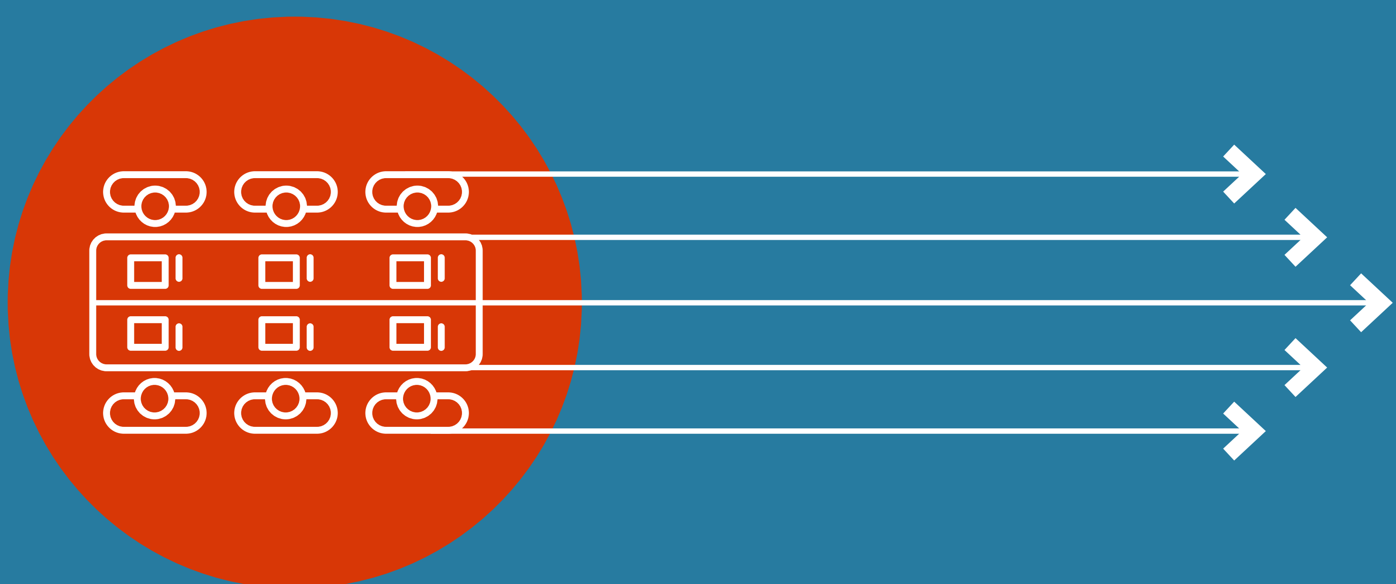
The Lucid Guide to High Performance Meetings



The Lucid Guide to High Performance Meetings
Part 1 PREVIEW
written by Elise Keith
with contributions by the Lucid Meetings team and reader community

A Note to Readers from the Author

Hi there,

I want to thank you for downloading this preview of the *Lucid Guide to High Performance Meetings: Part 1*. I hope you find it useful, and more importantly, that you'll share your thoughts and feedback with us.

This is a work in progress. When complete, the finished *Guide* will include 4 parts and a host of resources for people looking to establish a high-performance meeting culture. Part 1, which you're previewing now, provides a conceptual grounding for understanding the role of meetings in an organization. Parts 2, 3, and 4 will cover how to put these concepts into practice.

It's a bit scary to share something when you know it isn't done. But a lesson I've learned from my work on high performance meetings is that the outcome is always better when you invite participation. Overhauling an organization's meetings is a big challenge, and this guide is meant to make overcoming that challenge possible for more people. Tricky stuff; I'm going to need your help.

Why this guide now? When we started Lucid Meetings in 2010, I thought I knew pretty much everything I needed to know about running meetings. Create an agenda, take some notes, send out the follow-up, and done! Sure, there were tricks and techniques to learn, and all kinds of fun to be had with sticky notes, but the basics seemed—well—pretty basic. And frankly, a little boring.

To build awareness for our software platform, I began blogging about meetings in October 2011. I soon realized there was more going on than I thought, so in 2014, I took my first intensive facilitation training. Eye opening!

We started to collaborate with other meeting experts. In 2015, we published our first meeting agenda templates. In 2016, we launched the Effective Meeting Results program, consulting with clients to improve not just one meeting here and there, but their overall meeting culture. This year, I represented the software and practictioner perspective at the The Gothenburg Meeting Science Symposium, the first ever attempt to bring together meeting researchers from the social sciences and industry. (Fascinating note: we couldn't agree on a definition for the word *meeting*.) Most recently, Lucid Meetings was named a Gartner "Cool Vendor" in Unified Communications. It's been quite a journey.

At Lucid, we've learned so much from so many people. It turns out that while there are some basic principles everyone should know about meetings (far too few do), this is one of those topics that goes deep. Meetings sit at the intersection of business management, productivity, and culture, all of which are evolving rapidly. I found that the simple view I had when we started was based on a host of popular-but-wrong assumptions, and that I had grossly underestimated the impact a team's meeting practices have on their success.

Our website is full of the meeting research, tips, and techniques we've learned over the years, and while there's a lot there, it's not organized in any particular way. Readers frequently ask where they can "get the book" version of the content they're finding on the blog. This Guide is my attempt to pull what we've learned into a useful whole.

Again, I look forward to your feedback! My email is below.

Thank you,
Elise Keith
elise@lucidmeetings.com

Don't be shy!
I'm friendly & I love to learn. Let's have a fun conversation about meetings!

Part 1: Understanding Meetings

Part 1:
Understanding Meetings

Introduction

Why invest in meetings?

Meetings are a means to an end. We do not create teams and organizations and businesses so that we can meet. We meet so that we can create successful teams and organizations and businesses.

Meetings are fleeting. 20 minutes here, a few hours there. Created by you and imposed on you as brief interludes in the larger flow.

So if meetings aren't the point, and if they're all temporary at best, why focus time and energy into mastering them? Why invest in a high performance meeting culture?

Here's why:

- Organizations can't operate or scale efficiently without meeting. If you hold a leadership, management, or collaborative role, you'll spend a huge portion of your time in meetings. Don't let that part of your life go to waste.
- Meetings are the one systemically addressable habit shared by and impacting every part of the business. If you're looking for a way to invest the least effort for an outsized reward, this is it.
- It's where the action is. Teams make sense of their work and their relationships with each other in meetings. The decisions and battles and discoveries all come together when you meet.

What makes a meeting high-performance?

High performance meetings accelerate the performance and improve the well-being of participants. Specifically:

- Meetings are a tool. Their function is to connect people and move work forward. So, like a spatula or a vacuum cleaner, you can evaluate a meeting's basic effectiveness on how well the tool did the job.
- For any specific meeting, the job to be done may be expressed as a set of rational and experiential aims. Simply put, the meeting must create a tangible result and feel like a good use of time.
- An effective meeting produces *meaningful* outcomes. These may or may not always exactly match the desired outcomes, but they will be related and they will have moved the group ahead.
- High performance meetings achieve all of the above with a minimum investment of time, effort and drama.

High performance meetings are both effective and efficient.

Why now?

The modern economy deals in information and advances through innovation. New knowledge, inventions, and perils develop at rates our predecessors never imagined possible. The challenge is no longer simply what you can do that your competitors can't. Rather, it's about how quickly you can learn, adapt, and create. The increasing rate and volume of information flow make it impossible for any one individual contributor to manage it alone.

High performance meetings establish respectful relationships between participants and efficiently synthesize information. They pool the resources, talents, and knowledge of all participants to surface new ideas and make informed decisions quickly.

In a slower world, meeting performance was an aspiration. In today's economy, it is an essential capability required for organizational health.

We have a growing body of research which shows that the impact of improving meeting performance extends far beyond the conference room.

> "At a financial and regulatory consultancy we studied, for example, three months after managers began to rethink the firm's approach to meetings, a survey showed that employees perceived significant improvements in team collaboration (a 42% increase), psychological safety to speak up and express opinions (a 32% increase), and team performance (a 28% increase). Other aspects of organizational life improved as well, and respondents' ratings of satisfaction with work/life balance rose from 62% to 92%."
>
> – *from* Stop the Meeting Madness *, HBR July—August 17*
> *by Leslie A. Perlow, Constance Noonan Hadley, Eunice Eun*

Google's research on high performance teams found that the most successful groups were not those composed of outstanding individual contributors. Instead, the best performance was seen in teams that established psychological safety and developed mature collaboration skills, much of which gets established in team meetings.

On the other side, a research group from Germany found that ineffective meeting behavior had an outsized negative impact on team performance, and that this impact could be traced directly to the performance of the larger organization.

> "Teams that showed more functional interaction, such as problem-solving interaction and action planning, were significantly more satisfied with their meetings. Better meetings were associated with higher team productivity. Moreover, constructive meeting interaction processes were related to organizational success 2.5 years after the meeting. Dysfunctional communication, such as criticizing others or complaining, showed significant negative relationships with these outcomes. These negative effects were even more pronounced than the positive effects of functional team meeting interaction."
>
> – *Kauffeld, Simone & Lehmann-Willenbrock, Nale. (2012).*
> Meetings matter: Effects of work group communication on organizational success.
> *Small Group Research. 43. 128-156*

In our work with clients, we've heard how ineffective meetings impact people's lives outside the office. When meetings are chaotic, interruptive, and unpredictable, people report spending more time working after hours, more stress, and declining health. One client we interviewed even blamed the company's meetings for his alarming weight gain and Irritable Bowel Syndrome. You know that can't be good.

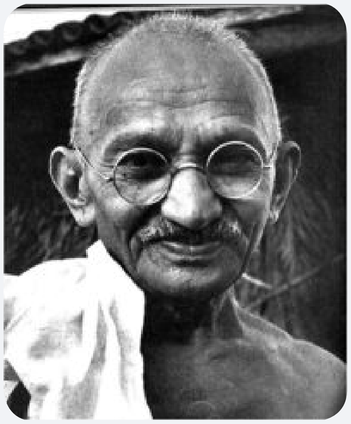
As a society, we no longer have the time, attention span, nor tolerance for ineffective meetings. The negative impact bad meetings have on an organization has grown.

On the other hand, organizations with high-performing meetings don't talk about them the same way. In fact, people in these organizations don't really talk about meetings much at all. Instead, they talk about the ideas, the decisions, and the challenges they tackle in meetings.

One benefit from establishing high performance meetings is that you don't have to talk about your meeting problem any more. The organization knows how to meet, does it well, and can get on with the business at hand. The focus returns back to achieving the goal, and away from the meeting mechanics required to get there.

How you meet is who you are.

How we talk about our work changes the work.



"Your beliefs become your thoughts,

Your thoughts become your words,

Your words become your actions,

Your actions become your habits,

Your habits become your values,

Your values become your destiny."

– *Mahatma Gandhi*

When *you* becomes *we*, meetings are where we join our thoughts, share our words, and decide on the actions we'll take. The way we conduct ourselves and treat each other in meetings becomes a habit that expresses our shared identity; no matter what we might see written in the corporate handbook, our true values become apparent in our meetings.

> "The structure, aliveness, deadness, whisper or shout of a meeting teaches and persuades us more about the culture of our workplace than all the speeches about core values and the new culture we are striving for …
>
> What we call meetings are critical cultural passages that create an opportunity for employee engagement or disengagement."
>
> – *Peter Block, in the foreword to Terms of Engagement: New Ways of Leading and Changing Organizations*

High performance meetings drive high performance organizations. Part 1 of this guide covers what you need to understand about meetings to bring this performance to your organization.

Chapter 1

Creating a Foundation for Changing Your Organization's Meetings

For leaders and participants both, effective change requires a plan. Learn why the meeting improvement approach used by most organizations rarely works, and how this book will help you create a plan that will.

Many people are unhappy with how their meetings work. Some of these people try to improve their meetings.

Of those who try to improve their meetings, some achieve dramatic results. Sweeping, business-changing, revolutionary improvement. Others make small gains. One or two meetings run better, but the rest never rise above mediocrity.

Then there are those who experience a momentary burst of effectiveness, which slowly deteriorates. The status quo reasserts, and the energy to change dissipates.

Why Some Succeed and Others Fizzle

Many organizations recognize they have a problem with their meetings across the board. When every department and every team is impacted by one or more meetings that takes up more time than it's worth, it's natural to assume that either meetings don't work or that the people running those meetings must not know what they're doing.

The Trap of Convenient Myths

There are two common myths that undermine improvement efforst, and prevent some people from even trying to improve their meetings in the first place.

Myth: Meetings suck.

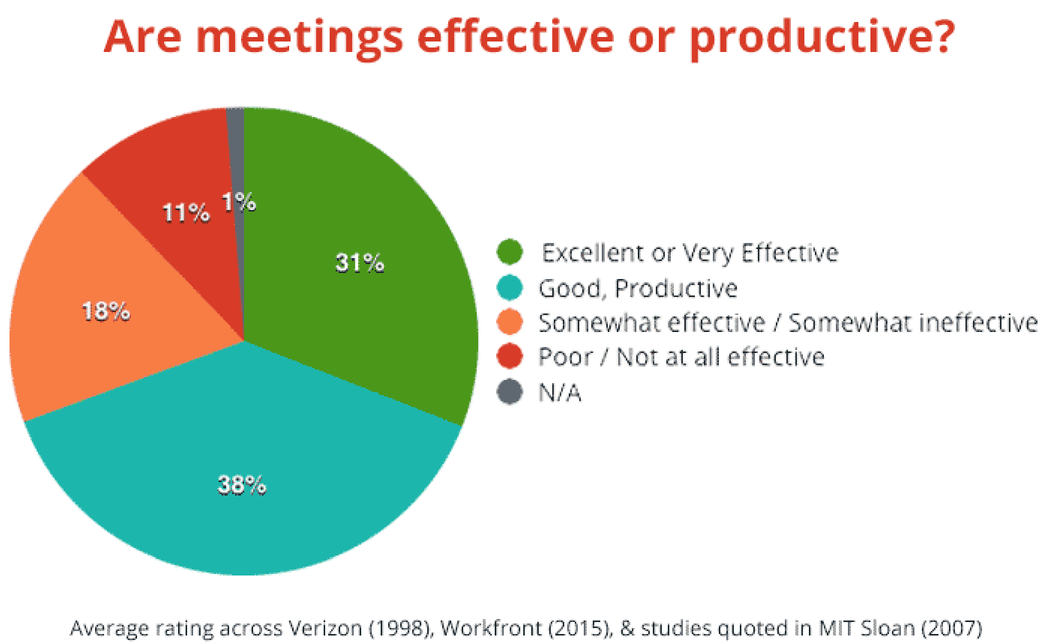
Spend any time searching the internet for advice about meetings, and you'll find thousands of articles about how people hate meetings. You'll also find statistics claiming that over half of these meetings are considered a "waste of time" by the people in attendance.

When someone facing a meeting problem buys into the idea that meetings are a "necessary evil", they believe that bad meetings are intractable. They begin to think that working to improve meetings is largely pointless (clearly, they all still suck for everyone, so why bother?) and that they're probably better off meeting as little as possible. Many people saw and shared these articles as the evidence they needed to cancel their meetings, and avoid the work involved in learning to run better ones.

We see organizations proudly claim "they don't do meetings", as they opt instead to share all their information through email or group chat—using interrupt-driven ways of communicating that research shows to be a much bigger hit on productivity than the meetings they replace.

The belief that people hate meetings and that most meetings are a waste of time is a myth.

We reviewed the research and found that, in fact, **the data shows people believe the vast majority of their meetings are worth attending.**



Only 12% of meetings are considered totally ineffective.

Bad numbers lead to bad assumptions and bad decisions. The majority of meetings work OK, and only 30% or so are truly awful. That's not what you'd want to see in a high-performance organization, of course, but it's also not an insurmountable challenge.

This means that when you start your efforts to establish a high-performance meeting culture, you are not starting from scratch. Don't let the haters tell you otherwise.

Myth: Change management doesn't work.

Here's another oft-quoted and convenient myth that gives us an excuse to avoid change.

The statistic touted most often claims that 70% of change efforts fail. This, too, is baloney.

In a July 2017 article for Harvard Business Review, Nick Tasler dug into the available research and found that "only 1 in 10 are strikeouts," meaning that **most change efforts succeed at least to some degree.**

Efforts to change an organization result in change. Whether that change improves performance, and whether it sticks, will depend on many factors, one of which is how much defeatist rhetoric the team buys into.

Organizations that successfully create a high-performance meeting culture reject these myths.

The Trap of Knowledge Worship

When faced with a need to improve meetings, many organizations seek training. The champions for change will read books on how to lead better meetings. Leaders send their project managers and department managers to days of facilitation training, where they learn how to plan a session, monitor time, and manage dysfunctional meeting behavior.

Knowledge is a good thing, and expert training provides a solid grounding for building out a larger plan. Unfortuately, many organizations invest in the workshops and guest lectures, and that's where they stop.

The success of change starting with the acquisition of knowledge depends on:

1. a clear plan for putting that knowledge into practice,
2. the individual talents of the people doing the learning,
3. the applicability of the training to the team's specific work context,
4. the willingness to adapt and the participation of the other people in meetings, and
5. consistent modeling and reinforcement of new practices by leadership.

If the people sent for training lack the desire or ability to overcome barriers to the change, or if leadership fails to "walk the talk" when they meet, the effort to change the organization's meetings fails.

More often, we see that sending individuals for meeting skills training, while well intentioned, misses two fundamental points.

1. **Meetings are a team activity.**
   The goalie is important, but you can't just train the goalie and expect to win the hockey match.
2. **Meeting effectiveness is specific to the context in which it is held.**
   Training people to be great goalies doesn't help them win at figure skating. While both sports share some common skills, true excellence requires learning way more than how to lace your skates.

