emphasis on one point. For example, a meeting might have the purpose of discussing problems, exchanging information and reaching decisions but discussing problems and exchanging information might just be tools for reaching decisions. Then the meeting would have an emphasis on the purpose of reaching decisions.

Another meeting might have the same three purposes (discussing problems, exchanging information and reaching decisions) but have the main emphasis on collecting creative ideas on solving a problem. It might be nice if decisions were reached – and exchanging information is often necessary for fruitful discussions but the main aim is to have a time of creative brainstorming.

The patterns in this paper are especially applicable to meetings that have an emphasis on reaching one or more decision(s) irrespective of the question whether the participants meet on a regular basis or not.

4. Structure of the patterns

Each pattern in this paper is structured as follows:

Context

The context section is comprised of the information in which phase of the meeting the pattern is relevant.

Problem

States the problem the solution solves.

¹ Lencioni p. 224

Introduction

Forces

States the pattern's forces – i.e. why the problem is the problem, what aspects influence the solution or the path to the solution.

Solution

States the solution.

Consequences

Everything we do has positive and negative effects and side effects. The consequences section shows to what extent the forces are balanced by using the solution. It collects the benefits and the liabilities of using the solution.

Implementation

The implementation section gives concrete tips on how to implement the pattern in actual meetings. These sections are sometimes long – and may even include other patterns that might be extracted in future papers

5. Overview of the Patterns

Before starting out with the concrete patterns we would like to give an overview of the patterns. As stated above there are thumbnails of the patterns introduced in the first paper in the annex. To get a quick impression of the intent of the patterns, we've added a table that states the intent of each paper. The bold patterns are those described in this paper, whereas those with a grey background are the ones described in part one.

Intent Table

Pattern	Intent
Brainstorm	Find solutions to the problem underlying the meeting by drawing on the ideas and experiences of the participants.
Do Creativity Techniques	Help participants to think outside of the box when problem solving.
Go the Whole Way	Use a process to solve a problem using brainstorming – so brainstorming actually is effective.

Introduction

Water Clock	Keeping to the time schedule without becoming stressed.
Don't Meet	Meet only when you know the purpose of the meeting.
Moderate This!	Leading a structured meeting.
Plan Well	Preparing the meeting beforehand.
Paraphrase	Improve communication by helping people understand each other.
Develop a Structured Agenda	Key ingredient to a structured meeting.
Do Refreshments	Create a motivating atmosphere.
Tabulate your Minutes.	A structured, time efficient way of recording the contents of the meeting.
Park tangential issues.	Deal with issues that arise that are important on principle but not part of the agenda and not prerequisite to reaching the meeting's goals.
Switch to the Meta-Level.	How to get a meeting back on track.

Another possibility of structuring the patterns is according to the question whether they are organisational or interpersonal:

Organisational	Interpersonal
Don't Meet	Park Tangential Issues
Plan Well	Paraphrase
Develop Structured Agenda	Brainstorm
Do Refreshments	Switch to the Meta-Level
Water Clock	Do Creativity Techniques
Tabulate your Minutes	
Moderate This!	
Go the Whole Way	

6. Relationship of the patterns

When defining the relationships between the patterns we discovered that in our opinion the patterns are partly on different levels. On a higher level the patterns **Plan Well** (before the meeting) and **Moderate This!** (during the meeting) stand out. These are not just abstract concepts – using these patterns actually do solve problems, they actually do have concrete solutions. But part of the solution is to use other patterns. These other patterns used in the solution are on a different smaller, conciser level.

The diagrams 2 and 3 show that the patterns **Plan Well** and **Moderate This!** are sort of “Umbrella Patterns” or – for want of a better word “Super-Patterns”. They do have concrete solutions and implementations. But part of their solutions are using other concrete patterns – for want of a better word “Sub-Patterns”.

To illustrate this the diagrams 1 and 2 are structured similar to mind maps. They only want to state something about the thematic relationship – not anything about an order of using the patterns. The patterns described in this paper are bold.

