CHAPTER TWELVE

EFFECTIVE MEETING SKILLS I

Chapter Purpose

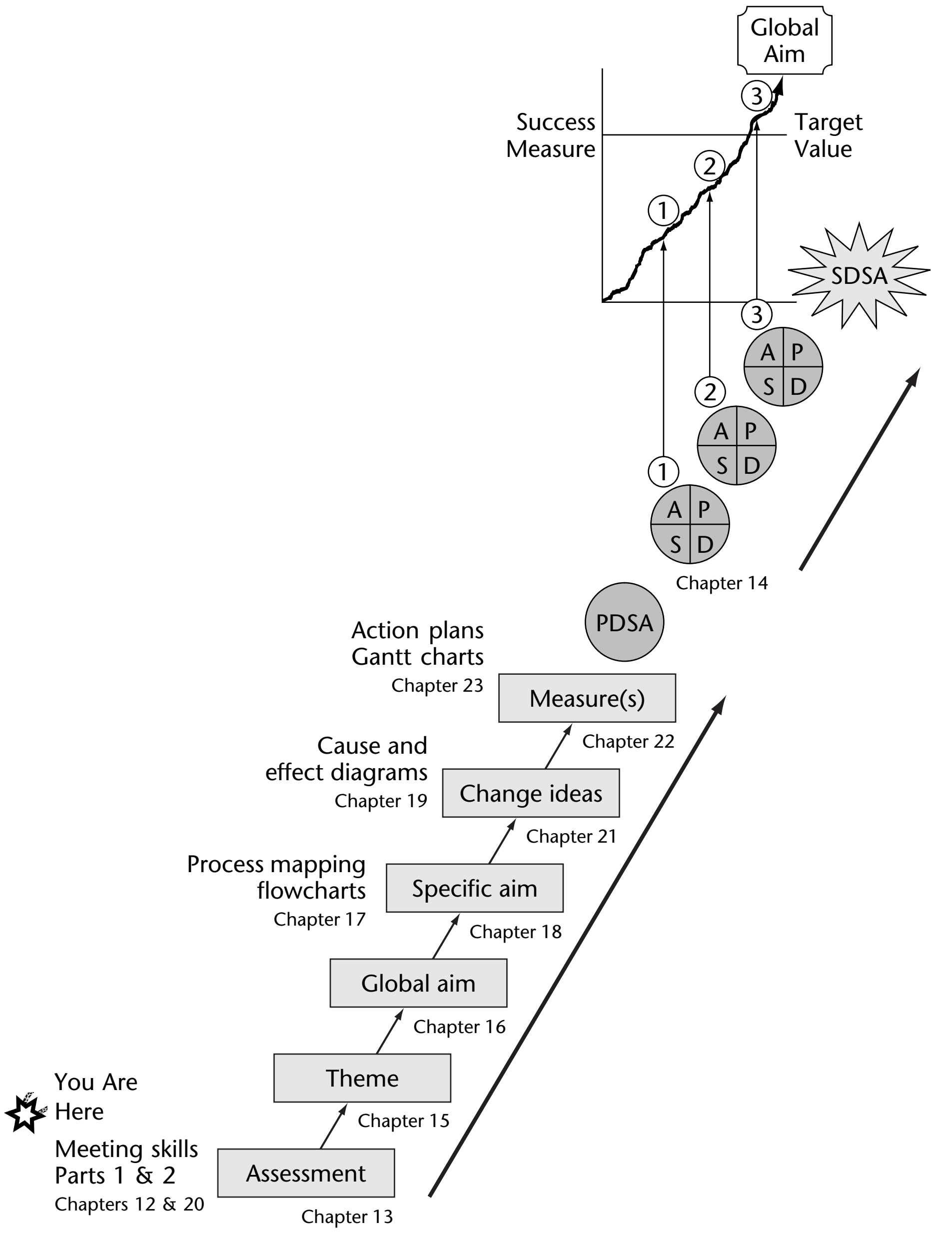
Aim. To identify concepts and methods for holding effective and productive meetings with a lead improvement team.

Objectives. At the completion of this unit, you will be able to

- List the four common roles and functions for effective meetings.
- Describe the meeting process and the seven steps in the agenda template.
- List the work to be done before meetings.
- List the processes to be followed during meetings.
- Create a draft list of ground rules for your lead improvement team members to use when learning how to work together in a meeting.
- Describe the steps for maintaining the rhythm of improvement.