Success Requires a Systemic Approach

The way an organization meets is a fundamental part of the culture, touching nearly every person, structure, and business process. To achieve high-performance meetings, you must look at how these meetings operate as part of, and in conjunction with, the other aspects of the organization.

Yes, the individuals involved need skills, just like individual drivers on the road need basic mastery of their vehicles. But for an effective transportation system, we need more than skilled drivers. We need well-designed routes that efficiently connect different business centers, traffic signaling to prevent accidents, regular maintenance to keep roadways smooth, and a way to bring new drivers safely into the flow. Some locations demand highways, others bike paths. When the system is poorly designed, no amount of skilled driving can avoid gridlock and accidents.

This is why basic meeting training alone fails to create lasting change. Learning that you need an agenda or that you should recap next steps at the end of the meeting is generic good advice. It's like learning to drive the speed limit and stay to the right – not wrong necessarily, but inadequate for navigating through uncertain conditions and problematic if the speed limit isn't posted or if you find yourself driving in a new country. The generic "rules" only go so far.

Meetings are one of the crucial ways we direct and route information in our businesses, and to work optimally, they need the same kind of well-considered systems design to keep information flowing. You need a systemic approach to effect a meaningful change.

The good news: nowhere else in your business can you work on improving one activity and have such a widespread impact. Meetings are what experts consider a "keystone habit": one that, when you get it right, it creates dramatic improvements in every other part of the organization.

If you can fix your meetings, you can revolutionize your business.

What it takes to improve meetings

Over the years, we've seen what it takes to create change that sticks. Here's the short version:

The change must be specific.

A program for improving meetings-in-general does not work. This is like working to fix "food" in general rather than focusing on how to create a healthy breakfast. Instead, successful organizations target specific meetings for improvement, and establish contextually appropriate markers for success.

The change must be led.

Interpersonal relationships and power dynamics can't be ignored in meetings. No amount of careful agenda planning or skills training can compete with the leader who arrives late, dominates the discussion, and disregards the agenda. This does not mean that change has to start at the top, but it must be embraced there to succeed.

The change must be supported.

You cannot achieve mastery overnight. Leading and participating in high-performance meetings requires skills that take time to develop. Planning and preparing for a successful meeting also takes more time than blowing through a lousy one—especially in the beginning. Organizations that acquire this mastery support its development through training, policy, process, and technology designed to make it easier to achieve the necessary level of meeting quality.

The change must be reinforced.

Better meetings is not a one-and-done endeavor. Happily, there's always another opportunity coming where you can reinforce high-performance meeting habits. Successful organizations extend this reinforcement with regular reviews and updates to meeting practice.

Anyone familiar with classic change management will find this list obvious. What's less obvious is this: when it comes to changing how an organization meets, people struggle most with the first requirement.

Organizations don't know how to get specific enough about meetings to succeed. To get specific, you must establish a shared vision of what success looks like, and create a plan for change that makes it very clear what everyone needs to do for the change to happen. Also because meetings involve everyone, this is a vision that must be shared with everyone, not just those charged with leading meetings.

Laying the Foundation for Successful Change

Like any project, the effort to change how an organization meets should begin with a vision of what this change will make possible.

When asked, most people are very good at identifying what doesn't work well in their meetings. We're keenly aware of all the problems. That said, many people don't have a clear idea of what a good meeting looks like, nor what consistently effective meetings might do for them. No surprise: I've read dozens of excellent books on running better meetings, and I can say with confidence that there is no strong shared vision of success that applies to all meetings.

Without this vision—without understanding "what do you expect me to do here and what's in it for me" - it's virtually impossible to get everyone bought in to making the change.

> "The only way that we can live, is if we grow. The only way that we can grow is if we change. The only way that we can change is if we learn. The only way we can learn is if we are exposed. And the only way that we can become exposed is if we throw ourselves out into the open.
>
> Do it. Throw yourself."
>
> – *C. JoyBell C.*

Meetings are a tool used to help a group work together. When you understand what this tool is good for, and what it is not, you can begin to envision how it can best be applied. To get specific, you need a mental model for planning your meetings, including:

- **Meeting Strategy:**
  What meetings are for; the underlying function of meetings in the workplace
- **Meeting Execution:**
  How to plan and run meetings so that they achieve that function
- **Meeting Cadence:**
  How often and how long to meet to maintain that function

- **Meeting Performance Maturity:**
  What it looks like when you evolve meeting performance across the organization

With these fundamentals in mind, you can then get specific about the plan for all the important meetings. This is meeting design, where you get explicit about:

- Which meetings do we need to run and why? What is each meeting for?
- How will we run those meetings?
- What do we need to put in place to support those meetings?
- Given this new approach to meetings, what does each person need to do differently going forward?

Without a vision and a plan, the potential scope of change is limited.

Getting Started

> "A year from now you will wish you had started today."
>
> – *Karen Lamb*

The remaining chapters in Part 1 cover the mental models and frameworks we use to design meetings, and that we've seen work well for other organizations.

Chapter 2

Why meet? Understanding the Function of Meetings in the Collaborative Workplace

Meetings are a tool—a means to an end. But to what end? In this chapter, you'll learn how the appropriate use of meetings keeps collaborative work and teams running smoothly.

When we work in collaboration with other people, we have two things we have to take care of to be successful.

The work and the people.

In theory, the work should be something we can plan and manage logically. After each piece of work begins, there are a series of tasks to complete and problems to solve that continue on until the work is done.

Also in theory, the people doing the work should be able to coordinate their efforts through a simple exchange of factual information. When Fred completes task A, he marks it done, and Betty starts task B. When Alan runs into a problem with the work, he could write down the facts of the situation and send them to others for help—help they could then offer in any number of ways that do not involve a team meeting.

Clean, efficient, and logical. When the work is well understood and routine, this approach makes sense. The people doing the work click along like a "well-oiled machine." In these situations, there is very little reason to meet.

Of course, the "well-oiled machine" theory of work only applies to jobs that could literally be replaced by one or more well-oiled machines. The order of tasks, environment in which the tasks are performed, and definition of success are all known in advance. The context and the players rarely change, everyone knows what they're supposed to do, and they just get on with it.

When the definition of the work doesn't change, everyone involved has a shared perspective on the work that does not change. Few businesses are that static. The well-oiled machine theory doesn't apply to businesses that need to respond, adapt, evolve, and grow.

The well-oiled machine theory does not apply to collaborative work.

This theory is also just silly when applied to work with people, because people aren't machines that simply receive input and spit out company value. All that "human capital" businesses "leverage" is made up of a host of individual people who've all got their own thing going on.

So, because they're human, when Fred completes task A, he may indeed mark it done. But let's say Betty's cousin is in town and she's taking a few days off, so she doesn't start task B right away. Then, when she gets back she finds 239 new alerts in her inbox and never even sees the note from Fred. The machine breaks down. Later, when Alan runs into that tricky problem with the work, instead of writing it up so the team can help, he spends the first day thinking that he must be an idiot and Googling for answers. When that doesn't work, he picks up a few side tasks to keep himself busy, hoping a solution will "come to him" while he's getting other stuff done. It doesn't, and now it's been days and other things are starting to stack up behind Alan's unfinished assignments. Again, the machine breaks down.

This team needs to meet.

Why Teams Meet

Meetings have one function.

We meet to **quickly create shared perspective** in a group.

Let's pull that statement apart, starting with the concept of a "shared perspective."

Before the meeting, we call the shared perspective we want to create the "**desired outcome.**" Desired outcomes take many forms; the outcome of a meeting can be a decision, a plan, a commitment, a new understanding, an intention, an apology, a resolution, and so on.

When they meet, Fred and Betty will figure out that it's time for her task to begin. If they meet soon enough, Alan will have to share the problem he ran into, giving the rest of the team a chance to either help him or adjust their plans around him before the whole project goes totally out of whack.

The shared perspective created in a meeting doesn't just include what the group agrees to on a pragmatic basis. It also includes what they now know or believe that they didn't before, and how they feel about the whole thing.

When Fred, Betty, and Alan meet, they get a shared perspective on the work—what's done, what's not—*and the people*. Fred will learn that Betty isn't ignoring him, and they can both stop assuming that Alan's a slacker.

Meetings put focus on both the work and the people.

The coaches at Leadership Strategies describe meeting outcomes in terms of the "Hand, Head, and Heart." They teach us to think through what each person should leave the meeting with "in their hand"—the tangible or documented result, "in their head"—new knowledge and understanding, and "in their heart"—meaning how we hope people will feel at the meeting's end.

As many people have pointed out, though, there are other ways to create shared perspective. Email, reports, books, chat, video can all work—and we certainly can't just meet with all the people all the time when we want to communicate our thoughts and feelings. **Given all the alternatives, why meet at all?**

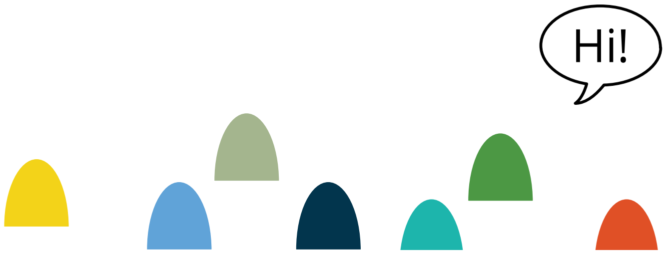
The key is the word "quickly." Meetings quickly create shared perspective. When well executed, the other adjective I'd add is "reliably," as no other communication tool gives you the same level of clarity and control that a meeting can.

Let's take a look at our mental model to help illustrate that point.

Direction, Momentum, and Force: A Visual Model for Understanding Meeting Function

At Lucid, we have a mental model we use when designing and running meetings. After looking at Anders Ericsson's *Peak: Secrets from the New Science of Expertise*, I've been fascinated by how important and useful having a mental representation can be.

In this case, I find it's easiest to understand what meetings do for teams with some simple visuals. In the diagrams below, the little half-domes represent the people on the team.

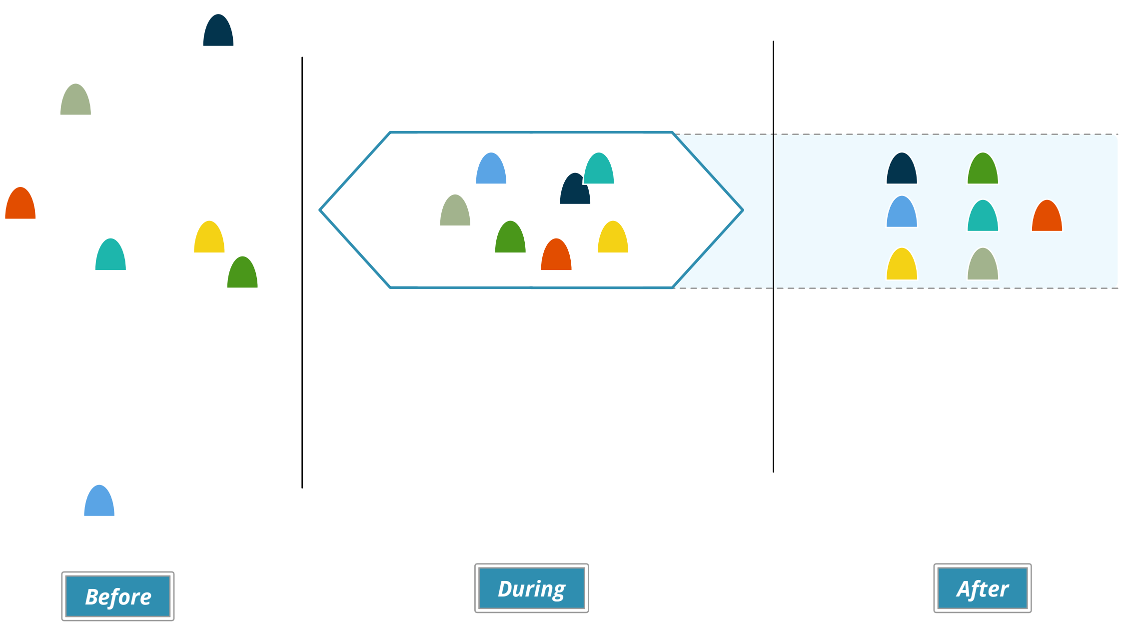


Meet the team.

Before the very first meeting, the people are all out there just doing their own thing.

During, they come together to explore the work at hand.

After the meeting, they leave with a shared perspective on the work and begin to move in a coordinated way towards a common goal.



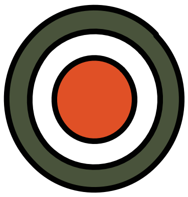
Individual perspectives get aligned so the team can move forward together.

Most meetings last less than one hour. On the overall work timeline, an hour is a blink. This is where the "quickly" part of our meeting function shines. Meetings *quickly* create shared perspective in a group.

By contrast, when we look at how long it takes for a team to get coordinated by email, our only guarantee that the total elapsed time required is less than an hour is if we have each one constantly checking email. That doesn't bode well for their chances of getting much else done, does it? Most tasks require periods of uninterrupted focus; something group chat and email aren't designed to respect.

The Function of a Meeting

Because all the people start in different places, **effective meetings start by focusing the group** and bringing them in to the conversation.

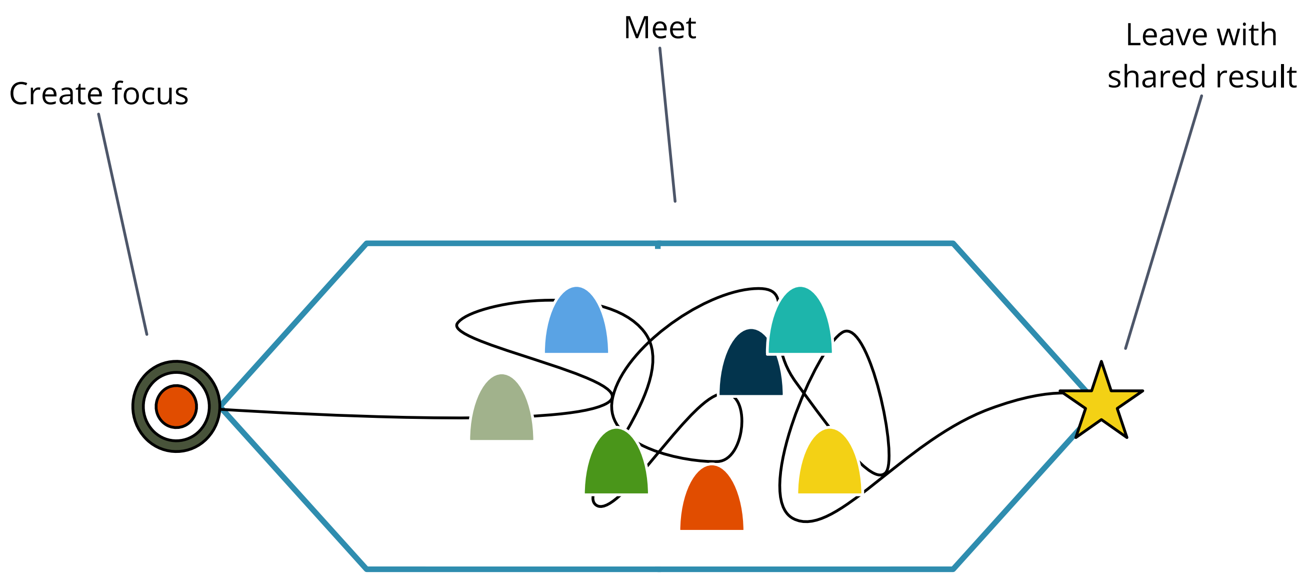


Start the meeting by focusing the group's attention.

Once the group is focused, they can move into the main part of the meeting.

Storming, forming, and norming. Divergent, emergent, convergent. These formalisms are ways of describing what happens between a group of people in a meeting as they explore and align their unique perspectives.

The path the conversation takes during the meeting depends on the desired outcome; it can get pretty messy while all those individual perspectives navigate their way to a mutually understood and agreed outcome.

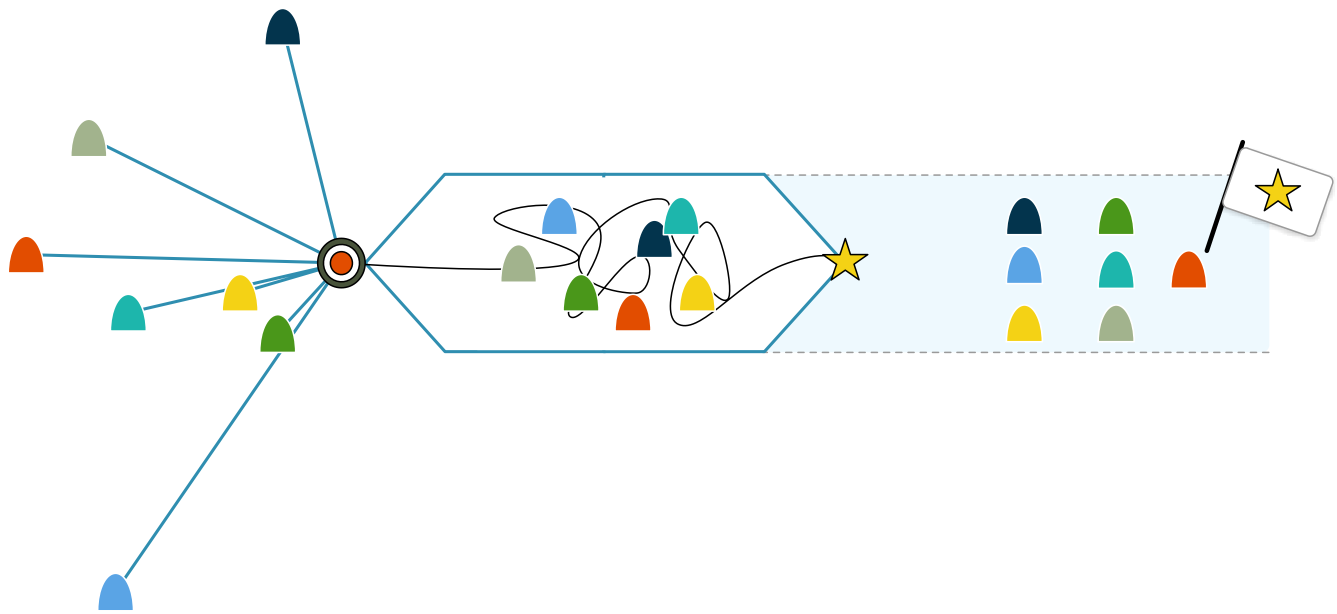


How meetings work: focus the group, find a shared perspective, focus the outcome

Then, once this desired outcome is achieved, **an effective meeting ends with a clear and focused review of the result**.