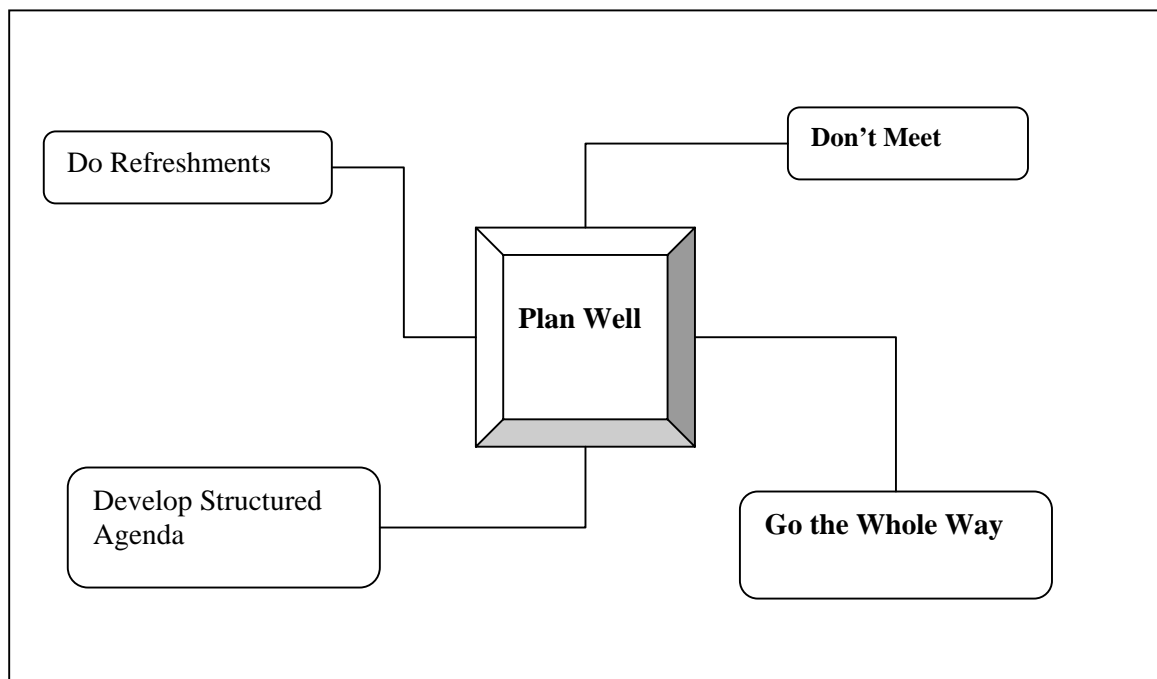


Diagram 1

Introduction

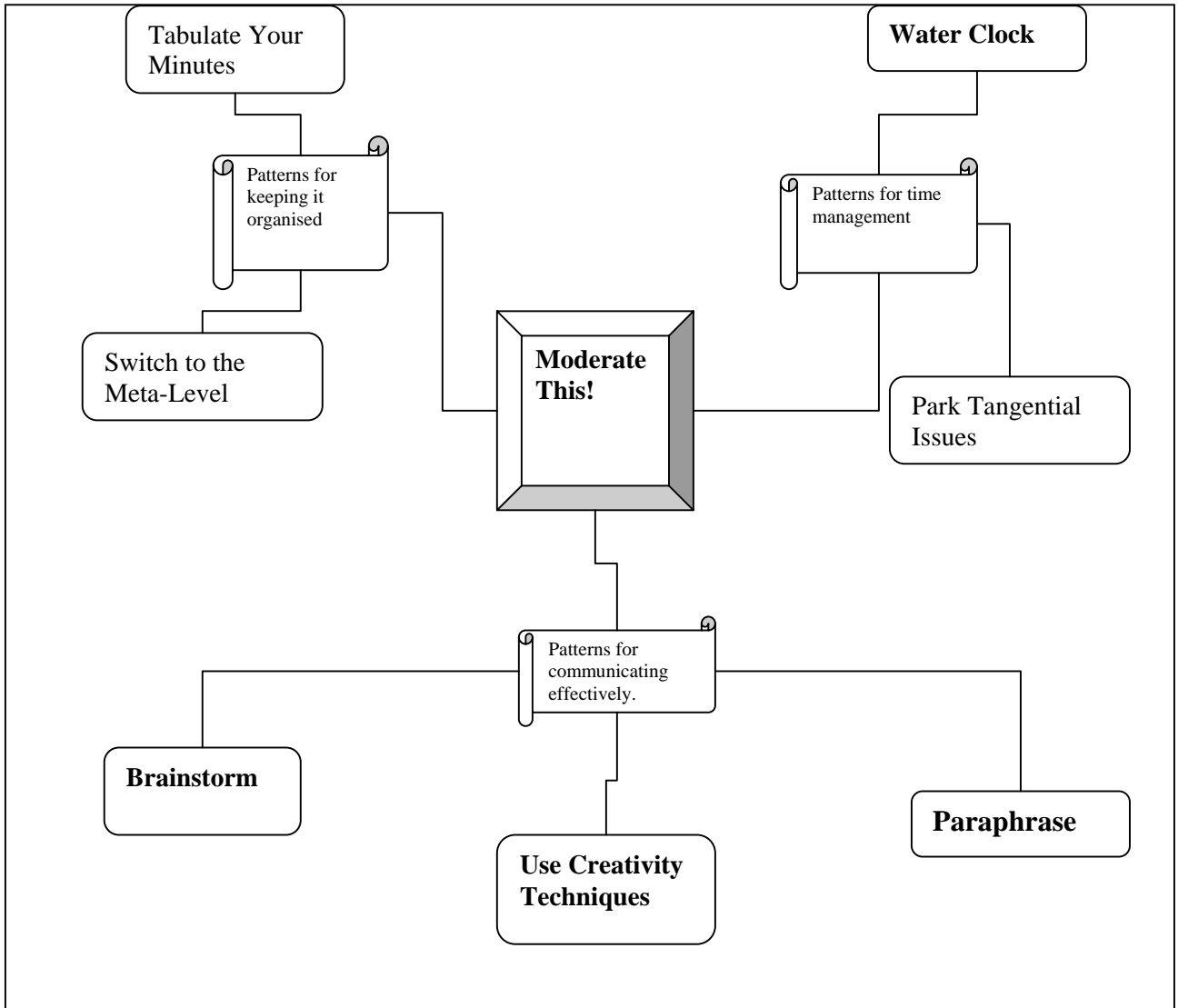


Diagram 2

Introduction

As far as sequences are concerned. We have added a sequence diagram. We are not sure how helpful this is because one can use the patterns in different contexts. because one can use all of the patterns in one time context (before the meeting or during the meeting) but one doesn't have to. It depends if the problem arises or not. But we've added a sequence diagram for what it's worth.