Before your microsystem starts its improvement journey, fundamental organizing should occur to ensure that the interdisciplinary lead improvement team can use disciplined meeting skills and members can succeed in their work together. This chapter addresses an initial set of these skills; later, Chapter Twenty will examine some additional specific useful techniques. (See Figure 12.1.)

FIGURE 12.1. IMPROVEMENT RAMP: MEETING SKILLS.



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Once you identify the members of your lead improvement team, they need to begin using effective meeting skills. A key to successful improvement efforts is developing an improvement discipline with rhythm and pace and with actions that recur daily, weekly, monthly, and yearly—and that make local *sense.* Learning to hold productive and effective meetings is a key part of developing improvement discipline.

What Is a Productive and Effective Meeting?

A *productive and effective meeting* is one that is conducted in a disciplined manner, with active participation from all microsystem role representatives, resulting in clear action items, an evaluation of the meeting, an agenda for the next meeting, and a sense among the members that their time was well-spent. Meeting actions are clearly documented in meeting notes, usually placed on large flipcharts. The meeting is usually conducted with attention to good time management and often is completed within an hour's time, from start to finish.

Why Use Meeting Skills and Roles?

Time is precious. Members of a frontline clinical unit have limited amounts of time for holding meetings and being involved in the improvement of their microsystem. Without discipline, meetings can be disorganized, have limited member participation, end without having set clear next steps, and be perceived as a "waste of time."

Identifying common meeting roles helps members of the interdisciplinary team become more aware of their work together and more skilled in essential meeting tasks. It is helpful to rotate the meeting roles so that each team member can gain insight into the importance of each role and practice the skills of each role.

What Are Effective Meeting Roles?

The four essential meeting roles are

- Leader
- Timekeeper
- Recorder
- Facilitator

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The *leader* of the meeting prepares the agenda, helps the group move through the agenda, and elicits participation from all members. The team's formal leader does not necessarily hold this role all the time because the real purpose of the role is to guide the team through a planned agenda. The meeting leader is also a group member and contributes ideas, interprets data, and participates with other members in making team decisions.

The *timekeeper* works to keep group members aware of their use of time, to help them keep themselves on a schedule with an agreed-on time allotment for each agenda item. If the group makes a prior agreement to it, the timekeeper can verbally announce such markers as the amount of time remaining for each individual agenda item, the halfway point, or when the allotted time for an item is up. The fact that allotted time is up does not mean the work is over, and the group may wish to add time for further consideration of the item while also agreeing on a time adjustment for the other items. The timekeeper role can be intimidating for some team members, due to the sense that announcing how much time is left or that the allotted time has been reached is a controlling function, so it is helpful to make it clear that time management is a shared responsibility—not the SOLE responsibility of the timekeeper.

The *recorder* is responsible for the meeting record, noting the progress of the meeting and listing *next step* items along with their owners and timelines, and so on. The recorder is encouraged to make a visible record, using one or more flipcharts and writing with markers so the whole group can follow the written documentation of the meeting and simultaneously ensure the accuracy of the note taking. It is helpful for the recorder to clearly note next steps, step owners, and timelines as the meeting progresses so that at the end of the meeting the team can quickly review what these steps are and who is responsible for doing what by when. It is also helpful for the recorder to keep a *parking lot,* a list of ideas not related to the current agenda but worth remembering and perhaps addressing in future agendas.

Although not a necessary role for every meeting, a *facilitator* can monitor the group process in order to allow the group to benefit from the contributions of all its members. In high-energy meetings it is easy for some members to dominate or for the group to unintentionally stray from the meeting agenda and to discuss other subjects. If the leader needs help, the facilitator can comment on the group processes at work, pointing out, for example, that a few members of the group are engaged in a tangential or paired conversation or that the discussion is not on track with the meeting agenda, and can encourage the group to stay focused. The facilitator can also note when it is clear that all members of the group are not engaged in the meeting and can suggest ways for the group to get itself back on

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track. The facilitator needs to concentrate on the meeting process and social dynamics; for this reason it may be difficult for the person taking this role to get deeply involved in the topic being discussed.

Can the Leader and Facilitator Roles Be Combined?

Experienced leaders are often able to combine the two roles of leader and facilitator, keeping the agenda moving and on track and also engaging everyone's full participation. However, keeping the roles separate when a group first begins to hold effective meetings helps everyone—especially the facilitator—to understand the benefits of a disciplined group process.