A gold star for achieving the desired outcome!

You can visualize the meeting as a force that *pulls* people together, gets them aligned, then *pushes* them towards a shared goal.

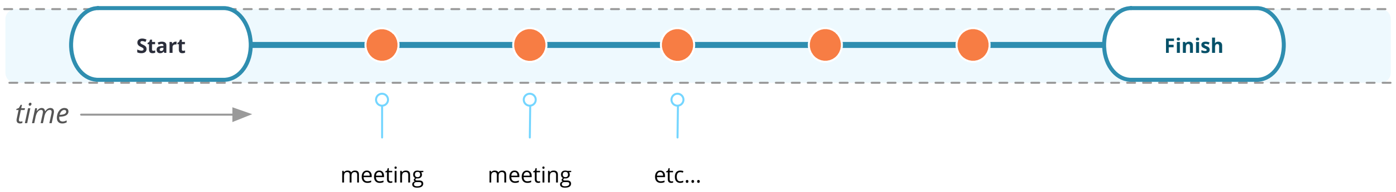


Everyone sets forth together, their goal clearly before them.

Why Teams Have Lots of Meetings

In a perfectly harmonious and stable world, our team could meet just once to get that shared perspective, then happily flow down that straight path to done. Well-oiled machine and all that.

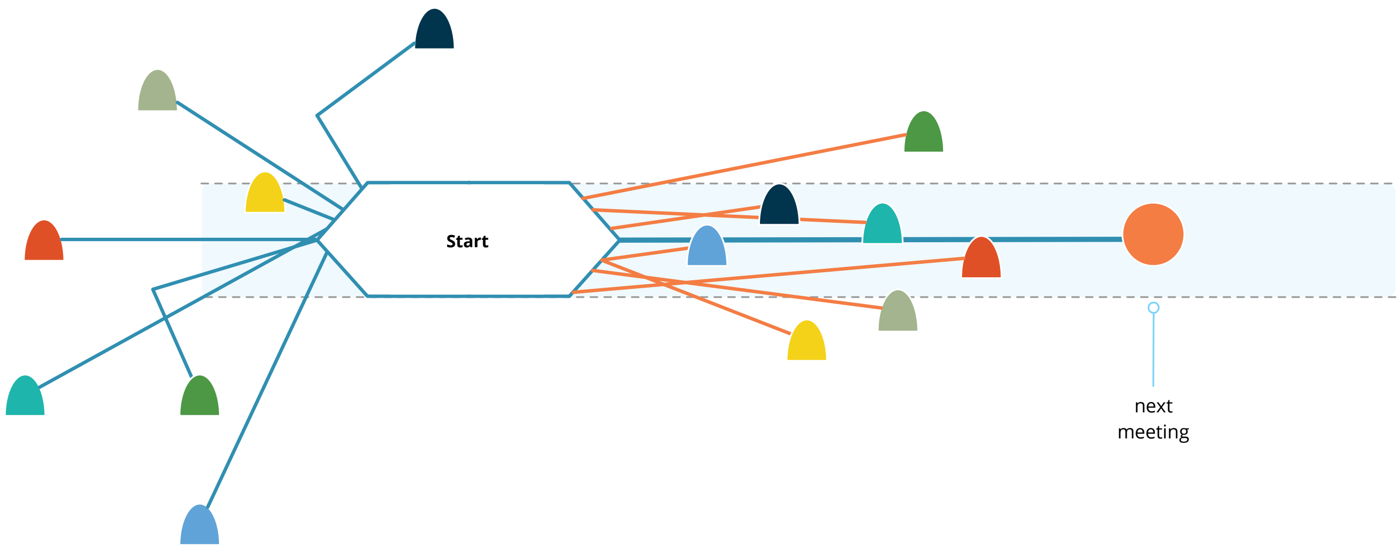
That is not the world we live in, so naturally that never happens, and we need more meetings. If we visualize the meetings scheduled for a typical project on a timeline, it might look something like this.



Meetings in a typical project timeline

(Note: I'm using the term "project" here to represent any goal-oriented work a group might undertake. The same concept applies whether your team writes standards, builds products, drives corporate strategy, or hosts an annual bake sale.)

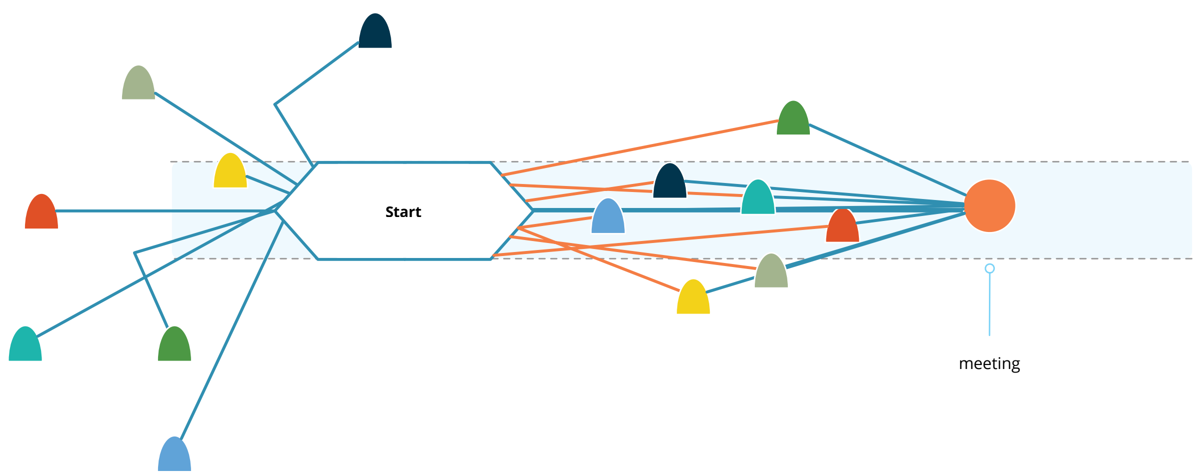
With our pull-push visual in mind, we can zoom-in on this timeline to look at what's happening with the team at the beginning of the project.



Zooming in on the first team meeting

Like we saw before, that first meeting pulls the group together and sends them out on the path. But this time, we can see that while all the people are headed in basically the same direction, they're not all moving at the same speed or at quite the same angle.

In other words, they are people with all their individual skills and quirks and realities. So, before too long, the team has another meeting to pull that group back into alignment.



The second meeting pulls people back into alignment.

And this pattern repeats until the work reaches a conclusion.

For teams working towards a common goal, meetings are a forcing function for creating alignment around a shared perspective. Unlike email or chat or project records, meetings are hard to ignore. When team members are headed in wildly different directions, or someone is off in la-la-land, a meeting can bring them all together much more quickly and effectively than any other method.

Assuming it's a decent meeting, of course. But we'll get to that in the next chapter.

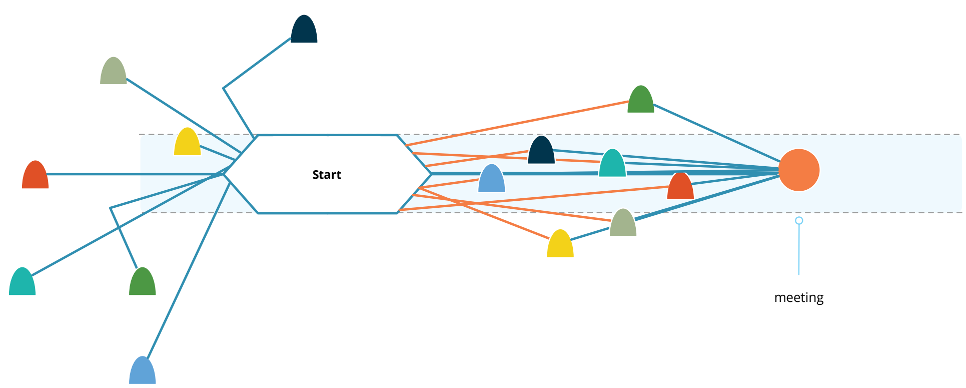
Meeting Strategy: Knowing *When* to Meet

In a later chapter we'll talk about when not to meet—about when to cancel a meeting rather than waste everyone's time. Now let's look at when you *should* meet, based on this understanding of what meetings do for our teams and our work.

When to Meet Rule 1: Meet to Create Momentum

In between meetings, a team's sense of shared perspective gets fuzzier as each person learns new things, then encounters distractions, obstacles, and competing priorities.

When meetings are fairly close together, there isn't much time for people to get too far off the path. Re-creating that shared perspective is pretty easy. It's just a little pull back into alignment.

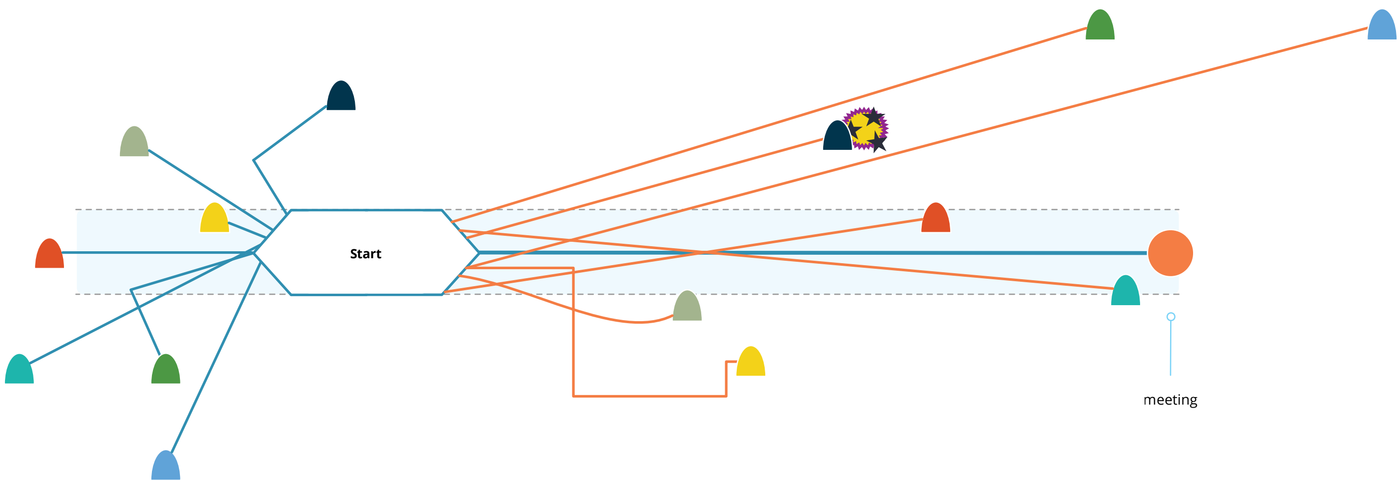


Meetings quickly re-establish shared perspective.

But the longer you wait between meetings, the more frayed that shared perspective gets.

Those who move quickly have a chance to get way out ahead of the group. Those with slower motors get farther and farther behind. Some get lost, and there's always a risk that someone has been completely knocked out by some outside factor.

All of which may go unnoticed by the rest of the group in that big gap between meetings. The people on this team are no longer looking at the work from the same angle.



The group loses cohesion when too much time goes by between meetings.

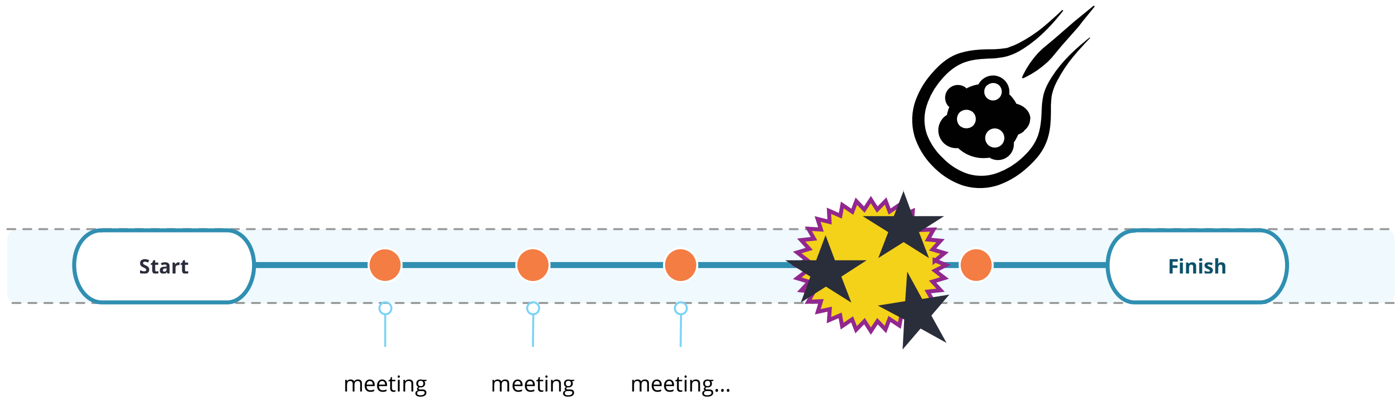
In some ways, this group is farther apart than they were before the project started. The second meeting now needs to be just as long and involved as the first one in order to re-create shared perspective.

So mind the gap!
Schedule meetings frequently enough to maintain momentum.

When to Meet Rule 2: Meet to Change Course

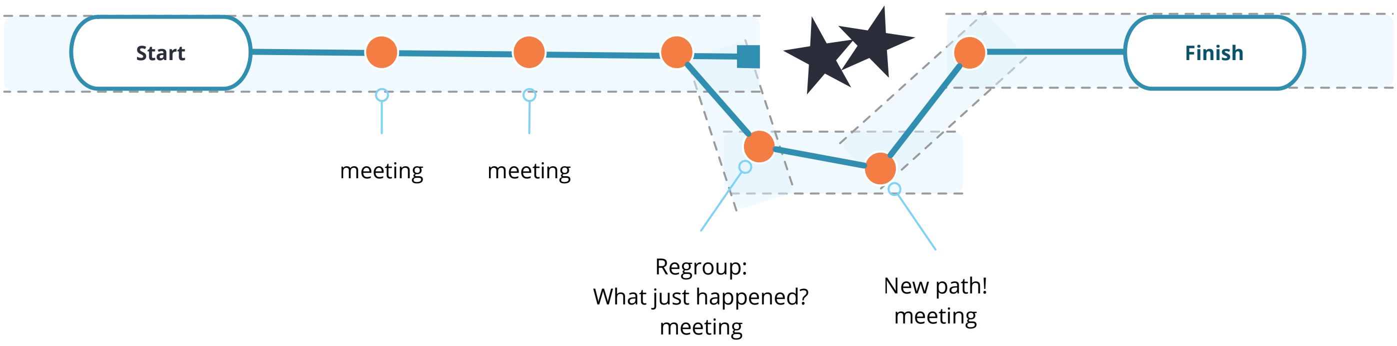
So far we've been focusing mostly on how meetings help us create a shared perspective between people. Sometimes, however, it's not the people who get out of alignment, but the work itself that goes all wonky.

We live in a dynamic universe, and sometimes elements out of our control come in and blow our best laid plans to smithereens.



Time for a new plan.

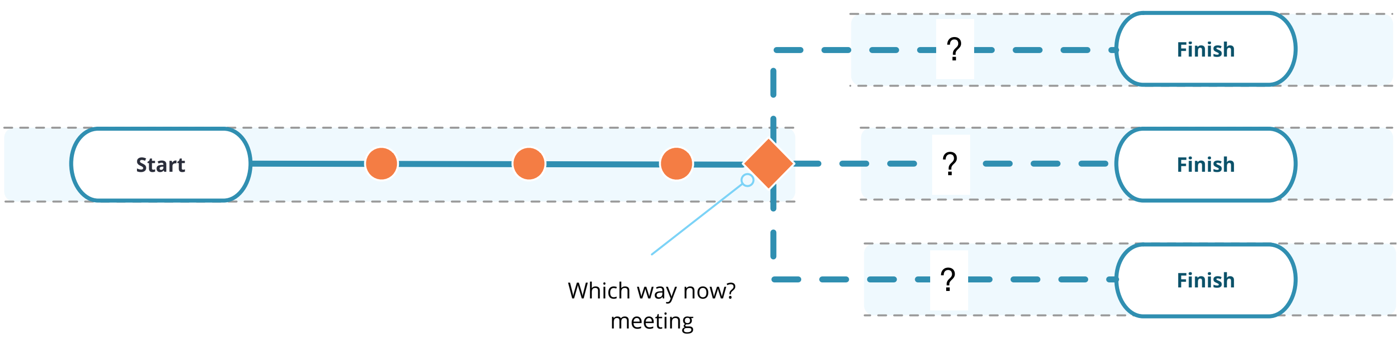
When facing an unexpected dead-end, teams meet to re-orient themselves and chart a new path. What just happened? What do we do now? How do we get back on track? Important questions that the team needs a shared perspective on answering before they can move forward.



Meet to find a new path to success when circumstances change.

Catastrophes aren't the only changes that warrant a meeting.

More often than not, the path that seemed so clear at the outset gets complicated along the way. The team may find itself at a crossroads, unsure which path will lead to the goal most directly. Other times, the team may glimpse an alternate route leading to an entirely new destination—one that they couldn't see before they started along this path.