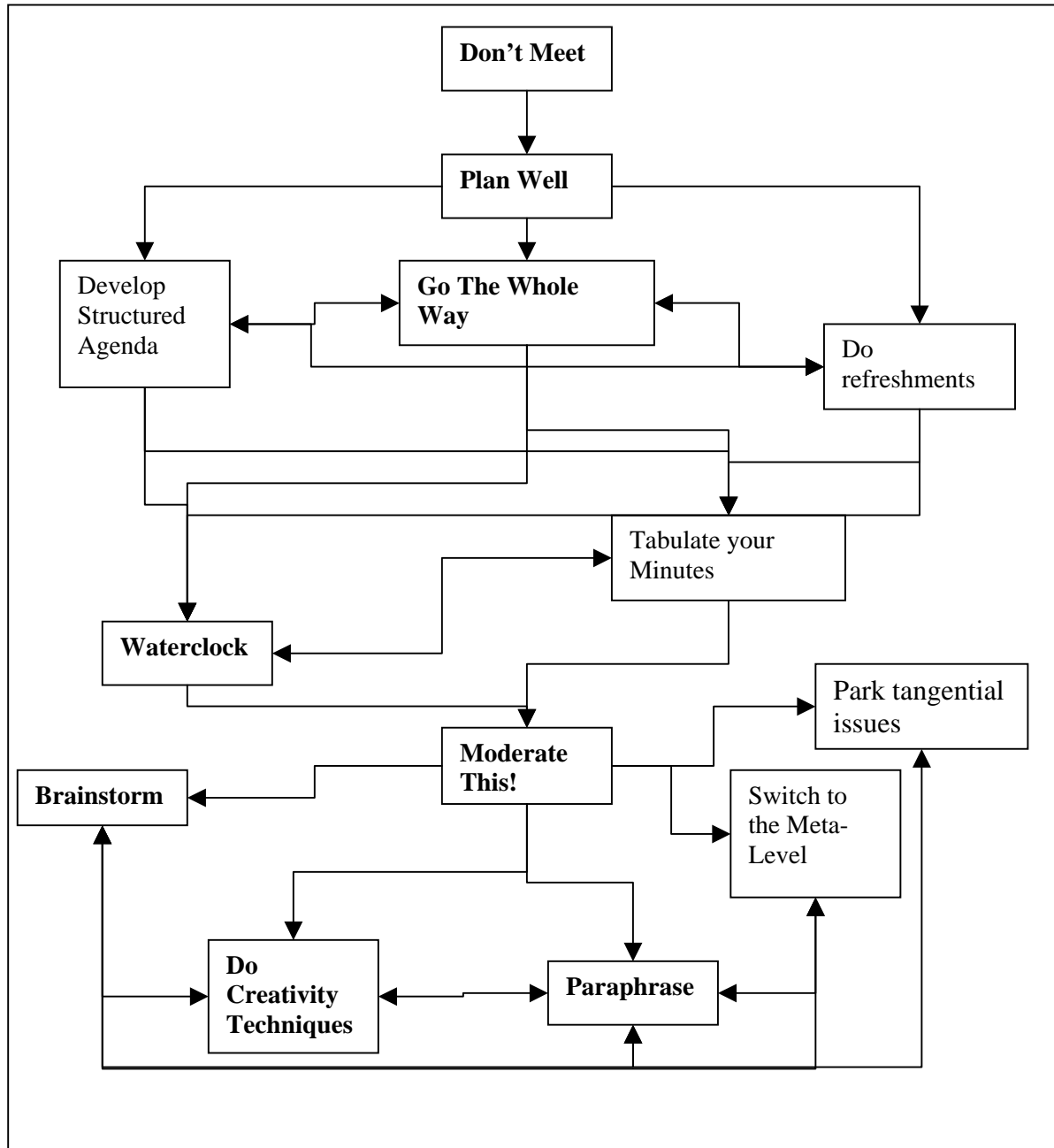


Diagram 3

Brainstorm

"There is a time and a place for everything" Ecclesiasties

Context

During the meeting. Atmosphere of trust in the team. People should have some knowledge of the domain the problem they want to solve is part of. The problem should have been defined precisely beforehand. Ideally the participants have a bit of experience in creative thinking and have are motivated to solve the problem. Alternatively a leader wants to collect ideas from the participants without actually having the goal of solving a problem in the meeting.

Problem

You have a problem you have to solve and you think that the solution is best found through the synergy of the participants in the meeting. You also may want the solution to arise out of a group effort of all of the participants.

How can one create an atmosphere where the participants feel free and motivated to state their ideas?

Forces

- ◆ Having many ideas is a good thing because one then has many ideas to choose from and hereby heightens the chance of finding a better solution. But the more ideas you have, the more time you have to invest to filter the ideas.
- ◆ While having an open, fun atmosphere heightens creativity, it also creates an atmosphere that can make it difficult to focus and control the direction and the outcome.
- ◆ While it is always a good idea to have all the relevant people participate as everyone sees things from a different perspective, they may not always be open to participating as they may fear having their ideas criticised or ridiculed.
- ◆ When one concentrates on evaluating a possible solution one usually focuses and so does not see so many other solutions. One tends to try to do things as they have always been done and one tends to see the world as one has always seen it.

Brainstorm

- ♦ While it is a good idea to encourage everyone present to participate with the same amount of time, this is difficult to realise because some people are introvert while others are extrovert.
- ♦ Time is money. People often don't get round to doing delegated work by a time deadline.

Solution:

Collect ideas in writing as they come in without judging or categorising them at first.

One basic idea behind brainstorming is to make a distinction between the phase where ideas are collected (the "brainstorming phase") and the phase where ideas are evaluated. The phases are meant to take place one after the other.

During the brainstorming time every idea is added without judging it. Judging or evaluating ideas reduces the effectiveness of brainstorming as it firstly causes everyone to be more careful of what they say, and when everyone is trying to evaluate ideas they are not spending the time collecting new ideas. And secondly it reduces the amount of ideas because one starts working on the "next best idea."

Consequences

1. Benefits

- ☺ One collects many ideas on how to solve a problem. As: "The best way to have a good idea is to have many ideas." (Linus Pauling).
- ☺ Brainstorming helps use synergies as everybody sees things from a different perspective and looks at the problem and it's solution from his/her own perspective.
- ☺ The solution is more of a group thing as it was developed by the whole group. It can be very motivating for the team because everyone has the feeling he/she has participated in developing the solution.
- ☺ Sometimes one solves other problems as a side effect.
- ☺ People would often not sit down and work on the problem alone. In the meeting they are already there and then can be better motivated to actually work on the problem.
- ☺ Brainstorming helps a group to develop ownership of the solution to the problem.

Brainstorm

- ☺ Brainstorming helps teams grow together and creates more of a team awareness. It can be a bonding experience.
- ☺ Brainstorming is fun – and hereby helps motivate people to work and to carry on with the solution.
- ☺ Brainstorming gets people involved – helps them feel that they can change and influence something. (If the outcome is put into practice)
- ☺ Brainstorming brings people together into the creative process and increases the social nature of the project.
- ☺ Brainstorming also often gets people thinking and communicating with each other about topics relevant to the next few weeks or months of work. This can be more valuable than the actual ideas.
- ☺ Brainstorming can increase the personal creativity of the participants and build self confidence.

2. Liabilities and Limitations

- ☹ Brainstorming is not easy – although every one thinks he/she knows how it should be done. People often overestimate what brainstorming can do. It is a communications tool – and obviously cannot guarantee a good solution. But several steps can be taken to make it as effective as possible. You may have collected a lot of ideas but you need the next phase: the evaluation phase and then most importantly the phase where you decide who is going to do what.
- ☹ Production Blocking. You don't need a group to come up with ideas. You never heard of Beethoven or Mozart doing a brainstorming session to come up with ideas for their new pieces. And some people have better ideas when brooding over things alone. The outcome on some research has been that brainstorming in groups produces less ideas than brainstorming of the same amount of people alone². In face-to-face brainstorming only one person can speak at a time. While listening an individual can forget his/her ideas, the ideas can appear irrelevant or the individual can become distracted.
- ☹ Evaluation Apprehension. Unspoken criticism cannot be hindered totally. And the less trust in the group, the more hierarchies present, the more this becomes a problem and cause demotivation. You need an authentic moderator and a group where trust is involved – and so this is part of the necessary

² Strobe/Nijstad <http://de.wikipedia.org/wiki/Brainstorming>

Brainstorm

context. **Solution:** If the group isn't comfortable - start out with pair brainstorming or use anonymous brainstorming methods.

- ⊖ The effectiveness of brainstorming rises with the amount the experience the participants in the group have with brainstorming and creative thinking methods and how open they are to new ideas.
- ⊖ Social Loafing or Free riding : People often feel unmotivated when working in a group because they assume their contributions will not be valued. People are lazy and have a tendency to put less effort into group projects than ones when working alone.

Implementation:

The basic idea behind brainstorming is to collect ideas in writing as they come and sort or evaluate them later. After collecting ideas one obviously needs to structure them and evaluate them. It is very important that the moderator keeps these phases apart.

There are a few rules should be agreed on so that brainstorming will work. They are stated in the following:

- 1) No open or implicit Criticism of Ideas
- 2) Quantity before Quality
- 3) Build on each other's ideas. No idea ownership
- 4) Encourage wild and exaggerated ideas.
- 5) Short Speaking time
- 6) Hierarchies play no role.