Can the Leader and Recorder Roles Be Combined?

Depending on the aim of the meeting it may be useful to combine the leader and recorder roles. In meetings where processes such as brainstorming or multi-voting are the central activity, the leader and recorder roles can often be combined. Again, this might make most sense when the team has gained experience in using these methods and is comfortable with the roles. Recording is hard work because it involves such careful listening.

Should the Facilitator Be an Outsider?

Not usually; however, there are times when the facilitator should be a professional and separate from the group. This approach may be useful, for example, when the topic evokes a lot of tension or has high conflict potential. Under these circumstances the team might benefit from having an outsider take on the task of balancing the conversation and keeping everyone on track. When team members assume meeting roles, they practice new skills and new ways of working together within an interdisciplinary group. New experiences create new learning that helps produce a new local culture. All too often a clinical team will defer to the traditional leader—usually a physician or nurse; this is especially likely when group members represent a clear hierarchy of roles and jobs. Practicing within a structure of tools and techniques for effective meetings can be important in learning to work together in new and positive ways. For example, when a senior physician is the leader at one meeting and a clinical secretary is the leader at the next meeting, the switch in roles contributes to group members' sense of interdependence and adds to each member's perceived value, regardless of salary or experience.

What Are the Phases of an Effective Meeting?

Think of a meeting as a process consisting of three steps. First, there is a *premeeting phase* in which the meeting date, time, and place are organized. The aims for the meeting and its agenda are also established in this phase, and the next steps assigned during the previous meeting are reviewed.

The second phase of an effective meeting is the *in-meeting phase,* the actual meeting at which the team focuses on and works on the aims. During this phase the team determines the next actions that need to occur, who will *own* these next steps, and what the timeline is for completion.

The third and final phase of an effective meeting is the *postmeeting phase,* in which team members follow through on meeting decisions. The action steps that have been assigned are taken, monitored, and reviewed. Talking with the person assigned to the action step (perhaps during daily huddles), and assessing the process of completing the work, will help the group or microsystem leader keep the overall agenda on track. At times it may be discovered that the next step cannot be completed before the next meeting. At this point the leader of the meeting makes adjustments to the agenda and puts the follow-through action on a subsequent agenda.

What Processes Are Evident in an Effective Meeting?

During the meeting the group engages in the following processes to move through the agenda and to achieve the meeting aims:

- Makes decisions
- Manages time
- Shares leadership
- Listens and contributes
- Manages conflict
- Gives feedback
- Learns new things
- Has fun

What Is the Seven-Step Meeting Process?

Using the seven-step meeting process (Executive Learning, 1993) ensures a disciplined meeting held in an efficient and productive manner. This process spells out how to move through an agenda in an efficient and productive manner. It also

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takes full advantage of the meeting roles previously discussed. Many groups find this disciplined style of conducting meetings restrictive and uncomfortable *at first*. But groups that work through their initial discomfort and persist often cannot then imagine holding meetings using their previous methods because of the tremendous gains in efficiency and productivity stemming from the new methods. Here are the seven steps:

1. *Clarify the aims of the meeting and what the team will get done during the meeting.* Reviewing the aims gives you the opportunity to set reasonable number of topics to be discussed in the time available. Meetings frequently try to discuss and make decisions on too many topics within the allotted time, often only sixty minutes.
2. *Review or assign the meeting roles: leader, recorder, timekeeper, and facilitator.* Many clinical teams have found it beneficial to take the time to determine the leader, recorder, timekeeper, and facilitator for the next meeting, both to save time and to ensure that the premeeting work is monitored and the current meeting's agenda gets set up in advance. Some clinical teams find that selecting a meeting leader for a set period of time helps to ensure the organization of and follow-through on meeting topics. For example, some groups designate a person to be the leader for a month, or another period of time, and then rotate the leader role to another person for a month, and so on.
3. *Review the agenda, and determine how much time to spend on each item.* This helps the group to identify a reasonable number of items for the agenda. With the group present, the leader reviews the items of the agenda and the allotted times for each item. While assigning a designated time to each agenda item, the group may determine it does not have enough time to cover all the items. When this happens, the group may want to move an item to the next meeting's agenda.
4. *Work through the agenda items by discussing and reviewing data and information.* The leader should consciously move through the agenda items one by one and keep the group on track. The facilitator should watch that all members of the group are participating and that appropriate and helpful meeting techniques are being used as needed throughout the meeting. This is especially important for new groups learning new habits for effective meetings. It is easy to revert to old behaviors, such as not taking turns for talking, interrupting, and not inviting participation by all members. The facilitator should alert the group when the discussion is straying from the stated meeting aims.
5. *Review the meeting actions by reading through the (flipchart) record, making changes or additions, and deciding what to keep for the formal meeting record.* The recorder should be tracking agenda items and next steps throughout the meeting. Putting the