Meet to decide when the best path forward isn't clear.

Whenever a team is faced with a major change in how to proceed, meet.

What constitutes a "major" change?

Obviously that depends, but I think it's helpful to remember rule 1: Meet to Create Momentum.

Any change of course that the team must have shared perspective around, and where a lack of shared perspective would be a momentum killer, warrants a meeting.

Take-Aways: Why Teams Meet

To sum up:

1. Meetings are a collaboration tool used to quickly create shared perspective.
2. Meetings function by pulling a group of people together, creating alignment around their work, and pushing them out along a coordinated path towards a goal.
3. Meetings must be held frequently enough to maintain this shared perspective and create momentum along the path.
4. Meetings should be held any time the path becomes unclear, and the whole team needs to shift to a new perspective on the work.

Putting the Mental Model to Work

Like all mental models, this one is an oversimplification. Hopefully, though, a useful one. If this has resonated with you and you incorporate this model into how you approach meetings going forward, two things will happen.

First, you'll become radically focused on meeting outcomes. You'll *know* what a meeting is supposed to achieve for a team, and quickly recognize when you're in a meeting that isn't doing the job.

Second, you'll see when you need to meet with your team, and when a meeting is a waste of time. With an understanding of how this pull-push dynamic works to create momentum on a project, you may even find yourself scheduling more meetings than before.

Chapter 3

Meeting Execution: The Underlying Structure of Meetings that Work

Learn the three basic stages required for every effective meeting and see examples of how these stages work in practice.

Behind every effort to improve an organization's meetings, you'll find a larger initiative focused on increasing productivity and improving culture.

Organizations that run effective meetings as a matter of course do so because it improves the productivity and cohesion of teams as a whole, in a way that individual productivity improvements can't match.

To maximize the productivity of a meeting, and of meetings in general, it helps to understand exactly what you expect meetings to produce.

Previously, we asserted that meetings should "quickly create shared perspective."

Let's unpack that one. *What do you get* from teams that have a shared perspective?

Shared perspective produces:

- **Clarity regarding the work**
    - What's done
    - What remains
    - Who's doing what
    - What problems need to be solved
    - Which questions need answers
- **The seeds of trust**
    - When you hear other people's ideas
    - When other people listen to your ideas
    - When you learn about the context of other people's work
    - When other people make commitments
    - When other people report back on commitments met
    - When the agreements you make and commitments you keep are appreciated by others

When a meeting fails to create this shared perspective, it's usually because the meeting wasn't structured to do so.

Which is sad, really, because once you understand the basic framework needed for any productive meeting, there's just no reason to ever spend time in an unproductive meeting again.

> "The structure, aliveness, deadness, whisper or shout of a meeting teaches and persuades us more about the culture of our workplace than all the speeches about core values and the new culture we are striving for …
>
> What we call meetings are critical cultural passages that create an opportunity for employee engagement or disengagement."
>
> – *Peter Block, in the foreword to Terms of Engagement: New Ways of Leading and Changing Organizations*

So let's dive into this question of structure.

We'll look at meeting structure from several angles. Don't worry! You don't need to remember all the details.

We'll explore all these perspectives on meeting structure for the same reason we share ideas in a meeting; because when you look at it all together, it gets easier to see what these frameworks have in common and what really matters.

We Meet to Find the Elephant in the Dark

Meetings have one function. Specifically:

We meet to quickly create shared perspective in a group.

It can be hard to care about "shared perspective."

Each person might think he or she knows everything needed to get on with the job, and that this time spent with the group is a waste.

The reality is that we are all working with blindfolds on. There is too much information flowing through the modern workplace for any one of us to fully grasp the "truth" of the matter.

A PARABLE

This ancient parable illustrates our challenge.

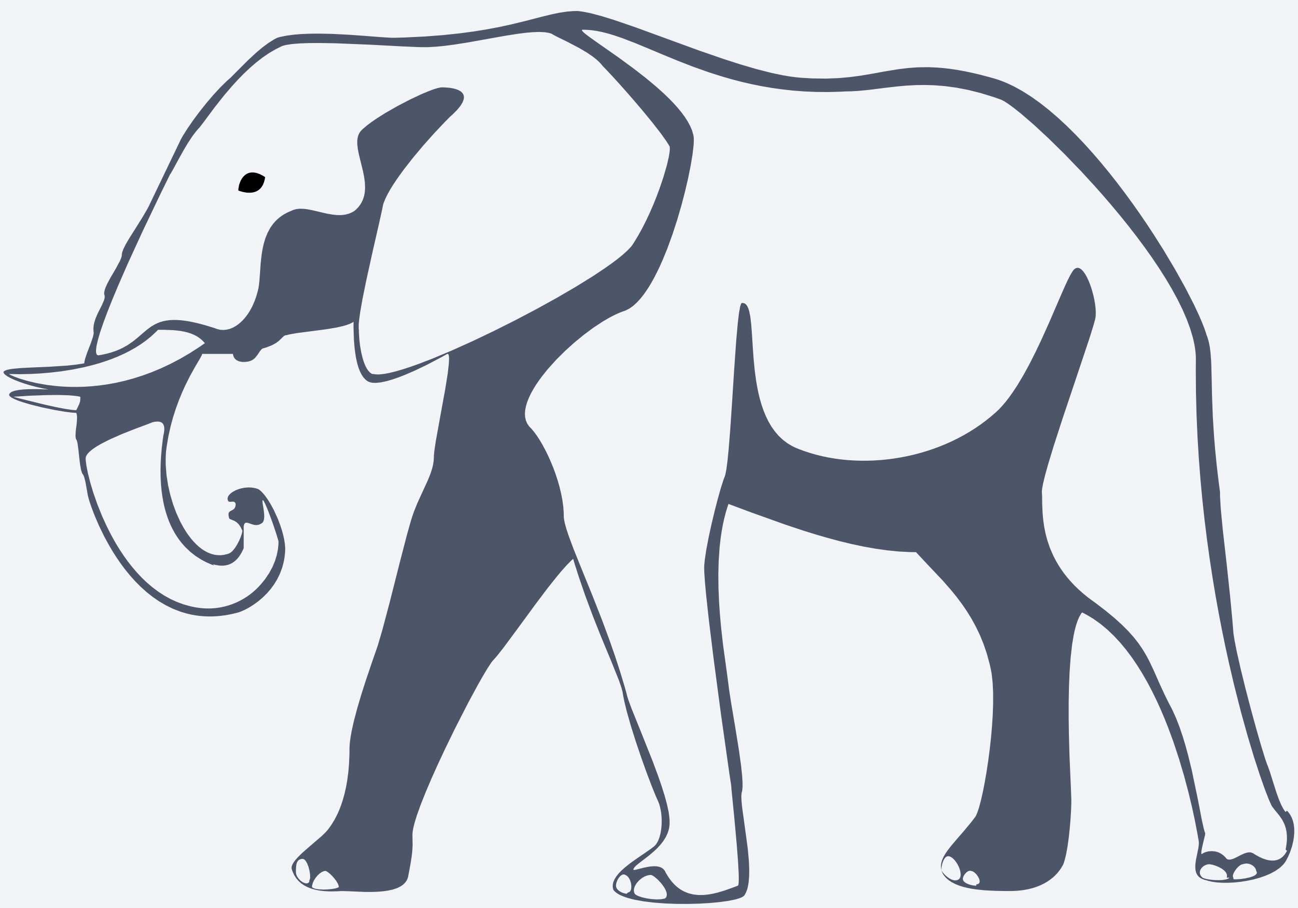
6 people who have never seen nor heard of an elephant enter a dark room. They each touch the elephant hidden inside the dark room to learn about it. Each person feels only one part of the elephant; just the tail, or just the trunk, for example.

Each one forms a true, accurate, *and very limited* idea of what an elephant is. The person who felt the trunk believes an elephant is like a hose. The person who felt the side thinks the elephant is a wall.

When they compare their ideas, they find they don't agree at all.

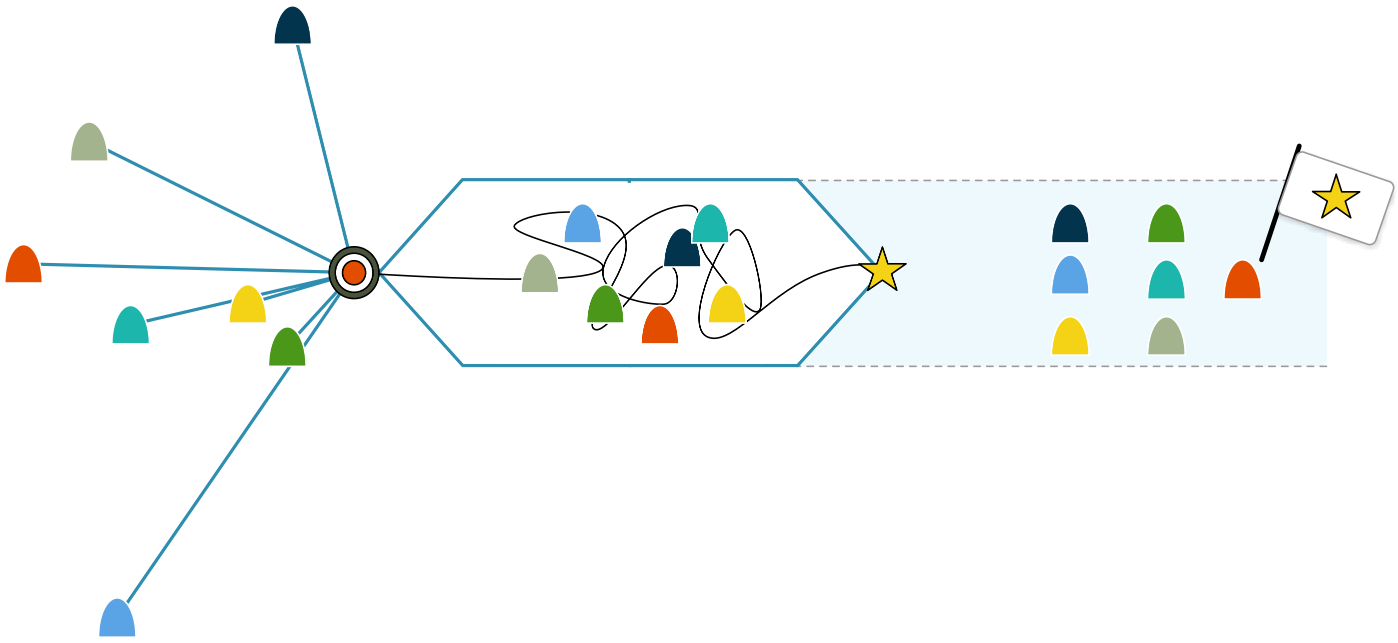
A properly structured meeting helps teams share, compare, and merge what they know independently into a more complete picture.

Together, we can all better appreciate the whole elephant.



An elephant (Icons from The Noun Project)

Meetings achieve this function by pulling individuals together into a space where they can work to align their disparate viewpoints. Once they've assembled a shared perspective on the topic at hand, a successful meeting ensures the group heads out in a unified direction towards that shared goal.



Everyone sets forth together, their goal clearly before them.

The Essentials of Meeting Structure

Meeting structure is a fancy way of saying the plan for running the meeting.

Structure covers all the *how*:

- How people will introduce themselves
- How you'll organize the topics
- How you'll lead the discussion
- How you'll review presentations
- How the group will make decisions
- How you'll capture results

Using the right meeting structure prevents dysfunction and ensures results.

Our [agenda template gallery] includes many pre-designed structures for running specific meetings. These templates spell out how to prepare for the meeting, any exercises or activities to run during the meeting, and what to write down to make sure the team walks out with a tangible result.

Ultimately, you'll want to establish that same level of detail for meetings you run often.

That said, **every functional business meeting shares a common, underlying structure**.

You can think of this underlying structure as a basic outline for a functional meeting. When you understand this core structure, two things become possible.

1. You will plan better meetings.
2. You will make un-planned meetings better.

MEETINGS 101: CREATING A MENTAL MODEL

If there were ever to be college major in effective meetings, coursework would start here.

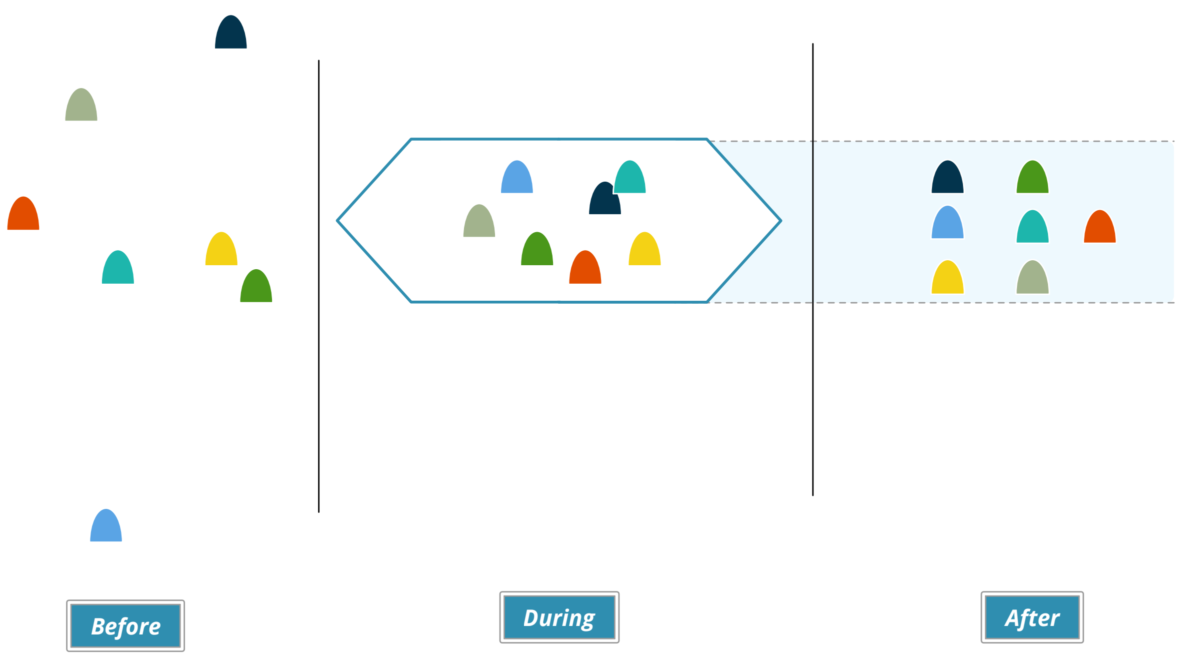
Why start with structure? Because recent research has debunked the idea that "natural talent" is all you need to excel.

Instead, expertise and mastery come [from deliberate practice] and [having a mental model] readily available for tackling the work in front of you.

This chapter will help you build a basic mental model you can use to structure any meeting.

To understand this basic meeting structure, let's start way up at the 10k foot level.

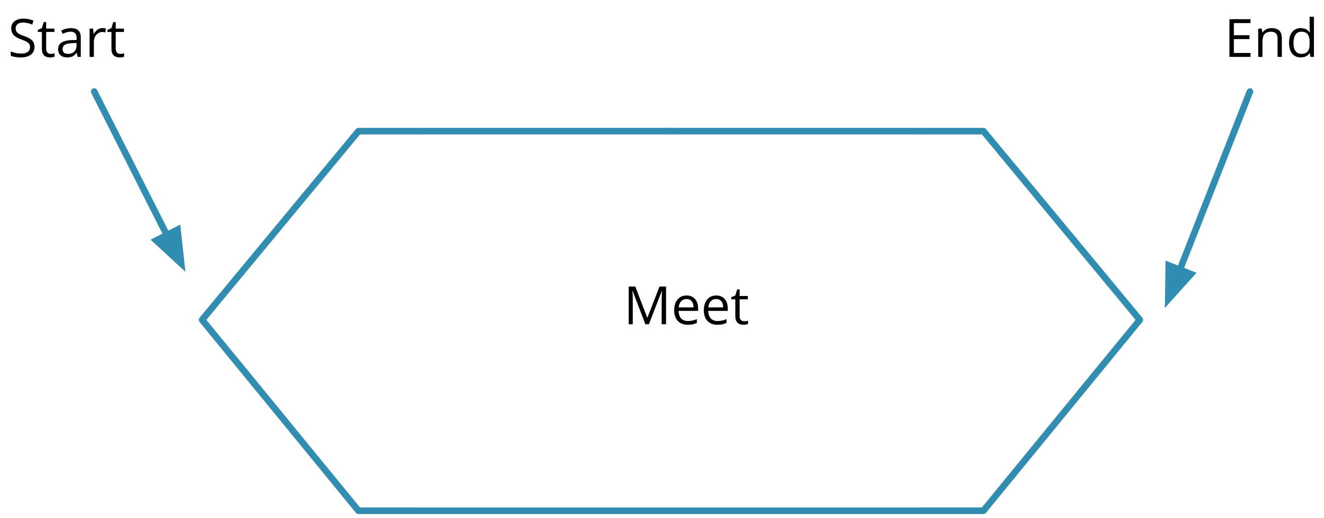
From here, we see the basic structure of a meeting and how that meeting fits into the work over time. For each meeting, there is a before, a during, and an after.



Before: everyone doing their own thing. After: aligned and moving forward together.

Zooming in, we can see the structure of the meeting itself.

Every meeting has a beginning, middle, and an end.