A note on rule 1: To implement rule 1 it may be very helpful to explain what killer phrases are: namely phrases that block the creative thought process:

Brainstorm

Killer Phrases

Yes, but...

That won't work.

That's totally unrealistic.

That is impossible.

That is too expensive.

That's too risky.

Why should we change that?

It is too complicated.

It has been proven that...

But in practice it is different...

You are overlooking the following...

We've already tried that...

One can either do brainstorming in a group where every participant shouts out his/her ideas and the moderator collects these. Alternatively there are several different kinds of ways of doing written brainstorming where the participants write down their ideas. It is often helpful to give each person 5 minutes at the beginning to write down the ideas he or she has – so that no idea is lost in the interaction between the participants.

Do Creativity Techniques

"Creativity requires the courage to let go of certainties." Erich Fromm

Context

In a meeting, in a team without active distrust.

Problem

Often meetings have the goal of solving a problem. Sometimes the solution to the problem seems obvious. But you have the feeling there might be other alternatives. You have a problem you want to solve but have the fear that everyone will carry on in the same thinking patterns as all along.

How can one help initiate people to start thinking outside of typical thought paths?

Forces

- ◆ While using creativity techniques helps people to see things from a different perspective, it may be difficult to get people to participate because people are prejudiced against creativity techniques.
- ◆ People tend to be afraid of doing things that do not directly seem to be a logical way of getting nearer to a solution.
- ◆ Often one does not notice that one keeps thinking along the same thought paths. Or one doesn't see the necessity. It works the way we've always done it.
- ◆ People may not feel comfortable doing things that they are not used to doing. And using creativity techniques is not something that people are used to doing.
- ◆ Often people tend to look for the one right answer to a problem and not realize that life is ambiguous and cannot be controlled.
- ◆ People don't want to make mistakes and do things the wrong way.

Solution:

Apply creative techniques to help get a totally new look on a specific problem and generate more ideas..

As far as the theory goes brainstorming should be used together with a creativity technique. This is a technique that is used to gather ideas and broaden the horizon or the solution ground before narrowing down to the problem.

Consequences

1. Benefits

- ☺ Using creativity techniques helps to shift the perspective one looks at things from a different perspective.
- ☺ Using creativity techniques help people break out of their thinking patterns. It helps people to break out of typical thinking patterns that say: "There is only one right answer". It helps people question assumptions.
- ☺ Creativity techniques help find new solutions when one is at a dead end when thinking.
- ☺ Creativity techniques help use group synergies because using the techniques helps involve all people in the process - and as it is sort of a game and not "totally serious" problem solving it helps people afraid of making mistakes to say something - because it is totally clear that there is no right or wrong.
- ☺ If the problem happens to be emotionally charged using creativity techniques can help people forget the emotionally charged atmosphere.
- ☺ Using creativity techniques in a group helps bond the group together. Often people use games to bond a team together. Creativity techniques can take over this function - because they are often like games - and also generate helpful ideas as an outcome. This helps participants take part - as a lot of people do not like to take part in the games as they seem pointless.

2. Liabilities and Limitations

- ⊗ A lot of people have mind sets that block creativity. They think along the same paths and seem to think that one can control things, that there is only one right answer. And people have to break out of this mind set themselves. One can't force them to.
- ⊗ Creativity techniques work best in groups of people who are experienced with creative thinking. The problem with inexperienced participants is the time factor. People are used to thinking things through analytically. But with most creativity techniques one has to start to think associatively. It can take time for people unused to these methods to get into them. "Beginner groups" tend to have a smaller outcome on ideas than experienced ones.
- ⊗ Using creativity techniques takes longer.
- ⊗ The quality of the session is dependant on the quality of moderation. The moderator first of all has to decide on a creativity technique that fits the group and the problem. Then the moderator needs to be able to motivate the group and to moderate. He/she then has to be able to organise the outcome and focus back on the problem.

Implementation:

Here are three creativity techniques that can be used together with brainstorming.

Reverse Brainstorming³

Reverse brainstorming uses the fact that people always find it easier to be negative than to be positive. Thus we change the problem round. "What can we do to make the problem worse?" E.g. if the problem is: "How to improve communication in our company?", use the problem statement: "Think of how to make communications fail within our company." Spend time thinking what would have to be done so that the problem would definitely not be solved. In a second step turn around the ideas you have collected ideas - turn them into the opposite.

Associative Brainstorming⁴

Take a random word or picture and form free associations from the word or picture. In a second step take the list of words/phrases you have come up with and use them as ideas in a brainstorming session about ideas for solving the problem. "How could

³ Klein, p. 134; Roger von Oech p 131; Michael Michalko Cracking Creativity p. 180.

⁴ Klein p. 278, Brian Clegg Instant Creativity p 72, 74; Michael Michalko Cracking Creativity p. 144; Sellnow Die mit den Problemen spielen p. 59; Noack p. 82.

Do Creativity Techniques

the associations help with the problem? What solutions do they make you think of? How could you change things to be done like that?"⁵

Rolestorming⁶

Get the participants to take over another role. Let them spend a few minutes identifying with their role (maybe even have them talk about what it is like to be their character) Then have the participants brainstorm in this role. (What would the person whose role they are taking say about the problem? How would they solve the problem?).

As possible roles:

- roles of people actually involved (team leader, old member of the team, new member of the team)
- another variation of this is to have people slip into roles that are totally different from the ones in the real-life situation (e.g. Sherlock Holmes)... for a list cf. attachment D. or for a simulation with different people visit: <http://gocreate.com/tools/index.htm> .
- or let people take over the role of a superhero. Prepare general information about the superhero beforehand (e.g. name, special powers, weaknesses, background, picture) Get them to think a little about that superhero and talk to them about what life is like as a superhero in order to help them slip into the role.
- or let the participants think what people with different jobs would say to the question – for a simulation with random jobs see: <http://gocreate.com/tools/jobs.htm>

More creativity techniques are listed on the website www.mycoted.com and also gathered together in Marina's script for the session creativity in practice at the Spa Conference 2007. If you would like a copy just mail Marina and she'll send you a copy (664KB).

⁵ For random words and pictures you can visit:

<http://www.brainstorming.co.uk/onlinetools/websoftware.html>

For random pictures <http://www.brainstorming.co.uk/onlinetools/websoftware.html>

⁶ Brian Clegg Instant Creativity p 68; Roger von Oech p 77; www.brainstorming.co.uk; Sellnow Die mit den Problemen spielen p. 59.

Go The Whole Way

"A fool with a tool is still a fool."

"Things not worth doing well, may not be worth doing at all."

Context

A meeting where brainstorming is to be used to help the participants solve a problem.

Problem

Often brainstorming is used in meetings to help find solutions to problems. And more often than not the brainstorming session is either too vague to find solutions to the problems or the numerous ideas are not put into practice (or both). Hence the brainstorming was just a waste of time.