notes on a flipchart encourages members of the group to actively review the meeting record throughout the meeting and to ensure that group decisions are being accurately documented. After all the agenda items have been addressed, the recorder should briefly review the meeting record with the team to validate and clarify the documentation.

6. *Plan the next actions, and determine who will do what in the postmeeting phase.* Determine the aims and plan the agenda for the next meeting. This step is essential in staying disciplined and avoiding ending up with too much work for the next meeting. This step also provides the group with clear agenda items in advance of the next meeting and helps establish a visible path forward.
7. *Evaluate the meeting; determine what went well and what could be improved in the future.* This is the most frequently skipped step in the seven-step meeting process. Groups are eager to end the meeting and sometimes will not take a few minutes at the end to evaluate how well the meeting went. However, it is important for group development to take the time to assess how well the group performed the meeting roles and followed the seven-step meeting process. Congratulating the group on following the agenda and times, acknowledging personal improvements that will contribute to future meetings, and offering encouragement to members assuming new meeting roles will all contribute to the growth of the team and its ability to hold effective meetings. Some lead improvement teams use a 10-point perception scale (in which 1 = "poor" and 10 = "best meeting ever") to rate their meetings. At a minimum, feedback from each member about "what went well" in the meeting and "what could be improved" for future meetings is essential. This evaluation process takes less than five minutes.

What Does a Meeting Agenda Template Look Like?

A sample of a meeting template that you could adapt to your own situation is shown in Figure 12.2. Notice that the roles and meeting steps are listed on the agenda. Many groups complete this template for each meeting to remind themselves of appropriate meeting discipline. With repeated use of this template the meeting roles and process become a habit for the group. Interdisciplinary groups often report that using the meeting template feels awkward for the first few meetings but that with practice the meeting roles and process become the norm for the group, making it easier for team members to work together in an enjoyable and efficient way.

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FIGURE 12.2. SAMPLE MEETING AGENDA TEMPLATE.

Meeting Agenda

Department name: ______________________________

Day, date: ______________________________

Time of meeting: ______________________________

Meeting location: ______________________________

Aim of our microsystem:

Leader:
Recorder:
Timekeeper:
Facilitator:
Participants:

Time	Method	Item	Aim or Action
		1. Clarify objectives of this meeting A. B.	
		2. Review Roles Leader: Recorder: Timekeeper: Facilitator or adviser:	
		3. Review agenda and assign times	
		4. Work through agenda items **A.** **B.** **C.** **D.**	
		5. Review meeting record	
		6. Plan next agenda	
		7. Evaluate meeting	

Source: Adapted from Executive Learning, 1993.

What Are the Ground Rules for Meetings?

In one of your early group meetings, put time on the agenda to draft meeting ground rules. As members of an interdisciplinary group planning to meet regularly to discuss and improve processes, it is important for all of you to agree on how you will work with each other within the meeting. Determining how the group members will encourage participation by everyone, learn to listen to one another, and change how they interact with one another contributes to a positive flow and sets helpful guidelines that generate effective meetings.

Groups usually allow thirty minutes or less to brainstorm a list of ideas specifying how members will act during the meetings. Here are some examples of ground rules that teams have adopted:

- Practice not interrupting each other.
- Work to include others' ideas.
- Treat other team members the way you would like to be treated.
- Try not to repeat the same point—even if you did not get the response you hoped for the first time you said it.
- Practice not defending previously held viewpoints—suspend them for a while; you might learn something new.
- Try not to be too nice at the expense of rigor—help the group progress in its thinking.
- Practice forgiveness for new ideas and ways of learning that do not seem to work as well as they might eventually.
- Laugh a little.

Some additional ground rules to consider come from Nabil Musallam (personal communication, 2003) at the University of California's Davis Medical Center:

- Participate in the meeting and not in the hall.
- Speak to the agenda item being discussed.
- Plan your words to conserve time.
- Clearly state opinion or fact—if it is a fact, give the references.
- For opinions, use only "I" statements, unless you have permission to speak for the "we."
- If you oppose, you must propose.