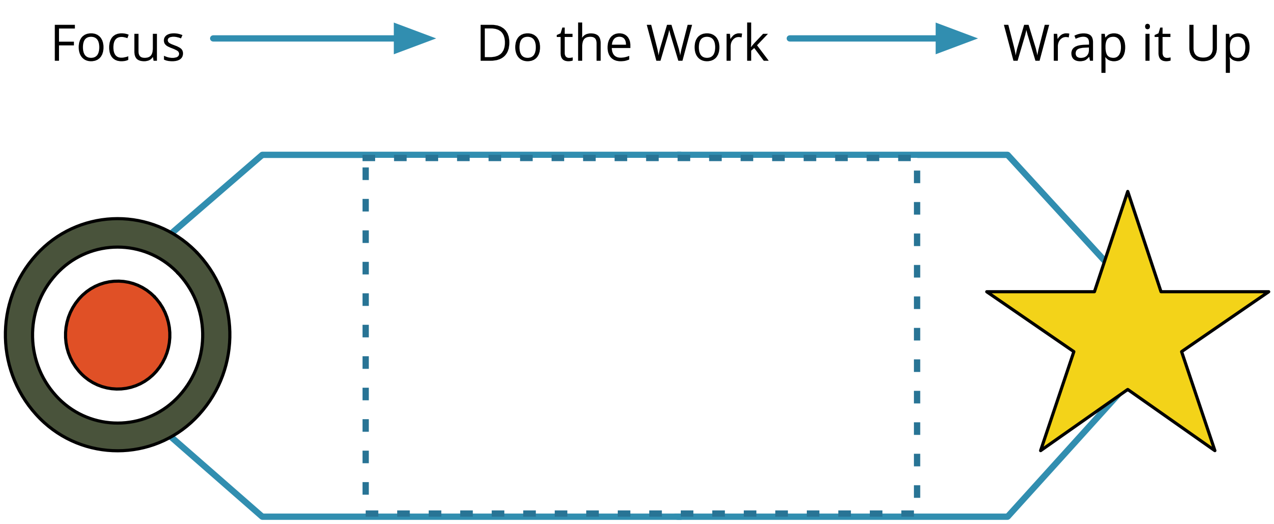


Meetings start, then later they end. Pretty obvious.

What distinguishes a functional meeting from a waste of time?

In a meeting that works, the team focuses 20%–30% on the beginning and end of the meeting.

Rather than just blips in time, the start and end of meeting are dedicated phases in the process. A meeting that is all middle doesn't work as well.



20%—30% of the total meeting time spent opening and wrapping up

The 3 Non-Negotiable Phases of a Meeting That Works

At the most basic, rock-bottom level, a meeting needs these 3 distinct phases.

1. **Focus and Become Present**
2. **Do the Work**
3. **Wrap It Up**

At this *minimal functional level*, we're talking about a meeting that isn't a total waste of time. Teams that go through these three stages *will* achieve a shared result.

They may not have any fun doing it, but at least they'll get something out of the time spent.

Here's what that looks like:

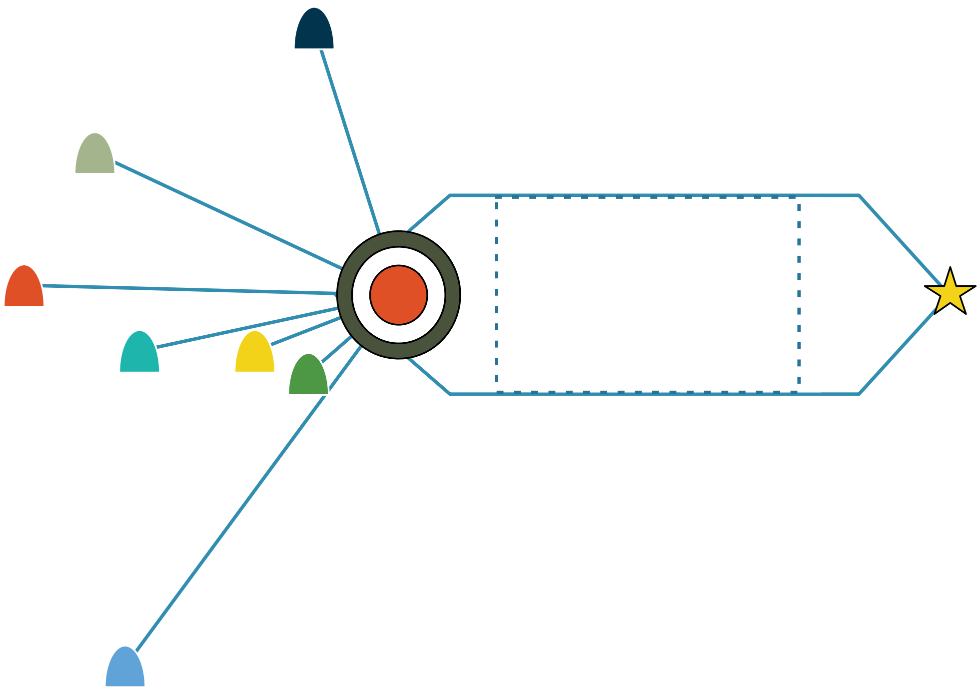
Phase 1: Focus and Become Present

The meeting begins by getting everyone into the conversation at the same time, transitioning them successfully from wherever they were before into the task at hand.

It starts with focus.

A functional meeting must secure the attention of the team before the work can begin. This is why many meetings begin with some form of welcome, roll call, or other activity designed for everyone in the meeting to literally declare themselves "here."

A focused opening ushers the group into the rest of the meeting, assembling the team together and guiding them into the main show.



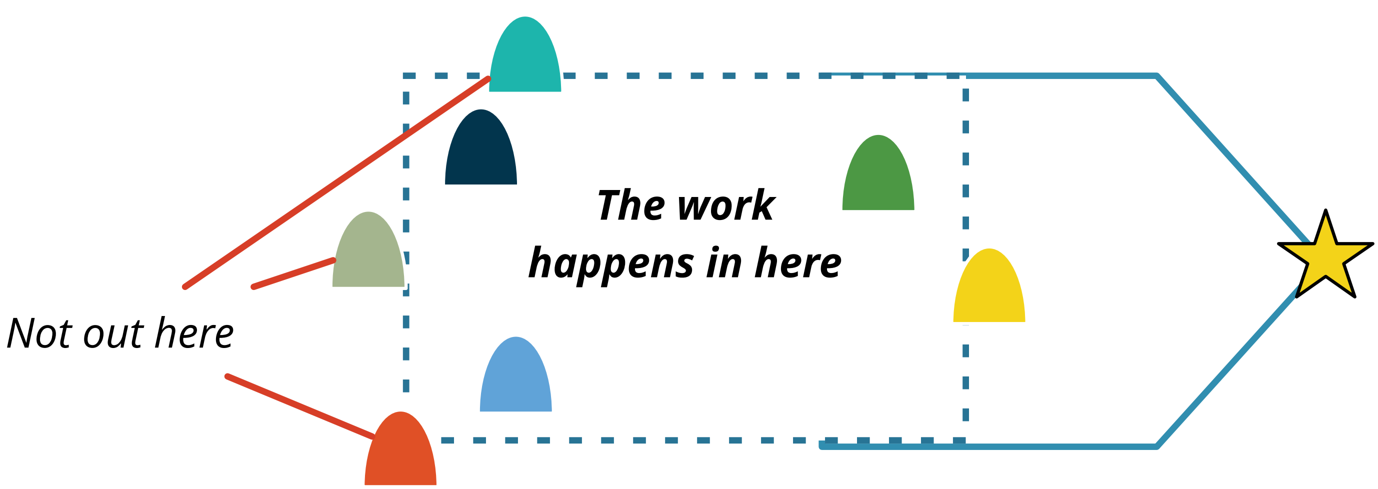
A focused opening pulls the team's attention into the meeting.

People who are multi-tasking, pre-occupied, or otherwise "not really there" cannot participate effectively in creating or understanding the work of the group.

Unfortunately as a meeting leader, you can't guarantee that the people in your meeting will really "be present" for the discussion. If you fail to clearly open the meeting, however, *or to even ask for this presence up front*, you greatly increase the likelihood that the meeting will fail.

If you don't do the work to transition people into the meeting and engage them in the topic, don't assume they'll do it on their own.

They won't.



Without a clear opening, some people never bring their attention into the meeting.

"TIME OUT!" I HEAR YOU CRY.

"Work doesn't happen in meetings! Meetings are where we go to avoid work. Meetings are what keeps us from getting our real work done. I do all my work outside of meetings!"

For you, I have two replies:

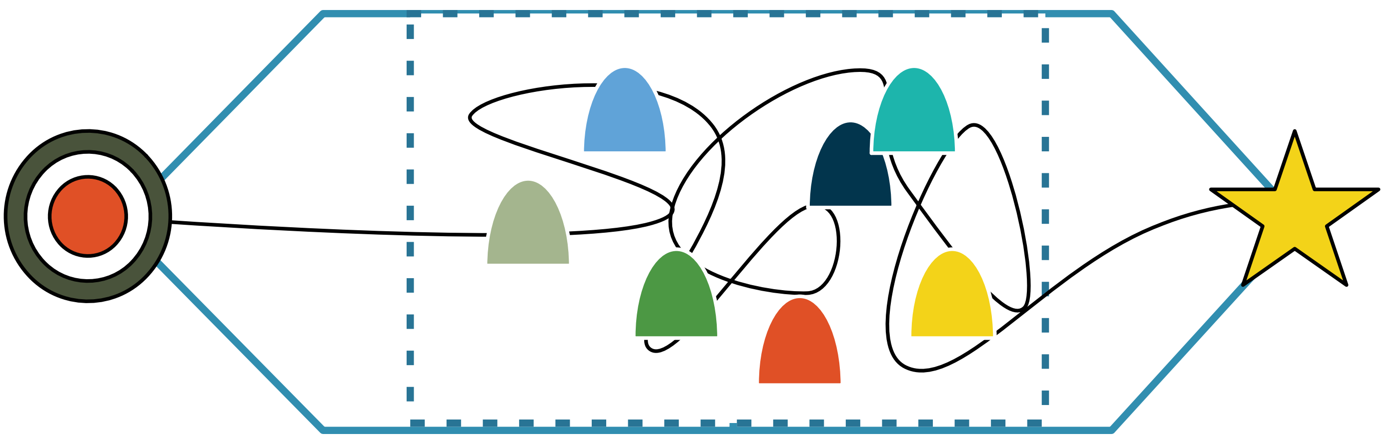
1. **Re-think what you consider work.**
   Of course tangible production matters—but only if you're producing something useful, valuable and/or desired. You need to know what to produce, how to do it, by when, with whom, and for whom, and these things often get decided in meetings. If no one does the *deciding and coordinating work*, your "real" work goes nowhere.

2. **If there is literally no work to be done in a meeting, cancel it.**
   This is not a guide on how to overthink complicated ways to waste time. It's about how to structure meetings to make sure they do the work they're meant to do.

Ok, enough of that. Let's look at Phase 2.

Phase 2: Do the work

Once everyone becomes present, they can work together to get aligned. When we draw this part of the meeting, it can look a little messy.

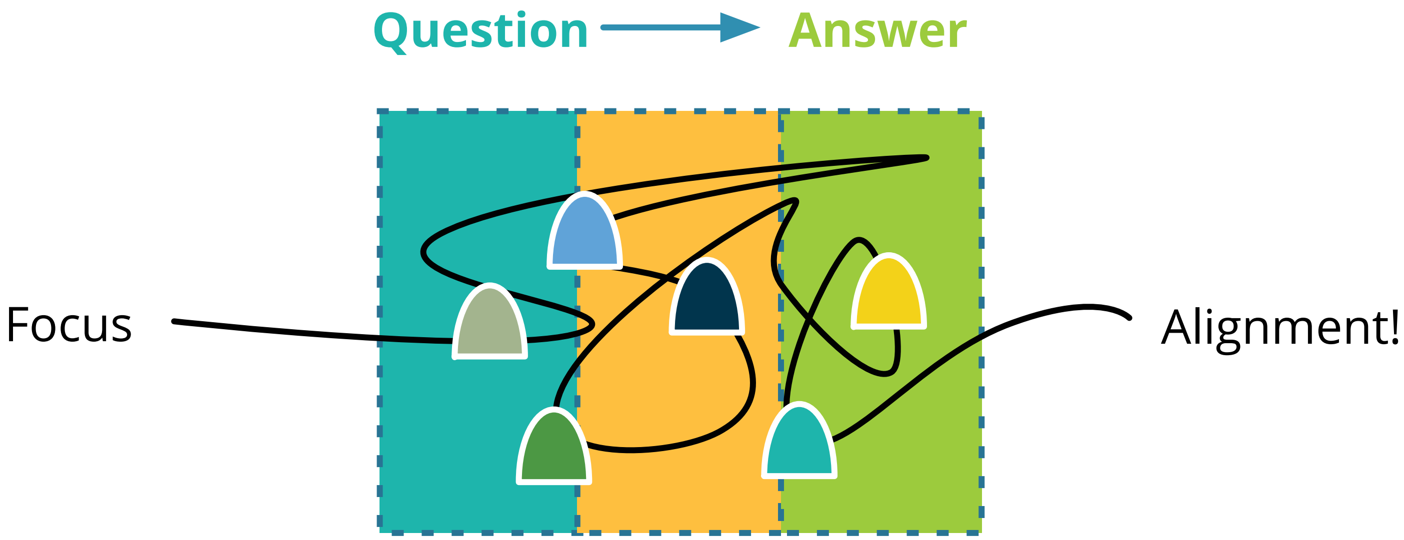


Lots of back and forth during a meeting

Functional meetings result in some tidy outcome: a decision, a plan, a set of action items, a date for the next meeting, and a feeling of time well spent.

The creation of that outcome requires everyone in the group to move from whatever they understood the situation to be beforehand to this new shared understanding. They need to assemble the elephant. There are questions to answer, conflicts to unravel, egos to navigate, and a popcorn smattering of "aha!" moments to enjoy.

People arrive at conclusions at different rates, and as new ideas emerge, the group can get pulled back into the soup. While you can work to tidy up this part of the process, the creation of alignment will always be a bit messy.



Traversing the Problem Space

People start to see the full picture at different rates.

Every meeting I've ever seen has a "do the work" phase.

Groups always manage to *talk* about something in a meeting; but they don't necessarily hear what's said (because they weren't really present) or walk away with any noticeable result.

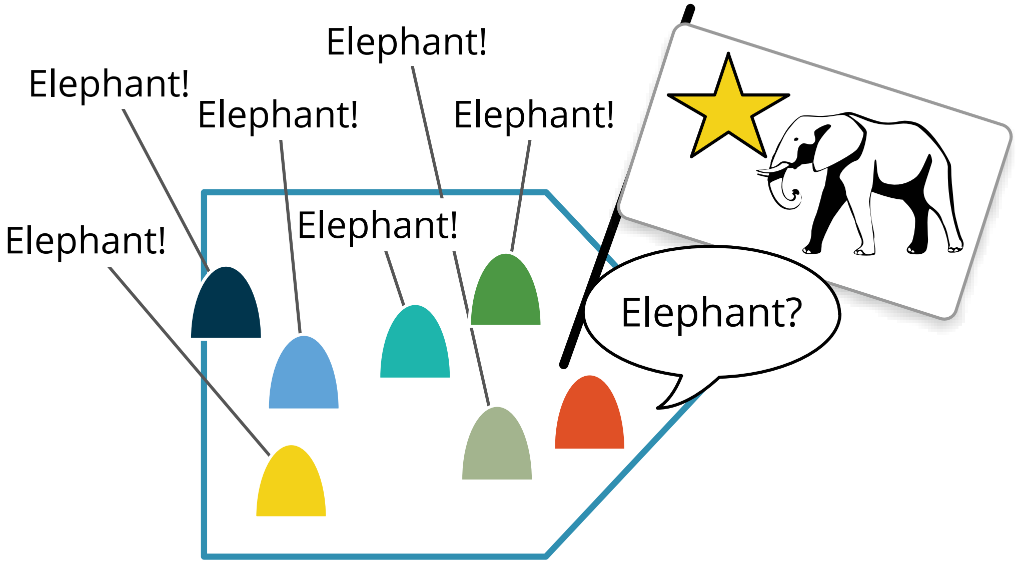
Meetings fail when they *only* focus on doing the work.

Phase 3: Wrap it Up

That's why functional meetings always end with a clear review of what the group just created.

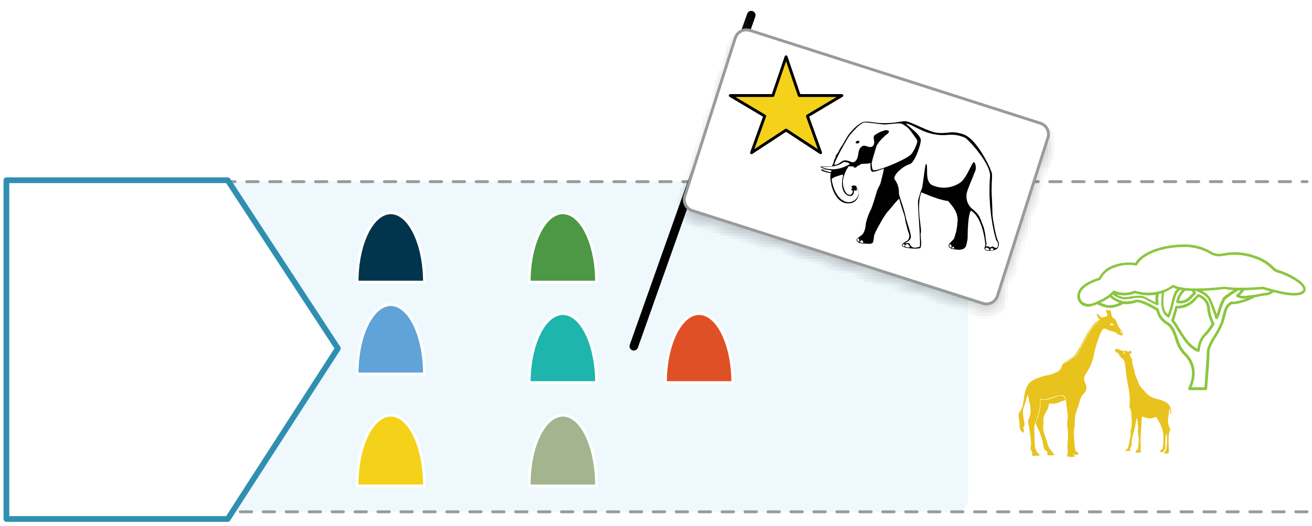
Remember, the *whole point* of a meeting is to ensure the group walks out with a shared perspective.