How can one implement an effective brainstorming session?

Forces

- ◆ Everyone knows and has experience with brainstorming. No one really thinks about the method and just does "brainstorming" as he/she deems right. Because of this people don't see the necessity of questioning the way they've done brainstorming up until now - and this makes it difficult to improve the process.
- ◆ Time is a scarce commodity. People often don't have the time to look at the things they do from a Meta-Level and ask themselves the question: "Why?". Also often people do not have the time to define a precise problem.
- ◆ While brainstorming is a popular tool in meetings and is often thought of as the thing to do, a lot of people don't want to spend too much time on brainstorming as they don't really believe that brainstorming is an effective problem-solving process.
- ◆ The outcome of using brainstorming is often rather chaotic and more often then not, not put into practice.
- ◆ Things don't happen on their own. Having good ideas is not enough. They have to be implemented.

- ◆ People often have big expectations of what brainstorming can do – or no expectations.

Solution

Implement a process for brainstorming.

First of all: decide why you want to brainstorm.

There are different contexts where brainstorming is used. Sometimes it is just about gathering ideas from a group so that you as group leader can carry on working on them. Maybe sometimes brainstorming is used as an icebreaker to create a group awareness or to collect impressions of the participants. Some times brainstorming may also be a forum where people submit their ideas to a specific topic – and the main goal is to create a platform where each participant can be personally inspired by what the other participants say – without there being an overall goal for everyone. If this is the case then just using the pattern “brainstorming” without any other process can be very effective.

Then decide on a brainstorming process and implement it.

But if the goal of brainstorming is to solve a problem in the group then 10 minutes of vague brainstorming is not very effective. For an effective brainstorming – problem-solving session it is not only important that the brainstorming phase is done correctly and the brainstorming phase is distinct from the evaluation phase. It is vital that there is a good, precise problem statement. It is just as vital that after the evaluation phase there is a short phase in which the next steps and those responsible are stated. It is often very helpful to use the pattern “do creativity techniques”.

Consequences

1. Benefits

- ☺ One does not raise the wrong expectations: the participants know what effect their input will have.
- ☺ You have room for creative problem solving process and at the same time have a structured way of solving a problem. So, one doesn't only have a good feeling one actually does get things done.
- ☺ The participants are more motivated because the preparation shows them that their times is valued and not treated as an endless, cheap resource.

Go the Whole Way

It is easier for the participants to take part in the creative process as there is a structure. With no structure a lot of people feel rather helpless and aren't able to enter into creative, maybe at times chaotic problem solving times.

- ☺ Structuring the session beforehand helps actually solve a problem. The problem is defined beforehand and it is part of the process to delegate to do later.
- ☺ Having the process helps to moderate because the moderator has a meta level he/she can refer to in order to bring things into focus again.

2. Liabilities and Limitations

- ☹ The quality of the brainstorming session stands and falls with the quality of the moderation. The moderator should at least have a good feeling for moderation: good listening skills, sharp group awareness and the ability to help people express their ideas is important. He/she should be able to deal with monologues from one participant and learn to write down the ideas well.
- ☹ Time is a scarce commodity.
 - It takes more time beforehand to define the problem statement properly. Solution: Define the problem in the group.
 - It also takes more time to implement the whole process instead of just the brainstorming phase. possible Solution: Think about the goals of the meeting. Sometimes you may just want the people to do brainstorming as input for you to carry on with the problem solving. Then it is a waste of time to try and implement everything - and frustrating for the people to see that you decide in the end.

Implementation

One possible process to follow - without wanting to say that this is the only possible process - is "do-it"

DO IT is an acronym that stands for:

D - Define problem

O - Open mind and apply creative techniques, structure the ideas

I - Identify best solution (evaluate, maybe refine)

T - Transform (Take action!)

But the main thing is that a process is actually followed.

Water Clock

"How can one contrive not to waste one's time? By being fully aware of it all the time. Albert Camus"

"The secret of my success is that at an early age I discovered I was not God." Oliver Wendell Holmes.

Context

You have a goal and an agenda for the meeting and want the meeting to be productive. The meeting culture is not a strictly hierarchical context – i.e. you as a leader will not just have authority by being there and will not be deciding.

Problem

Meetings and agenda points tend to take longer than planned. One starts discussions, is not totally focussed and because of this the time plan cannot be kept. Sometimes the agenda points tend to drag, or one spends the time ineffectively. In some meetings people are present who talk for a long period of time without letting others get to word. This is a problem as often people don't listen all of the time – minds start wandering, the meeting becomes less focussed. The meeting and the agenda points tend to take longer. More quiet people have less of a chance of stating their ideas.

How can one keep the meeting on track while staying involved in the meeting?

Forces

- ◆ It is difficult to concentrate on different things at the same time. No one can do everything at once. It is especially difficult to moderate a meeting and watch the time at the same time.
- ◆ No one wants the meeting to take longer than planned.
- ◆ In interesting discussions people tend to forget time.
- ◆ If people don't feel involved or motivated or in other words they don't have ownership for the meeting, then they tend not to be so focussed.

Water Clock

- ◆ No matter how much or how little time you have, one tends to use all of it.
- ◆ If there is no felt time limit, people tend not to be focussed.
- ◆ Topics need a few minutes in which to wind things up.
- ◆ Some people like to hear themselves talk.
- ◆ Some people tend to present all their arguments at once and hold a speech.
- ◆ Experts tend to explain topics from their domain verbosely.
- ◆ Interrupting people is bad style and creates a bad atmosphere. People are hurt/annoyed when interrupted.
- ◆ People are annoyed when participants keep talking for ages and they stop listening and become demotivated.
- ◆ If one person speaks for a long period of time, people tend not to listen carefully.
- ◆ If people are not paying too careful attention the meeting becomes less focussed.

Solution

Limit the allocated time beforehand and have a time keeper signal when the time is up.

Decide that agenda points should be limited time wise. Appoint a timekeeper who gives a signal a few minutes before the time allocated for one agenda point or is up.

If necessary decide on how long people are allowed to speak for at a time (say one minute)⁷ and have the timekeeper give a signal when the time is up.

Try to introduce this in a humorous way.

Consequences

1. Benefits

- ☺ The moderator can concentrate on moderating the content.
- ☺ The moderator and the participants feel pressure to be concise.

⁷ Bischof/Bischof p. 16

Water Clock

- ☺ Involving people (i.e. here the timekeeper) helps to motivate them and helps them to feel ownership of the meeting.
- ☺ Everyone can relax a little more – because they know some one is watching the time and the meeting will not go on to infinitum.
- ☺ Often one has the assumption that decisions have to be met in consensus. Through limiting the time you also help people break out of this way of thinking.
- ☺ During time a moderator learns how much time should be planned in for agenda points.
- ☺ Time is divided more fairly between the participants.
- ☺ If people know beforehand that they will be interrupted in one minute they tend not to take it personally if it happens.
- ☺ If speaking time is limited, people will stick to the main issues
- ☺ The discussion is more focussed.