Many groups have found these examples helpful in drafting their own ground rules. Once a team has established ground rules, it is helpful to display them during every meeting to remind members of what they all have agreed to. It is also helpful to periodically assess how well meetings are following the ground rules.

Note that it is the responsibility of all the members to hold each other accountable for the agreed-upon behaviors.

What Are Some Tips for Getting Started with Productive Meetings?

Once an interdisciplinary lead improvement team is identified, it is important to contact the members and determine a *regular* day, time, and place to meet. Having a regular schedule and logistics eliminates confusion and uncertainty about when and where each meeting will be held. The meeting becomes part of people's regular routine. Because of the importance of the work the group is trying to improve, meetings should be held weekly or every other week. There will always be action items to follow up on as well and next steps to be identified.

Create a method for keeping members who cannot be present at a meeting informed and up to date. Some groups, for example, use the *buddy system* to ensure that information and decisions are shared with everyone. Other suggestions include making a speaker phone and conference line available for group members to call in to the meeting to save travel time.

The tools and supplies that support effective meetings can be organized and made readily available by maintaining a *goodie bag,* or *meeting toolkit.* Many groups have found the following list helpful; it indicates the materials and supplies that should be readily available to accomplish various meeting processes:

- Large markers to use on flipcharts
- Pads of flipchart paper (the self-adhesive type is very useful)
- Masking tape to post flipchart sheets that are not self-adhesive
- Post-it Notes (large and small)
- Small markers, such as Sharpies, to write on Post-it Notes so they can be read from a distance
- Graph paper to chart data
- Tacks to post flipcharts on bulletin boards
- Stopwatch to measure time
- Fun items like play dough, Koosh balls, and other hand toys that group members find helpful for restless hands

To set the scene for a successful meeting, arrive early and set up the flipcharts and materials for the meeting. Always strive to start and end on time. This courtesy demonstrates respect for the group members.

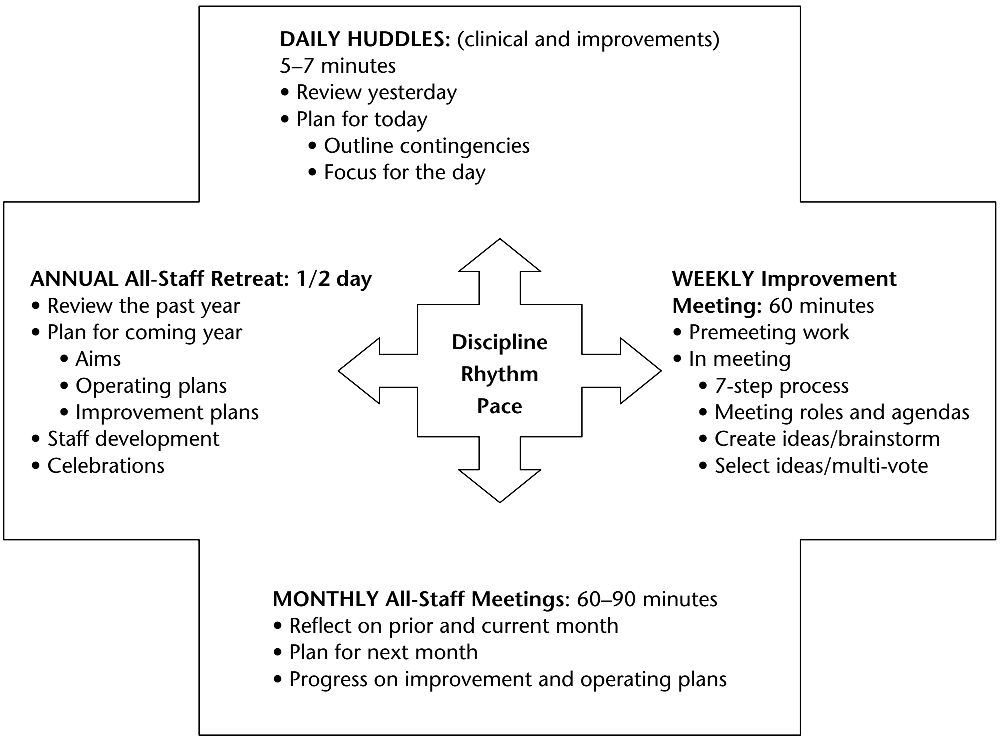
The combination of using effective meeting skills and roles and starting and ending on time will help your team hold successful meetings. At the same time, members of the group will be developing new skills and discipline in holding meetings and learning to work together in more productive ways than they did formerly.