You can only be sure this worked if you ask.



Don't assume you have an agreement. Ask and be sure.

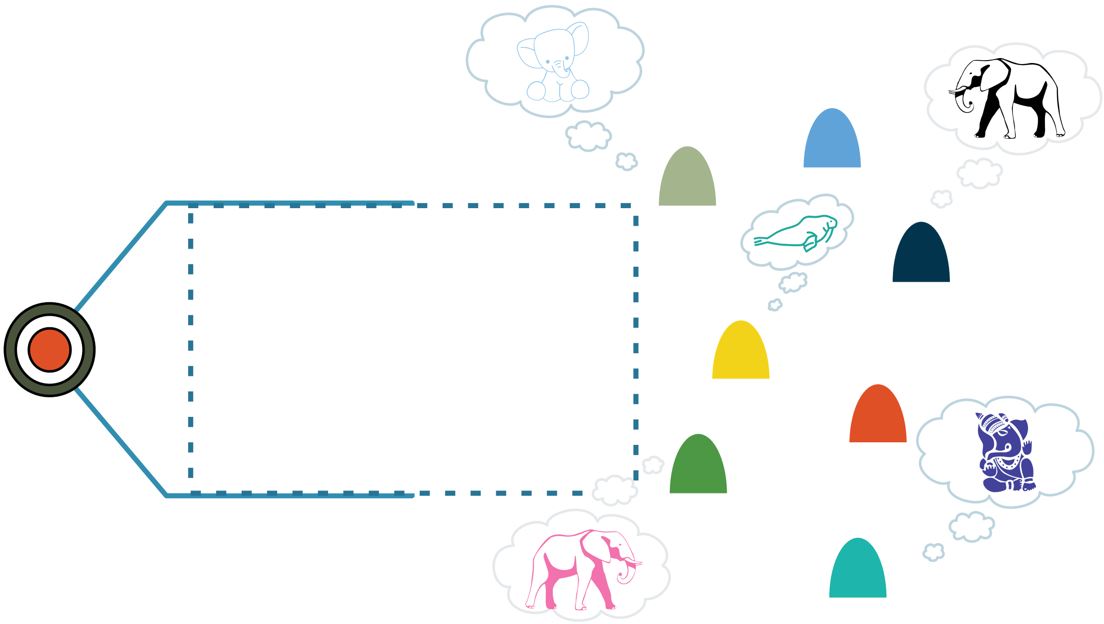
Before the group leaves, decisions need to be restated, each person must confirm that they understand what just happened, and more importantly, that they know *what will happen next* as a result.



It's an elephant! Let's take him back to the savannah.

Many groups who *think* they achieved their meeting goal skip this step, especially when they're rushed for time.

Groups that skip this step assume the decision they believe they heard was clear to everyone else. Close perhaps, but unlikely.

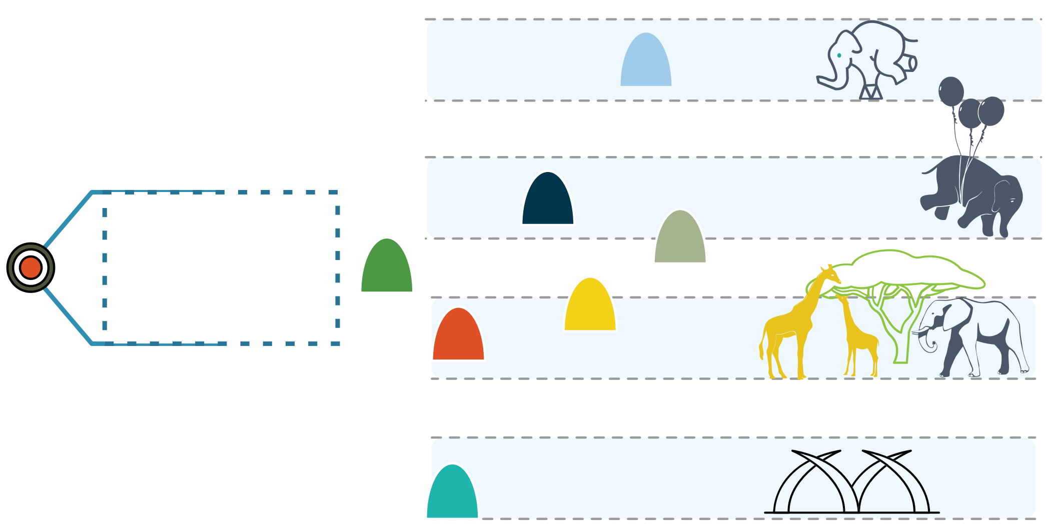


Hmm. It looks like they don't have the same idea about that elephant after all.

And when a group fails to check commitments at the end of a meeting, each person leaves with whatever they felt was most important and heads off in the direction that seems best to them.

Individuals take responsibility for whatever actions they think they own and remember only the details that directly and immediately impact them.

Even if they share the same picture, they may not share the same beliefs about what they're supposed to do about it.



Because they didn't explicitly agree on next steps in the meeting, each person may have different ideas about what to do with an elephant.

People often assume that "someone else" will take on any tasks identified in the meeting, then quickly forget most of the discussion.

This can leave your elephant just sitting there in the dark, mucking up the place and waiting to be set free. Not ideal.

From Functional to Successful

So *at a minimum*, every meeting must start by getting the group really "present" for the discussion before they can work together. Then, once the work is done, the meeting must end by wrapping up to make it clear exactly what's supposed to happen next.

That's really a minimum, though. More successful meetings approach these 3 phases with vigor!

Once again, this time with feeling!

Successful meetings:

1. **Engage!**
   Go beyond "present" and get the group involved!
   (See some tips for leading introductions in business meetings.)

2. **Co-Create**
   Don't just do the work and punch the clock—work together to co-create something new! Combine unique ideas and insights to create a shared perspective that's more complete, more ambitious, and more everything than what any one person could do on their own.

3. **Commit**
   Don't just recite a list of outcomes! Commit to acting on the agreements made in the meeting. Every action has an owner, and every owner commits to seeing that action through.

Meetings that end with a new shared perspective *and* strong commitments to act upon this outcome are not a waste of time.

Symptoms of a Malformed Meeting

What does it look like when a meeting lacks this basic functional structure?

Poor structure is behind many of the common problems you'll see in a meeting.

Signs of Failure to Focus at the Beginning

Problems you'll see when there is no opening or "ask" for engagement at the beginning of the meeting:

- People using cell phones or checking email during the meeting
- People who don't speak up or participate; who aren't really "there"
- Confusion and false starts, as people try to figure out why they're there
- Sloppy and/or uncomfortable moments when it's not clear where the chit-chat ends and business begins

Signs of Failure to Structure the Work

Problems you see when the process for doing the work isn't clear:

- Rambling discussion; people talk and talk
- Inconclusive discussion
- Running over time
- New topics pop up
- Teams revert to safe answers or give up
- The creation of laundry lists without owners or priorities

Signs of Failure to Wrap Up

Problems you see when the meeting isn't wrapped up at the end:

- No written communication afterwards
- Only the people in the meeting know what happened
- Nothing much happens afterwards or changes as a result
- Less than 60% of the agreements made in the meeting stick
- You have the same conversation with the same group again later

Any of this look familiar?

Next Level Structures and The Geometry of Effective Meetings

Now that we've covered the basics, let's build on and strengthen our mental model.

Many experts who help groups run useful meetings have published conceptual frameworks that expand on the 3 basic phases of a meeting.

One of the great blessings of our human wiring is the natural ability to spot patterns, especially when we're primed for them. If you've ever considered buying a car, you may have suddenly noticed that car everywhere you drive. When you're expecting a child, you start seeing pregnant women and strollers all over the place.

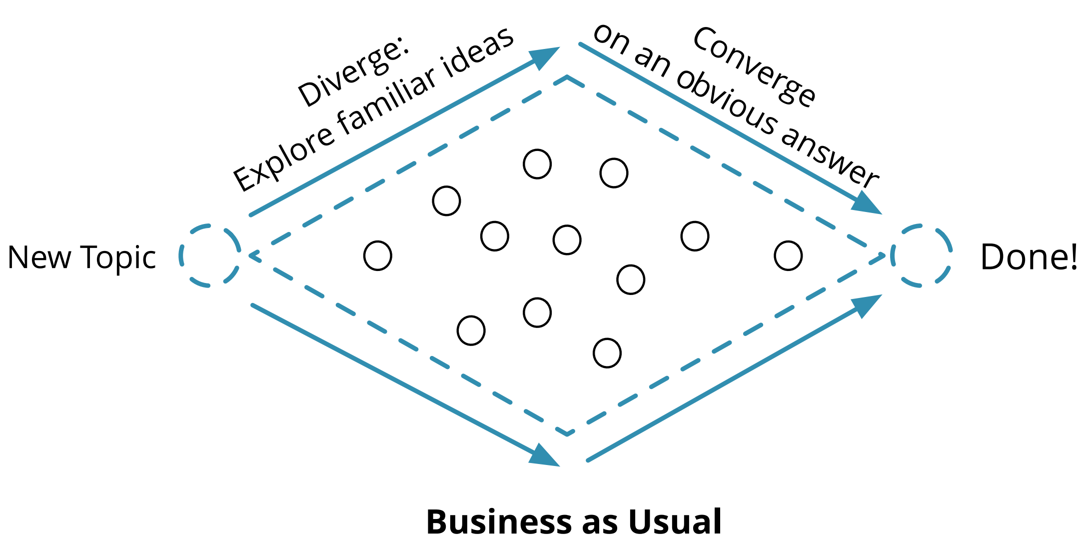
With that in mind, here are four more ways of thinking about meeting structure that reinforce and build on the 3 basic phases outlined above, and an example of how each structural shape maps to a common meeting agenda.

The Diamond of Participatory Decision Making, a.k.a Diverge, Emerge, Converge

The landmark *Facilitator's Guide to Participatory Decision Making* has an unfortunately complicated title for a book that's actually full of simple diagrams and useful, clear models.

The book's central conceptual model is The Diamond of Participatory Decision Making. The Diamond illustrates group dynamics, exploring the discussion phases a group will go through as they work to find answers in a meeting.

The Diamond comes in two flavors: simple and complex. The simple version shows what happens *when the topic covers known territory and the answers are obvious*. It looks like this.



Focus, Diverge, Converge, Wrap Up.

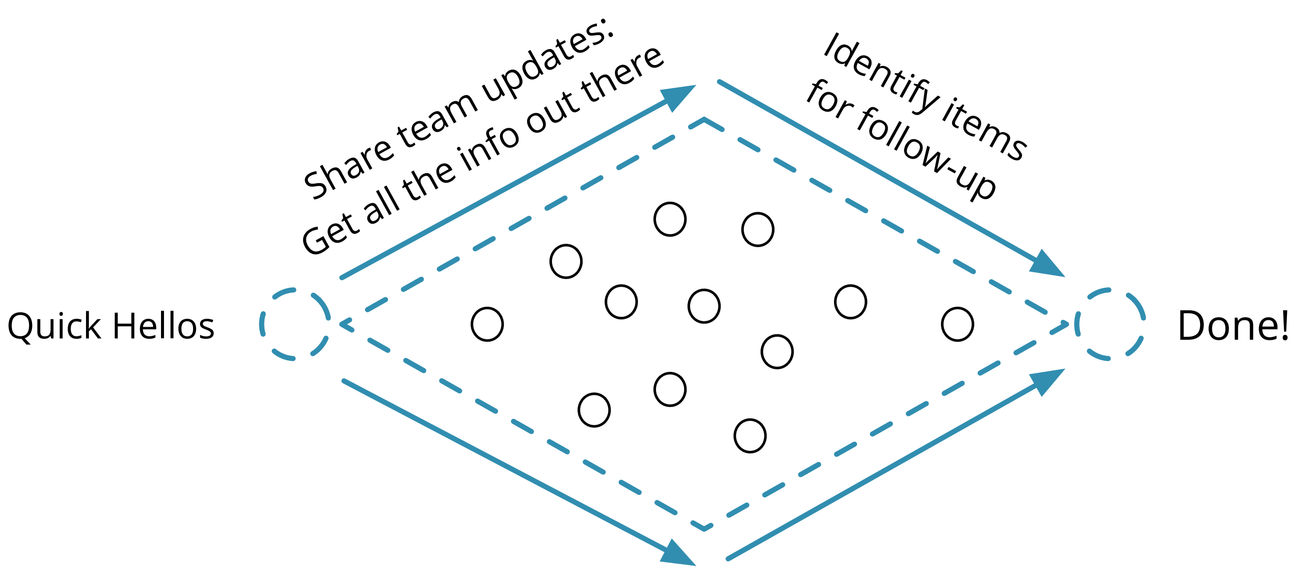
Each small dot in the triangle represents an idea or opinion. The group starts at a unified point, then briefly explores familiar opinions before narrowing in on a decision.

As you can see, the group starts and ends at a focused point. This matches the 3 basic phases discussed above.

The Diamond was designed for facilitators working in large group sessions, and shows what could happen for *each* major topic in a complex meeting.

That said, for short meetings, standing meetings, and other discussions that have simple outcomes, this simple shape covers the whole meeting.

For example, here's how a typical 15-minute leadership huddle or agile standup maps to this shape.



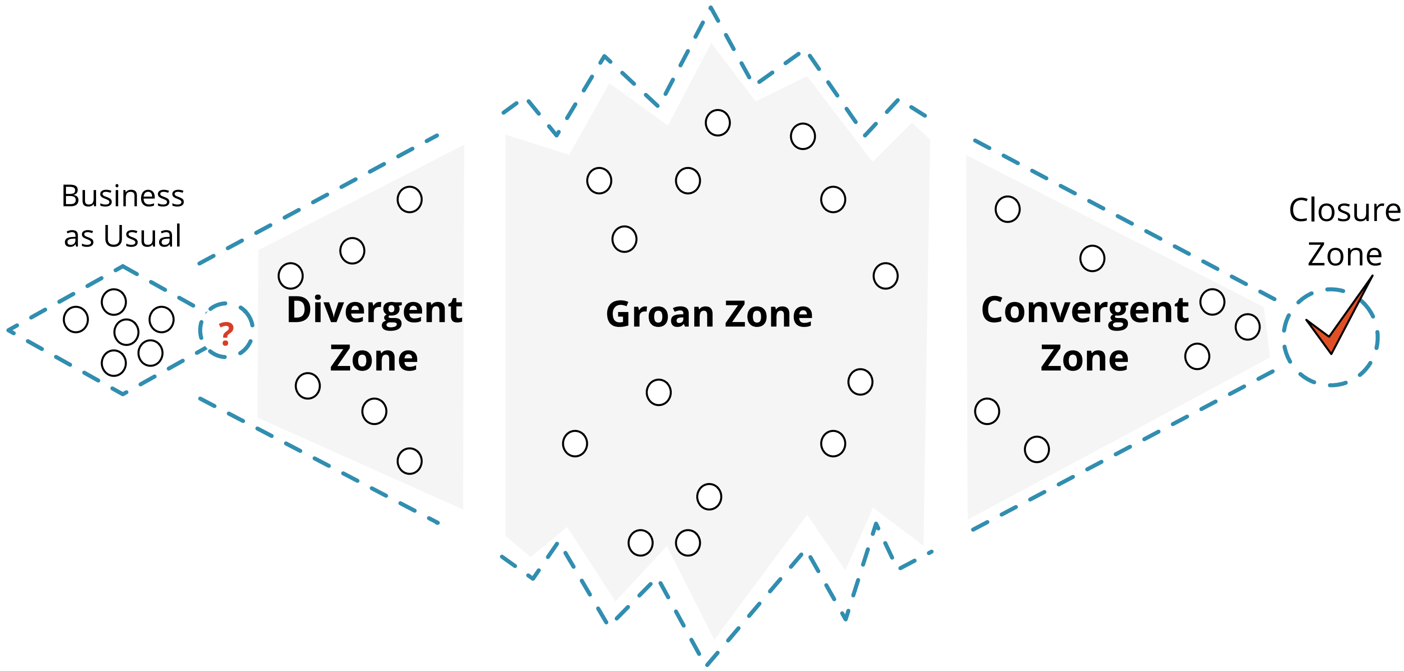
A Huddle or Stand-Up Meeting

Huddles are designed to quickly confirm status and uncover problems. That's it.

Thank goodness not every topic has an obvious conclusion, because how boring would that be?

The second Diamond expands to cover what happens (or—what should happen) when groups work on more complicated subjects.

Here's the Diamond of Participatory Decision Making in all its glory.