2. Liabilities and Limitations

- ☹ The allocated time might not be enough. You might not be able to reach a consensus in the given time. **Solution: Switch to the Meta-Level** and ask the question where the group wants to go from here.
- ☹ You need to find and appoint a timekeeper in advance.
- ☹ The timekeeper may not be able to concentrate on the meeting as well. **Solution:** Circulate the participant who is timekeeper in each meeting.
- ☹ People may not be as creative if the time slot is too short and they feel too much pressure.
- ☹ People may not be able to formulate well when under pressure.
- ☹ If you aren't strict with everyone people will feel unfairly treated.
- ☹ If you are strict people may still feel hurt.
- ☹ If overused it can stop Meetings being effective because everyone is so focussed on time issues they don't have the capacity to be focussed on the content.

Water Clock

- ⊖ One should probably only limit the time for each person's statements if one thinks it is necessary (because there are people who tend to go on and on forever). Because this does cause stress.

Implementation

One possible implementation is as follows: the timekeeper has three different coloured cards that he holds up, e.g. green = 5 minutes to go, yellow 2 minutes to go, red timeout.

You should explicitly introduce the timekeeper in the beginning so that all participants know his/her responsibility. If this pattern is used in a context of a team that meets on a regular basis, or whenever a decision has to be met, one should consider letting a different participant be timekeeper each time. If one person is always the timekeeper it can be annoying for him, and if this position circulates this helps all the participants be motivated to use the pattern and keep a watch on the time.

Another possible implementation would be to set a kitchen timer on the time "5 minutes to go." Then one might not need to introduce a person as timekeeper. One should still introduce the concept, though.

Related Concepts:

In ancient Greece water clocks were used as a way to measure speech-time of lawyer at a court house in order to have a fair dealing. ⁸

An example of such a water clock was a bowl filled with water. A smaller bowl with a hole in the bottom was put in the bigger bowl. As soon as the smaller bowl sunk, speaking time was up.

⁸ <http://library.thinkquest.org/20499/history.htm>

Moderate this!

"One must steer not talk. Seneca"

"Intuitive Leadership by the leader is essential, but it is effective only if it has been preceded by thorough analysis. Warren Bennis."

Context

Meeting preparation, during the meeting.

Problem

A lot of meetings drag on and peter out. The output is not great and everything seems to be a waste of time. Sometimes there doesn't seem to be a moderator or there are several people who feel called to be moderators. Often meetings then don't get to the point and end up being a vague discussion of the area.

How can one drastically improve the chances of the meeting being focussed and going in one direction?

Forces

- ◆ Some people like to talk a lot and like to lead the way.
- ◆ Some people are shy.
- ◆ Conflicts can arise when different people want to lead in different directions.
- ◆ If no one leads then everyone digresses.
- ◆ There are often different hierarchy levels present in meetings. And the person moderating the meeting might not be the person highest on the hierarchal level.
- ◆ Despite different hierarchies people do tend to appreciate freedom. If the meeting is too controlled it may hinder people from participating actively. Especially in agile communities where there are often very few hierarchal levels.
- ◆ People have emotions. And when people discuss problems they can become emotional.

Moderate This

- ◆ People don't always want to work. May see meetings as a welcome break in their workday.
- ◆ Everyone has a different motivation in the meeting. Also a lot of people will probably be thinking about different things during the meeting.
- ◆ Everyone thinks differently.
- ◆ Some people are dominant and like to hear themselves speak.
- ◆ Some moderators are afraid to be thought of as dominant in the negative sense of the word.

Solution

Dare to moderate the meeting actively.

Be a moderator with authority. Make your role and your expectations clear at the beginning of the meeting. This does not necessarily mean that you have an authoritarian leadership style. It is often enough to have authority concerning issues on the process level. During the meeting keep observing the meeting, trying to see if the meeting is staying on focus. As a moderator you should be experiencing the meeting on two levels. Obviously the level of the problems to be solved, of the agenda, but then on the process level, the abstract level. As a moderator it is your responsibility to have an eye on both levels and to lead the meeting.

Consequences

1. Benefits

- ☺ There is a better chance of reaching your goals.
- ☺ The moderator leads the people in a good direction.
- ☺ Having a focussed meeting motivates people.
- ☺ Moderating helps to structure the meeting and this helps reach a solution for the problems.
- ☺ People can relax if they know some one is in charge. They can then focus on the problem better without worrying too much if this meeting is going anywhere.

2. Liabilities and Limitations

Moderate This

- ⊖ If some one is very extrovert, is competent and has a lot of good ideas – he/she can become unmotivated if the moderator takes the lead and doesn't do things her/his way. Some people might get annoyed that the moderator takes authority.
- ⊖ There is a danger that the moderator uses the job as a moderator to have a forum of showing off and demonstrating power.
- ⊖ There is the danger that the moderator leads the meetings so formally that there is no room for creative problem solving and no one dares to say anything for fear of bringing the meeting off focus. In other words: One can overdo this pattern.

Implementation

Tip: Start each meeting and each agenda point by stating the goal. This makes a good start and helps people to focus.

Tip: State the process according to which you will be leading the meeting. Then everyone knows what is going to happen and this helps a process to be kept.

Tip: Be courageous. Stick to the agenda... Don't let yourself be brought off course too quickly.

Tip: Try to find out what level of information the people are at. They should mostly be more or less at the same level of information.

Tip: Use moderating tools (e.g. paraphrasing, questions) to moderate effectively.

Tip: Sometimes it is a good idea to let people peter out for a few moments to reduce stress levels. But it is also important to get back to focus before the meeting goes off focus.

Use your personality. Don't try and change your personality to be the moderator. Obviously it is good to learn tools and tricks on how to moderate best. But one always moderates best when one is authentic.

Plan Well

“To be prepared is half the victory.”

“Organising is what you do before you do something, so that when you do it, it is not all mixed up. Milne”

“He who fails to plan, plans to fail.”

Context

Meeting Preparation

Problem

A lot of meetings are ineffective and no one seems to have a plan on where the meeting is going. The moderator seems disorientated and the meeting goes in a direction that wasn't wanted, there is too little information present. Sometimes the meeting drifts off in a totally different direction and no one notices it.

How does one implement a meeting where surprises are less likely and everything is organised?

Forces

- ◆ Having a clear sense of goal orientation takes time.
- ◆ Planning is a job that is cannot be seen and measured directly so that it often is not appreciated.
- ◆ Some meetings happen spontaneously – there is no time for exact planning.
- ◆ Time is money. Especially in every day work life. A meeting costs the amount of hourly rates for each participant.
- ◆ People tend to underestimate the necessity to plan. Especially if they are used to leading meetings.