How Do You Keep a Rhythm of Improvement?

The rhythm of improvement can be maintained through various types of regularly planned events so that staff develop the discipline and pace of improving daily, weekly, monthly, and yearly, with a focus on providing care while improving the care (see Figure 12.3). These events include

- *Daily* five- to seven-minute huddles to convene the clinical team and to make operational and improvement plans for the day
- *Weekly* sixty-minute lead improvement team meetings
- *Monthly* all-staff meetings to share improvement activities and discuss processes of care, outcomes, and improvements
- *Yearly* all-staff retreats to reflect on the past year and plan operations and improvements for the future year

FIGURE 12.3. RHYTHM OF IMPROVEMENT.



Case Studies

Intermediate Cardiac Care Unit (ICCU)

During the three-day microsystem learning program, the ICCU's lead improvement team decided to hold its weekly improvement meetings on Wednesdays, from 1:30 to 2:30 P.M., in the ICCU conference room. Team members made a commitment to use the new meeting skills and improvement tools on their path forward and established these ground rules:

- Standard set meeting time.
- Honor the time.
- Start and end on time.
- Be prepared.
- Turn cell phones and pagers off.
- No interruptions.
- Stick to the agenda and issues.
- No sidebars or social conversations.
- If you oppose, you must propose.
- Everyone participates.
- Come to the meeting with an open mind.
- Respect everyone's ideas.

Figure 12.4 displays a sample ICCU meeting agenda.

Plastic Surgery Section

The weekly lead team meetings are held on Wednesdays from 11 A.M. to noon in the outpatient clinic's conference room. The team has held its meetings faithfully since 2003, whether all members are present or not. Team members have found they always have improvement data and processes to review, and because the meeting leader role rotates among them, the meetings just naturally flow as part of their work. When the Plastic Surgery lead improvement team started its improvement journey, members agreed on these ground rules:

- Consistently hold weekly meetings on Wednesdays at same time.
- Practice effective meeting skills, including roles and timed agendas.
- Work to be inclusive during the meeting.
- Interdisciplinary involvement is key to successful improvements.

FIGURE 12.4. SAMPLE ICCU MEETING AGENDA.

ICCU Redesign Agenda—ICCU Conf. Room
1:30–2:30 P.M.

DATE: Wed., March 22

TIME	OUTCOME	MEETING PROCESS
		A. Identify meeting roles:
2 min.		Leader: Shelly Facilitator: Margie Time Keeper: Jean Recorder: Ed Guests: Melanie, Dave
		B. Work through agenda items:
5 min.		1. Attending debrief rounding process week 4—Dr. Dave: What's going well?
5 min.		Other staff input: What's going well? What could be improved? (attending and group)
5 min.		What is the role of the facilitator?
5 min.		2. Review PDSA 3b: ran the post-call patients first (facilitator represents the RN) to get them out on time, then POD to POD with the RN.
10 min.		4 P.M. "run the list" global rounds: Who's going home tomorrow? What is our goal? What do we want to measure?
5 min.		3. Summary of what we have learned to date.
10 min.		4. Create PDSA 4??
5 min.		5. How best to communicate to staff.
5 min.		6. Global aim statement–finalize!!
		C. Review meeting record and plan next agenda—evaluate meeting:
5 min.		***Assign roles:*** 1. 2. 3. Future agenda items: Mission statement

Note: POD = a geographical place in the ICCU consisting of a group of patient rooms.

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Review Questions

1. What roles support effective meetings?
2. What is the seven-step meeting process?
3. How can ground rules support effective meeting skills?
4. What materials are likely to be needed for team meetings?
5. What can you do daily, weekly, monthly, and annually to establish improvement rhythm?

Between Sessions Work

1. Conduct sixty-minute meetings with an interdisciplinary lead team using effective meeting skills.
2. Use an agenda to hold a meeting to brainstorm a draft set of ground rules.
3. Identify a place and time to hold weekly lead improvement team meetings.

Reference

Executive Learning. (1993). *Continual improvement handbook: A quick reference guide for tools and concepts.* Healthcare Version. Brentwood, TN: Author.