Sam Kaner et al.'s Diamond of Participatory Decision Making

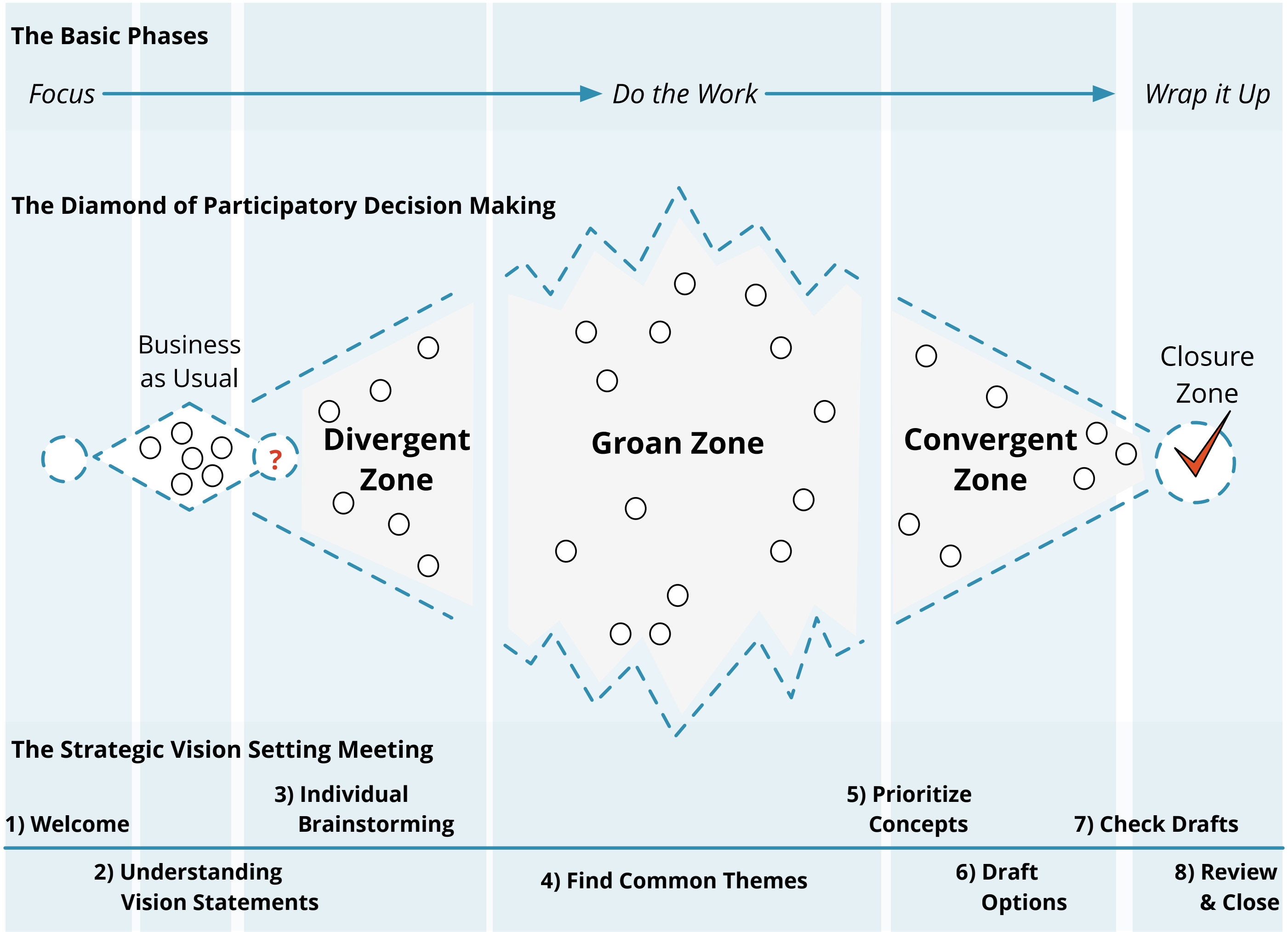
As the group realizes that the usual answers won't do, they begin throwing out new ideas. This is known as divergent thinking; the kind of discussion groups have when they're making big lists, brainstorming, and exploring "what if?"

After all that mess is out there, it has to get synthesized. Groups begin the hard work of co-creation. This part can be awkward and painful, which is why the authors call this "the Groan Zone". If they can stick with it, the group will find new ideas that can't be attributed to any one individual *emerge* out of the soup.

Finally, the group narrows down the field of possibilities and *converges* on an answer. This answer becomes the new shared perspective.

With all those ideas flying around, you can see why it's so important to end the discussion by wrapping up and confirming exactly what (of all the many possible approaches) the team decided to do. The circles for the start and close may be smaller in this diagram, but they're no less important.

As an example, here's how a strategic vision setting meeting maps to the Diamond of Participatory Decision Making.

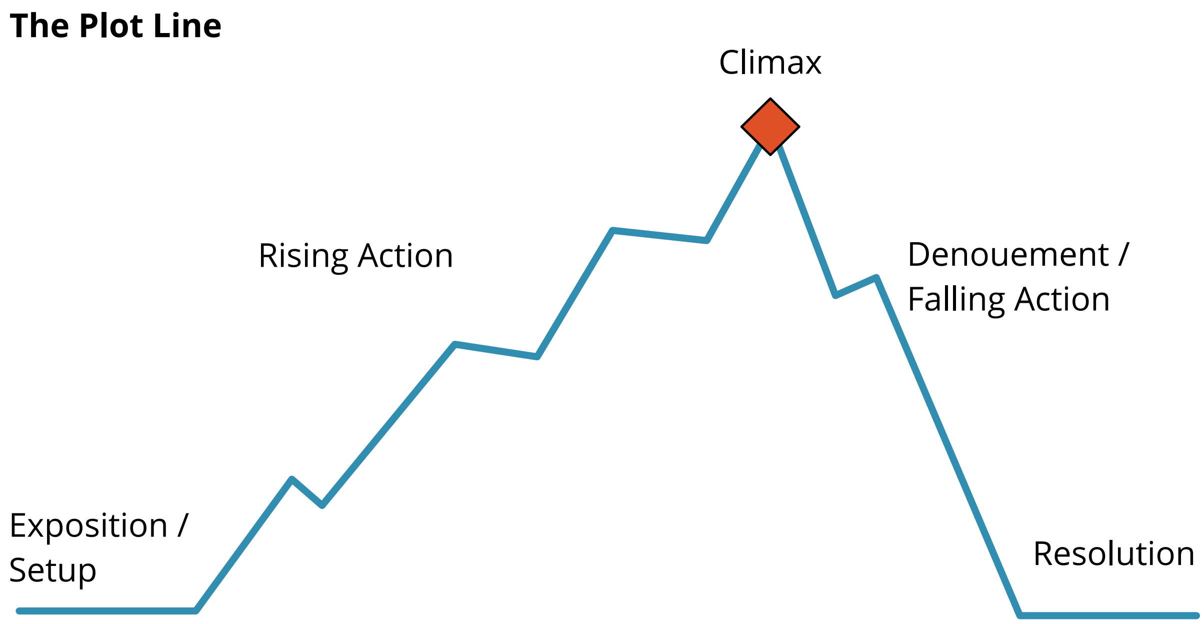


The basic phases at the top, the Diamond in the middle, and the agenda topics for the Strategic Vision meeting at the bottom

The Plot Line

Our second shape comes from the world of drama rather than the world of business meeting facilitation.

Take a look at a standard plot line developed by Gustav Freytag (aka Freytag's Pyramid).

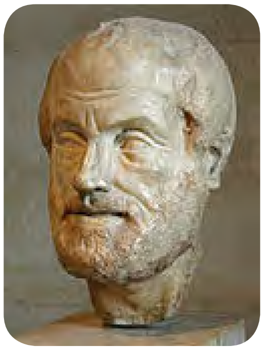


The 5 Parts to a Plot Line: Exposition/Setup—Rising Action—Climax—Falling Action—Resolution

Freytag developed his 5-part pyramid after studying patterns in Shakespeare and ancient Greek stories, and you can find this structure still clearly grounding much of what's created today.

Authors continue to use this structure because it works. People know how to follow this kind of story. A structure everyone can automatically follow and understand is a very desirable quality for meetings too.

The Evolution of Dramatic Structure



Total—but interesting!—side note:
Freytag's work built on and extended the dramatic structure that Aristotle introduced in *The Poetics*.

Aristotle believed in the purity of a simpler 3-part structure, consisting of a "beginning, middle, and end". Aelius Donatus later formalized these stages as:

1. the *protasis* (introduction),
2. *epitasis* (main action)
3. and *catastrophe* (final resolution).

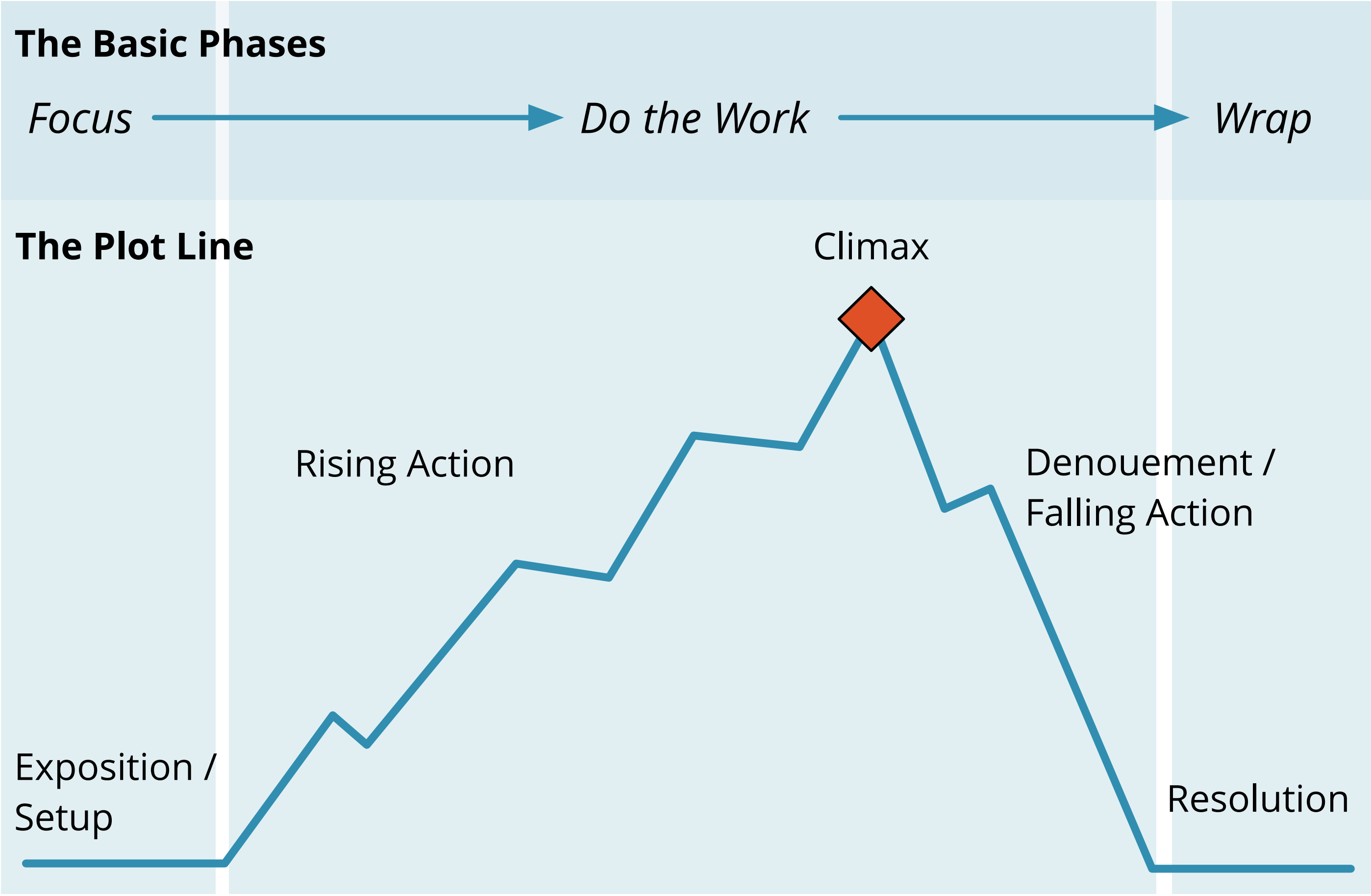
Sound familiar?

Stories start by setting the scene. The audience gets to know the characters involved, and the context for what's to follow. Professional facilitators sometimes refer to the meeting opening as "the setup," where they'll introduce the agenda, set the ground rules, and give everyone a chance to introduce themselves and check in personally. Exposition, or the setup, makes it possible to understand the action that follows.

After that, we get the rising action. This is sometimes drawn with a jaggy line to represent setbacks along the way. In meetings, these are the twists and confusions and random interjections that make the conversation more complex.

The rising action leads to a climax—that point in the story where the action comes to a head. Not every meeting will experience anything we would qualify as a true climax, of course. (These are business meetings after all. Let's not get too carried away.)

For those that do, though, we can see this happen in those moments where the confusion, disagreement, and uncertainty start to turn into clarity. For example, in the Diamond above, the climax comes as the group emerges from the "groan zone." *I can't believe I just wrote that.*



The basic meeting phases and how they line up with the 5 parts of a story

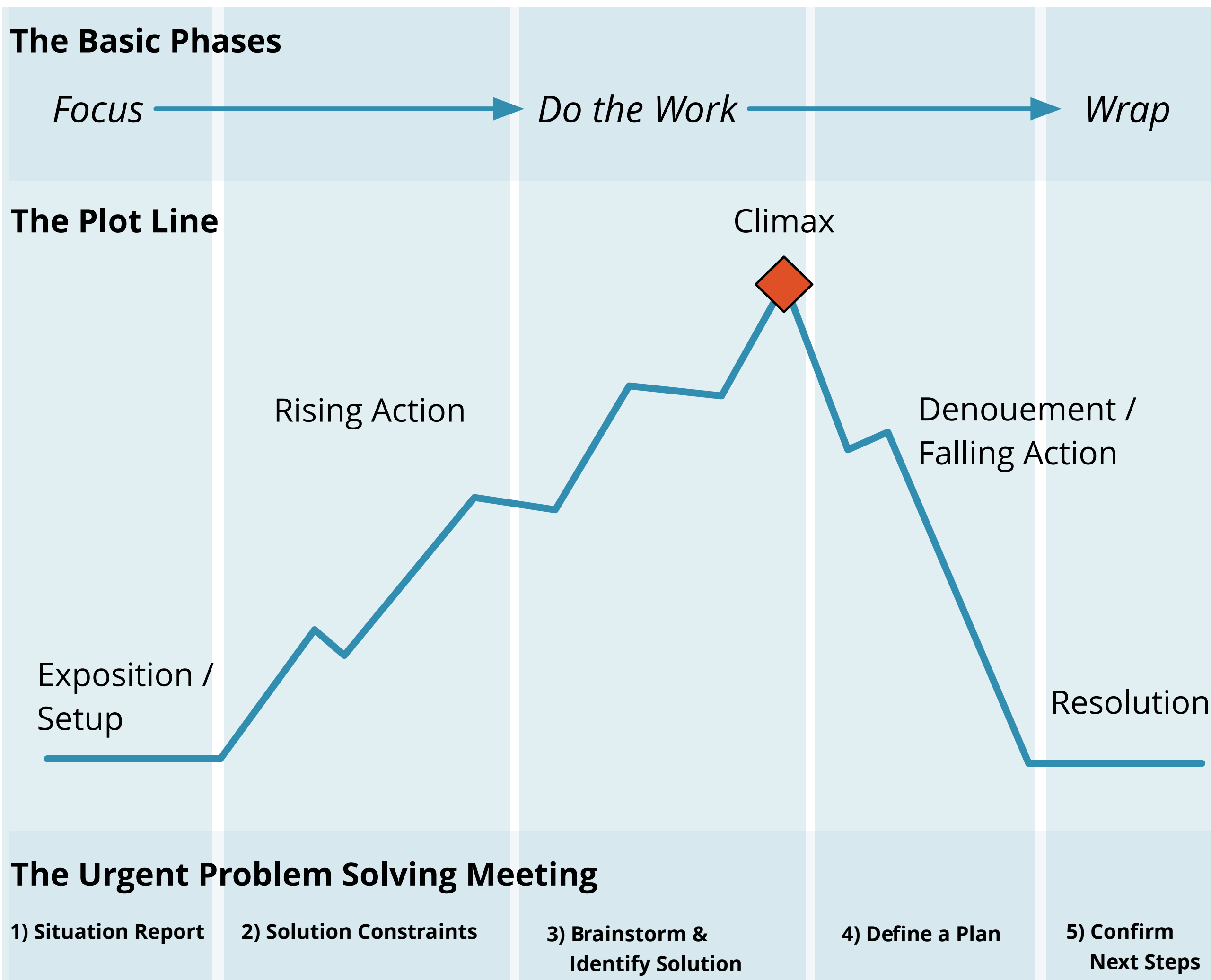
During the falling action that comes after the climax, the characters have the clarity they need to start moving forward. Any remaining conflict unravels and decisions get finalized. In a meeting, this is the work getting done.

Resolution and Denouement. In the story, this is the part where our characters clean up after the chaos, and begin getting on with what's next—eternal remorse, a happy ending, or simply enjoying the lull between sequels.

It's only at the close of a story that we can process what just happened in the climax, and accept that our heroes have prevailed to fight another day. In meetings, the wrap-up serves as the the resolution. Closing a meeting well gives everyone involved a chance to process and appreciate the agreements reached.

The story line gives us a handy timing tip. There are 5 parts to the plot line: 1 for the setup, 3 for the main action, and 1 to wrap up. Writers are often advised to divide the time spent across these 3 major sections by 15%–70%–15%. Dividing meetings into 15% for the opening, 70% to do the work, and 15% to wrap up works pretty well too.

For a concrete example of how a meeting might fit along a the traditional plot line, here's the Urgent Problem Solving Meeting mapped out.



Basic phases at the top, the plot line in the middle, and the agenda items in the Urgent Problem Solving Meeting at the bottom

The Meeting Canoe™

One of my personal favorite frameworks comes from Dick and Emily Axelrod, organizational designers and authors of *Let's Stop Meeting Like This*. They teach people how to structure meetings using The Meeting Canoe™.

First, let's get this out of the way. "Canoe" is not an acronym.

The name literally describes the shape of a successful meeting, and how designing meetings that follow this shape will propel a team forward towards a common goal.

As if they were all rowing the same canoe.