Solution

Take the necessary time to prepare the meeting.

Prepare the meeting! Take the time!

Consequences

1. Benefits

- ☺ A well planned meeting is a lot more effective.
- ☺ You show the participants that you value their time. This shows that you value them and this, again, motivates them.
- ☺ By thinking and planning you are better prepared, the meeting is more focussed and chances are the solutions will be better.
- ☺ You may even decide you don't need to meet.
- ☺ You break out of the pattern: "We meet because we always meet."
- ☺ The moderator is better able to lead the meeting in the direction he wants. He can be better prepared for possible conflicts. The moderator is not so easily taken by surprise.
- ☺ A well planned meeting takes less time.

2. Liabilities and Limitations

- ☹ You have spent more time preparing the meeting. Sometimes it is a trade off is necessary between how important it is to plan the meeting and other important things you have to do.
- ☹ A good plan today is better than a perfect plan tomorrow. This pattern can be overdone.
- ☹ On the face of it the solution is rather banal - every one knows it... and so one often does not think about it.
- ☹ This planning may cause you to worry more than beforehand.
- ☹ Sometimes you don't have the time to spend time planning because the meeting happens spontaneously. (Solution: cf. Abstract planning in implementation section)

Implementation

In the first step start off and define the goal of the meeting. While doing this it is a very good idea to use the pattern "Don't meet" to decide whether one should meet or not.

Plan Well

As a next step develop an agenda. In this context it may be helpful to also use the pattern “Develop a structured Agenda”. Then, plan which people should participate in the meeting.

Decide how important each person is for the actual meeting and if there are some people who are absolutely essential for the meeting to work out well, contact those people first in order to find out when they will have time⁹. One way of doing this in an uncomplicated way is to send round an Excel-sheet with the possible dates and ask each participant to enter when he/she is available.

For example:

Please indicate on which dates you would be free for the meeting with the goal X. Do this by colouring the according field red if you definitely cannot participate in these dates and yellow if you might be able to make it, but it is difficult.

	5.6. in the morning	5.6. in the afternoon	6.6. in the morning	7.6. in the morning	7.6. in the afternoon	8.6. in the afternoon
Max Mustermann	Yellow	Yellow	White	Red	Red	White
Carl Cautious	Red	Red	White	Red	Red	White
Manfred Manager	Red	Red	White	White	White	Red

After fixing the date in this way – and asking the participants to say if they are coming or not, it is a good idea to send the agenda round asking for comments and additions. Another consideration is the time you want to have the meeting. After lunch is usually the most unproductive time as everyone is rather sleepy. You should also think about how long the meeting should last. Usually a meeting shouldn't be scheduled to take longer than 90 minutes¹⁰. After that the concentration level goes down considerably. Even with a 90 minute meeting you should plan a break. So if you can see that the meeting will take longer than 90 minutes it may be a good idea to schedule several shorter meetings than one Mega-Meeting. Sometimes – if people are travelling far to attend the meeting and the theme will take longer – then scheduling several meetings is not an option. But then take special care to plan in enough breaks. It is also a good idea to plan when the meeting should take place.

⁹ Parker/Hoffmann p. 51

¹⁰ Parker/Hoffmann p. 53

Plan Well

At some point the moderator should take the time to consider which information the people should have in the meeting and sending round materials asking the participants to read them beforehand. Try to keep these materials as short as possible as this does increase the chance the people will have read the material by the meeting.

Then plan the environment. Decide on the room. Try to book a room that is large enough, has a friendly atmosphere and windows with fresh air. Plan whether and if so what kind of refreshments you will be having (“Do Refreshments”) and when – in a break or during the meeting. Plan whether you want to provide everyone with paper and pens and whether you want to give every participant a welcoming gift, i.e. a small chocolate.

And finally: Be at the meeting spot early. Prepare the room and be there to welcome the people.

Sometimes there may just not be time to prepare beforehand. In such cases it is a good idea to use the pattern “Abstract Plan” which is a checklist you have and keep adapting according to your personal experience on the important points to structure a meeting spontaneously.

Abstract Planning (this is a pattern that is still to be documented.):

There are times where you don’t have time to plan the concrete meeting because it happens spontaneously. It is a good idea to keep a checklist for times like these on points to make a spontaneous meeting work. And as soon as you can think of other important things add them to the list.

Don't Meet

„To get something done, a meeting should consist of no more than three people, two of whom are absent.“ Robert Copeland

Context

In the phase before deciding to actually meet.

Problem

A lot of meetings seem to be a waste of time. People coming together, spending time together and there doesn't really seem to be a purpose.

How can one break out of the typical meeting syndrome - meeting out of habit?

Forces

- ◆ It is part of the thing to do to meet.
- ◆ People usually are demotivated when asked to do things that have no purpose.
- ◆ Time is a limited resource.
- ◆ One may seem important if one is in a lot of meetings.
- ◆ Meetings are a way to take a break.

Solution

When in doubt, don't meet. Don't meet if the meeting does not have a concrete purpose or if it does have a purpose this purpose cannot be met better otherwise.

Consequences

1. Benefits

- ☺ You break out of the pattern: "We meet because we always meet."
- ☺ You don't waste your time in meetings that are not to the point.
- ☺ Everyone has more time for other things.

2. Liabilities and Limitations

- ⊗ Meetings are also an important part of a team – building process. Especially in contexts where people tend to work alone at their pcs, meetings can help bring in a personal note. But maybe this can be a purpose of the meeting. Maybe even the sole purpose. If this is so, then one can optimise the meeting to reach the goal.
- ⊗ Also people can't concentrate the whole day. Meetings do help people take a break, but still have their mind on the project.

Implementation¹¹

Is there a clear purpose for the meeting¹²? If there is no real reason to meet, except the fact that we always meet then one should not meet at all.

Should we meet now? An important question to raise is whether it is the right time to meet at the given time. Is all information present? Is every important member available.

Is there a better alternative? Meeting binds time from every member. If one calculates the hourly rate of each participant and multiplies it by the time spent in the meeting one realises how expensive meetings actually are. This does not mean one should never meet. But one should ask oneself if there is a better alternative. If the purpose of the meeting is only to communicate status – it may be more appropriate to use an alternative electronic method.

What if the meeting is not held? What would not be accomplished? How would team members react? How would senior managers react?

Another aspect is: If a theme is very important it is often better to have no meeting than a bad meeting or a badly prepared meeting.

¹¹ Parker/Hoffmann e p. 3

¹² Bischof/Bischof p. 9

Paraphrase

"Talk is cheap, listening is rare."

"Communication is not just saying words; it is creating true understanding."

"Nature gave us two ears and only one tongue which is a gentle hint that we should listen twice as much as we talk."

Context

During a meeting where themes are discussed and there are different opinions on several issues.

Problem

Communication can be difficult. What we hear is not always what was intended. **How can one deal with a situation where there seems to be a misunderstanding?**

Forces

- ◆ What some one means is not necessarily what he/she says and what is said is not necessarily what is understood.
- ◆ Misunderstandings cause conflict.
- ◆ One misses out on important information if one takes one's understanding for granted.
- ◆ Everyone sees the world differently and so everyone interprets problems differently.
- ◆ Misunderstandings are often not apparent.
- ◆ Communication is difficult.

Solution

Repeat the essentials of what the participant said in your own words. Paraphrase what the individual is saying. Repeat what the participant said in your own words and ask. "Did I understand you correctly, that you said..."¹³

¹³ <http://www.colorado.edu/conflict/peace/treatment/activel.htm>

Consequences

1. Benefits

- ☺ Misunderstandings can be cleared up directly.
- ☺ People feel that they are taken seriously.
- ☺ Important information has less chance of being overlooked.
- ☺ Active listening and paraphrasing gives you more authority. If you think about it, who influences you most – the good talkers or the good listeners?
- ☺ Conflict can become productive if one person learns to listen and paraphrase. Because it is then easier to get to the bottom of the problem. This saves time and energy and resources.
- ☺ Using paraphrasing creates a good atmosphere.

2. Liabilities and Limitations

- ☹ This method needs to be used authentically. If people feel they are just being dealt with according to a method, then they will not feel very motivated.
- ☹ This method also has to be practiced.
- ☹ In a meeting it is too time consuming to do this all the time. So chose the situations well.

Implementation

Paraphrasing is simple as far as the outward appearances go. It simply encompasses repeating what the other said in your own words, restating. Maybe setting the comments in another context.

You might also try to summarize the feelings that the person might have. When this component comes in – when the listener shares the thoughts, feelings and beliefs he/she heard between the lines then one uses the name active listening.

Active listening – i.e. talking about underlying emotions etc. is not always appropriate in meeting situations because it can become very personal. This requires a deep level of trust in the group and between the group members.

Paraphrasing encompasses actually focussing on the other person. This is sometimes difficult because people's thought speed is much faster than their speech speed: people can speak at 100 to 175 words per minute but they can listen intelligently at 600

Paraphrase

to 800 words per minute¹⁴. Because of this people's mind can wander very easily when listening to the speaker.

But it is more than that. It is also an attitude – a way of thinking.

It encompasses¹⁵:

- The wish to really understand what the other person is thinking rather than projecting one's own feelings and ideas onto the other.
- The desire to be non-defensive and hereby not have self-protection as the most important thing. When focussing on protecting oneself it is rather difficult to focus on another person.
- The wish to put oneself in the other person's position rather than assuming that the other's perspectives or experiences are the same as one's own.
- Desire to listen and receive and not criticise
- Priority first of all to understand the person rather than to achieve agreement or change in the other person.

Avoid judging people too soon.

When listening avoid rehearsing what you might want to say while listening – because then you can't focus on the speaker's message so well.

Don't try and find solutions while listening because then again you can't focus so well on listening.

Try practicing paraphrasing outside of meetings. Practice does help improve. Analyse yourself and your strengths and weaknesses in communication. A high level of self-awareness is helpful for good communication skills.

When using paraphrasing in meetings it is important not to favouritize who you paraphrase. Obviously you can't spend the meeting paraphrasing what everyone says. You should only use this tool when you think there is potential for misunderstanding. But you should also try and see that there is a balance in the people that are actually paraphrased.

¹⁴ <http://www.mindtools.com/CommSkll/ActiveListening.htm>

¹⁵ <http://crs.uvm.edu/gopher/nerl/personal/comm/e.html>

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Annex: Thumbnails for Part One

Develop A Structured Agenda

Problem

Meetings tend to be poorly organised, lacking in focus and to drift in different directions. In extreme cases during the meeting no one is actually sure what the actual subject of discussion is. At the end of the meeting everyone has the vague feeling that important issues may have been raised but no one is sure if the problem has been solved – as the problem isn't clear. Often the members do not really care – apathy reigns. They just arrive at a meeting and sit waiting for the meeting to end. The leader isn't able to break out of this cycle.

Solution

Develop a structured agenda that states the precise goals, the necessary preparation for each agenda point, the approximate time needed. You could even add the people each agenda point is relevant for. And stick to the agenda.

Do Refreshments

Problem

Meetings can be tedious, stressful and take time. People lose concentration, which hinders the meeting's effectiveness. The overall atmosphere suffers. At the same time many meetings give the impression they were not prepared, that the people and their time are not valued. People who do not feel valued are not as effective.

Solution

Serve light refreshments in order to create a good atmosphere in which the participants feel welcome and important.

Tabulate Your Minutes

Problem

Often decisions reached in meetings are not put into practice or implemented. There is a danger that delegated action points have no effect whatsoever outside of the meeting. After some time not many people can remember what was decided and who was responsible (or they cannot agree what exactly was decided). Even if someone writes minutes and distributes them, this is often done quite some time after the meeting and in a long text that very few people read and is not very concise. This endangers meetings being effective since meetings are not an end in itself and so should have consequences.

Solution

Tabulate your minutes. Collect the important information during the meeting in a short, concise form for example on a prepared sheet of paper or in a document on a laptop which is structured as a table (cf. "Implementation"). The person responsible should read his recorded notes as a summary at the end of an agenda point so any one can say if they disagree or would prefer another wording.

Park Tangential Issues

Problem

Sometimes meetings get off track. At the end of the meeting the participants discover they have been jumping from pillar to post - spending the meeting talking about lot's of different issues that weren't on the agenda without reaching a decision on anything. This scenario often starts out when a question arises while discussing one point of the agenda. Everyone in the meeting starts talking about this other question and discussing it. And so time passes and no decision is reached.

Solution

Note down tangential (i.e. issues that are not directly related to the goal of the meeting) or issues too complex to deal with at once, so they can be dealt with in a later meeting or in another way.

Switch to the Meta-Level

Problem

Sometimes meetings just leave the original agenda – either by participants jumping from pillar to post or by emotional issues. At other times the meeting just comes to a stand still and it seems as if no decision can be raised. Maybe at other times the participants in the meeting are having a lot of fun reminiscing and telling anecdotes – but this doesn't really further the meeting goal. At other times a participant says that another important issue that is not on the agenda has to be decided directly. In all of these scenarios the meeting often gets more chaotic by the minute.

Solution

Transfer the meeting to a meta-level for a moment. Take a time-out and spend a few moments talking to the group about the group situation they are experiencing.