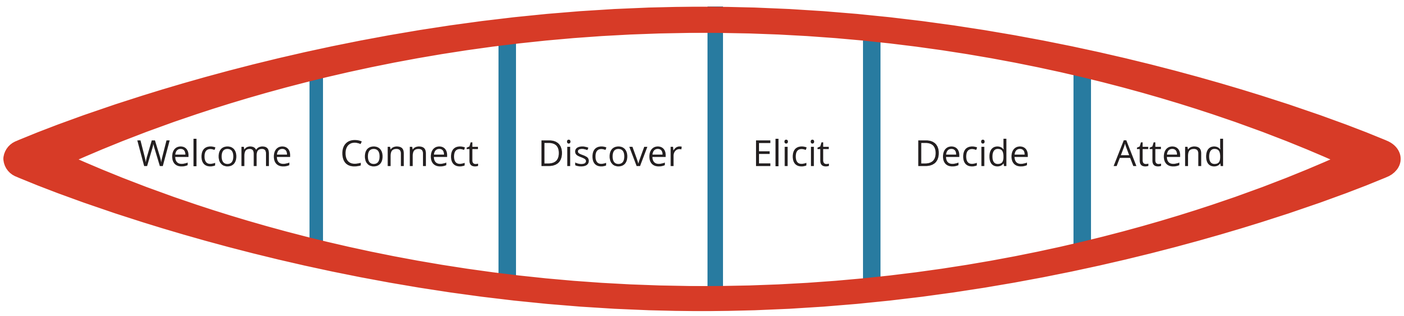
The Meeting Canoe™ Welcome, Connect, Discover, Elicit, Decide, Attend

The canoe has its own description of the phases in a meeting.

Emily and Dick really understand the importance of getting people engaged with each other before diving into the work. The Canoe model dedicates two full oars—"Welcome" and "Connect"—to becoming present.

The next three seats mirror Sam Kaner's Diamond. Breaking the work into explicit "Discover, Elicit, and Decide" steps is a great way to tidy up what can otherwise be a messy process.

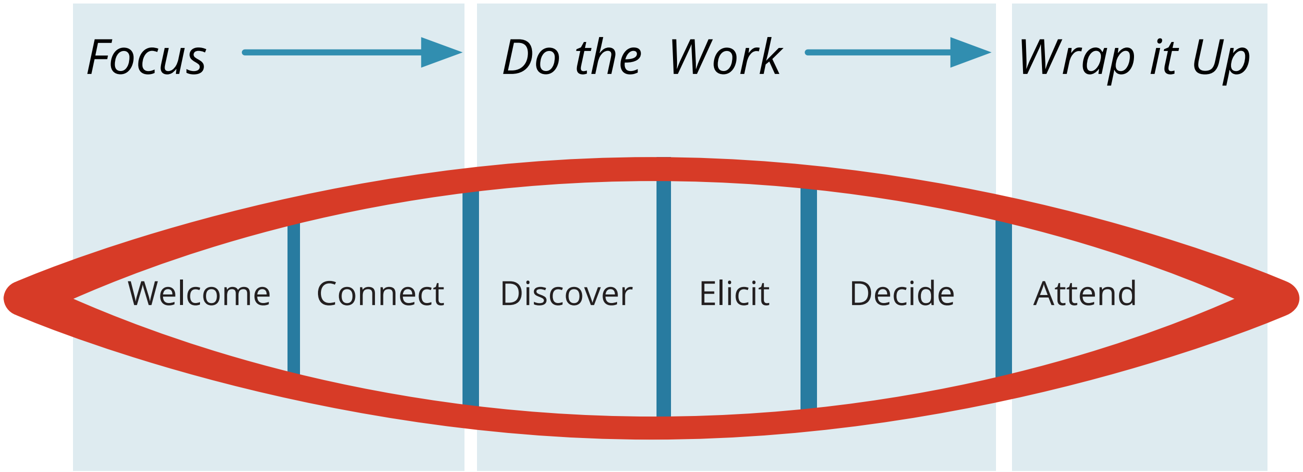
In fact, you can find many drawings of The Canoe™ from above, which boy—doesn't that look like a diamond?



The Meeting Canoe™, viewed from above

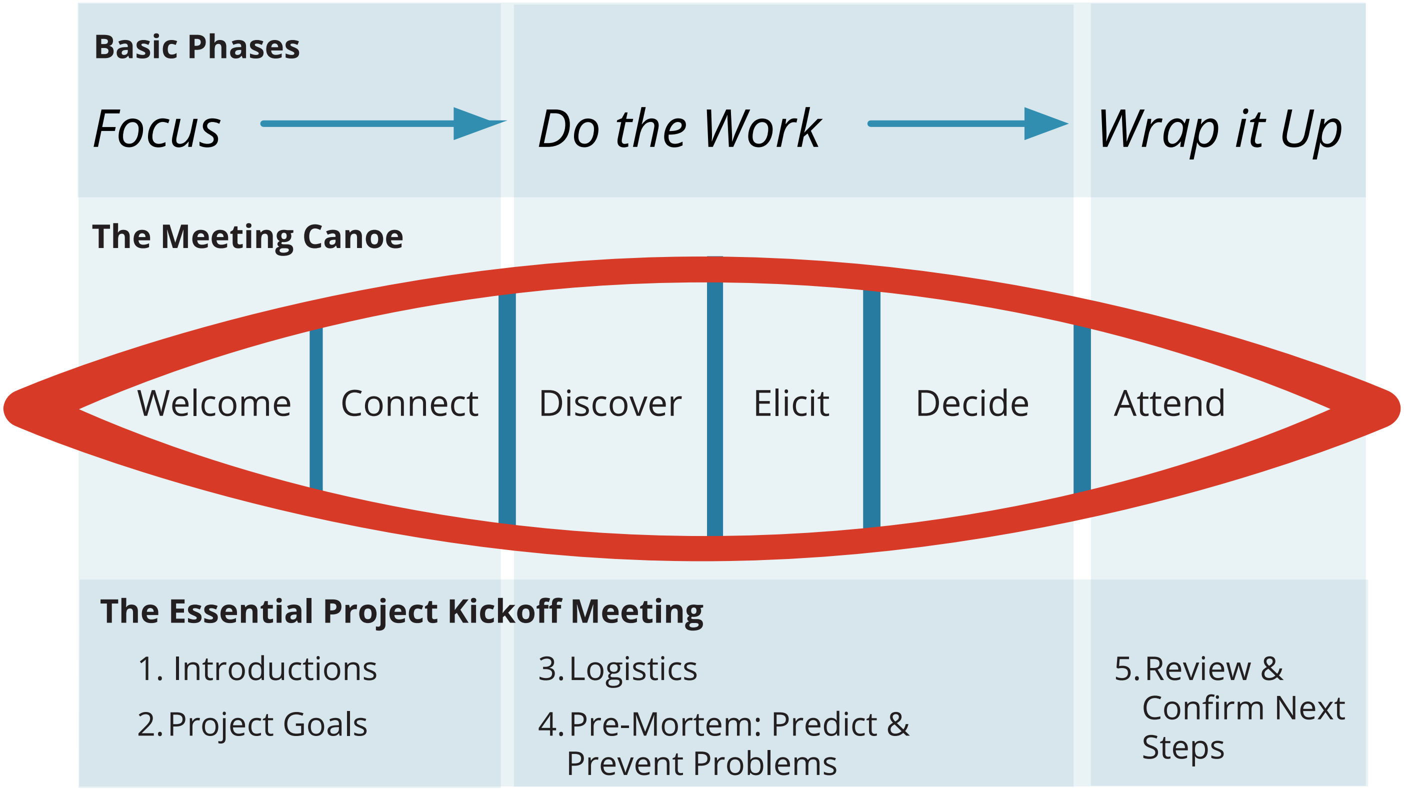
Personally, I find the "Discover, Elicit, and Decide" explanation a bit easier to use when planning a meeting. Where the concepts of *divergent*, *emergent*, and *convergent* group thinking can help us see how meetings impact group and project dynamics, a reminder to "Discover the way things are" feels a lot easier to translate into an agenda topic.

The last seat on the The Meeting Canoe™ is reserved for the wrap.



Here's how the 6 sections of The Meeting Canoe™ line up with the 3 basic meeting phases.

And here's how our most popular meeting design, the Essential Project Kickoff, maps to The Meeting Canoe™:



Basic phases at the top, the Meeting Canoe™ in the middle, and the agenda items in the Essential Kickoff Meeting at the bottom

Hero's agenda

Final shape! Just to mix things up, let's look at a structure laid out around a circle.

Dave Gray, co-author of [Gamestorming](), founder of [XPlane](), [BoardThing](), and the reigning champion of fun ways to visualize meetings, recently shared his structure for the [Hero's Journey Agenda]().

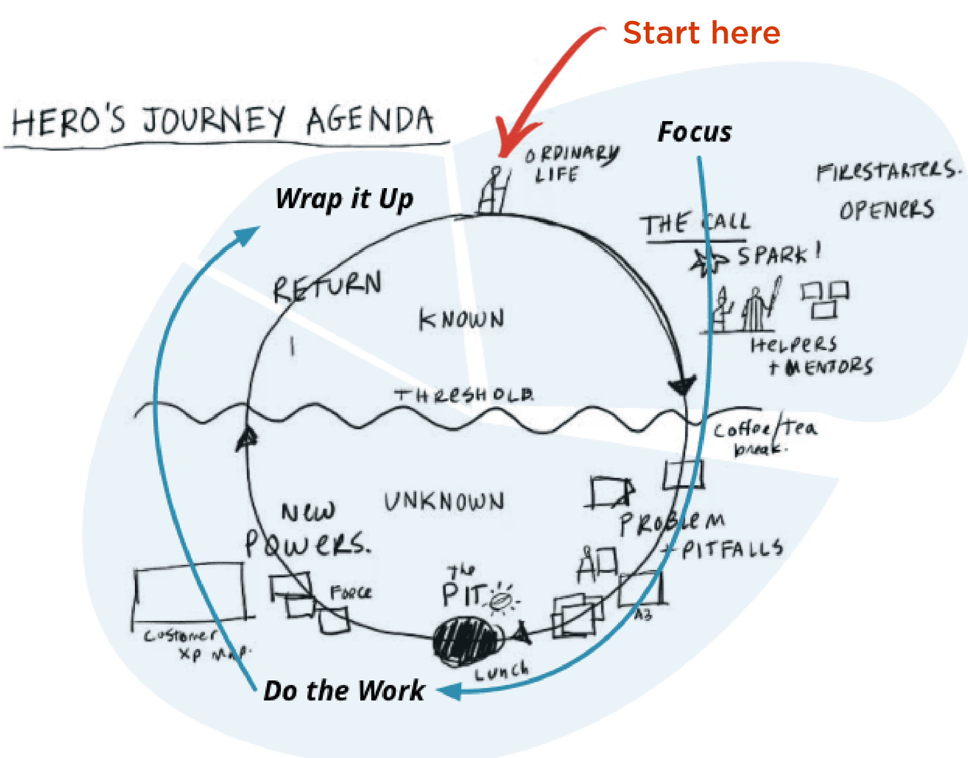
If you have a few minutes, learn the details on how this one works from Dave directly in his short video overview. https://medium.com/the-xplane-collection/how-to-create-an-inspiring-meeting-agenda-bf72911aa7aa

This agenda format is a mashup of the [Pie-Chart Agenda]() technique and [Joseph Campbell's Hero's Journey]().

The pie-chart technique lays out the agenda so it looks like slices of time on the clock. This is a simple and clever way to help a group see how they plan to break up the meeting time.

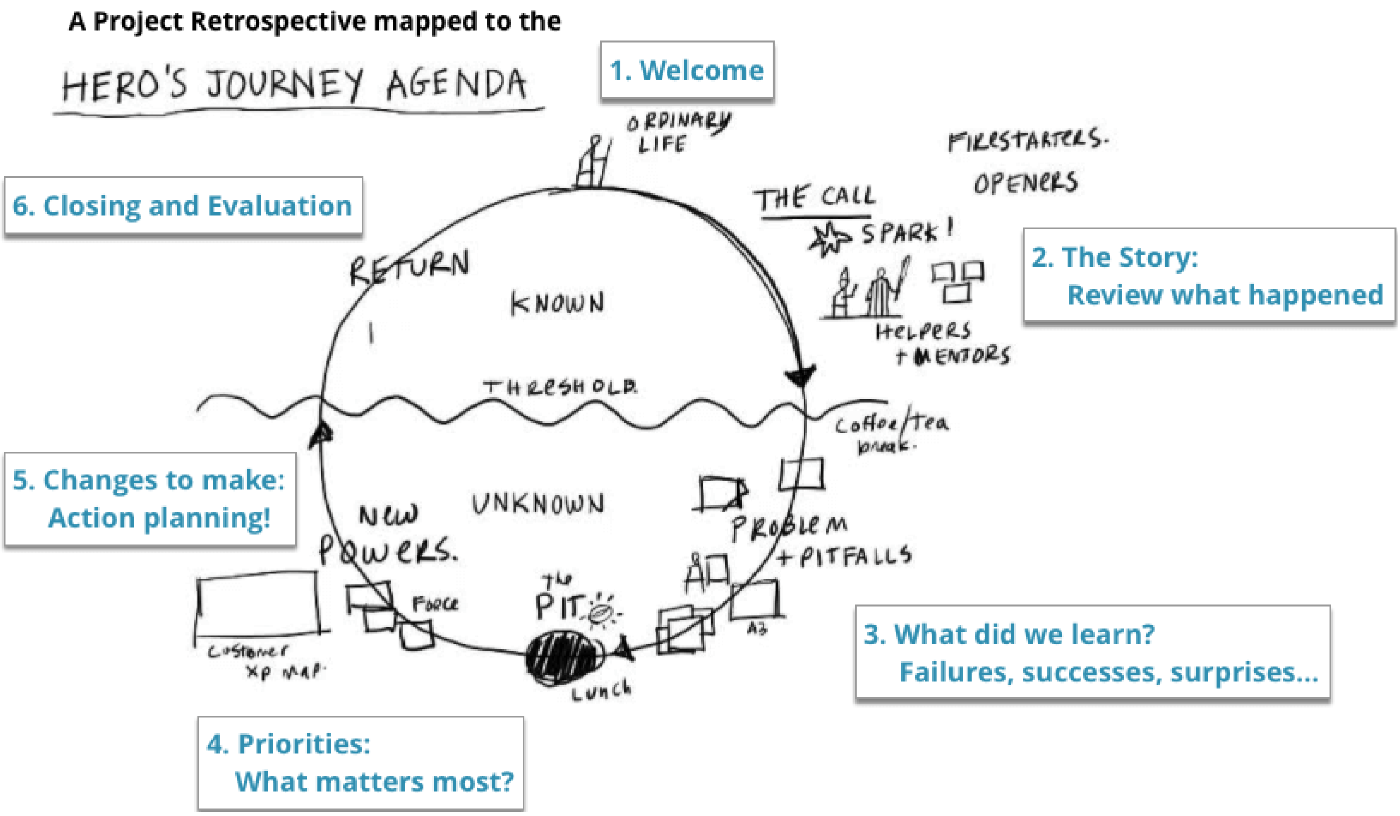
The Hero's Journey layers the structure of mythology onto the simple story line, tapping into the underlying forms found in the ancient narratives that teach, inspire and gel our societies. The Hero leads an ordinary life until confronted with a moment of crisis. The Hero sets out, overcoming challenges and seemingly insurmountable obstacles, until the Hero discovers the way ahead. The Hero returns victorious but forever changed by the journey.

In the Hero's Journey Agenda, a facilitator leads a group through these stages of challenge and discovery as they work to enact change. Even though this is intended as a model for longer events—workshops, off-sites, and the like—you can still easily see the common structure underneath it all.



The 3 basic phases overlaid on the Hero's Agenda

And a final example: here's how our Framework for Successful Project Retrospectives maps to the Hero's Agenda.



The Project Retrospective mapped to the Hero's Agenda

Oversimplifying there, much?

"But hold on!" you say. "There's something that doesn't look quite right in this last map. How exactly is a *Review of what happened* in a project supposed to qualify as *The Call* that *Sparks* the group into action?"

The answer lies in meeting design. A review doesn't have to mean sitting around watching someone talk through a slide deck. There are *lots of ways* to get the facts out there, many of which can be much more satisfying and effective than your standard slideshow snoozer.

The basic structure, as I mentioned in the very beginning, is about ensuring that the meeting *functions*. Functional beats broken, but it isn't exactly high performance.

Structure is the outline—not the color. If you want your meetings to be fun, engaging, creative, and maybe even passionate, you'll need to fill in that structure.

Meeting design is a form of experience design. Starting with a solid foundational structure, like the ones we've explored here, the meeting designer fills in more detail about how the meeting will run and selects a specific process for tackling every topic.

Will you start the meeting with small talk and biscuits, with basic introductions, or with a quick energizing activity? You know you need an opening; meeting design is the process of selecting which kind of opening to use for the meeting at hand.

Wrapping Up

(See what I did there, eh?)

By now, you should have a deep-rooted, down-in-your-belly gut feel for the structure of a functional meeting.

Getting everyone into a room to “chat and see what happens” does not qualify.

The status update “call-and-respond” drill also doesn’t cut it.

In successful meetings, teams:

1. Start by engaging each other, helping everyone become present for the work.
2. Do the work to co-create a new shared perspective.
3. Confirm decisions and commit to next steps in the wrap up at the end.

Chapter 4

Should you cancel your next meeting?

Every meeting takes up time that could be used for something else. Learn to recognize the signs of a potential time-waster and cancel bad meetings.

There's a meeting on your calendar that's fast approaching, but you're just not sure about it.

Maybe you're too busy. Maybe your co-workers are too busy. Maybe you see it as an interruption that will keep you from more important work. Or maybe the meeting is really important, but you're simply not ready.

Whatever the reason, you now wonder, should you cancel your next meeting? And if so, how can you do that without looking like a flake in front of the group?

Some meetings do more harm than good. If a meeting lacks a clear purpose, or the people you need aren't prepared, then the meeting just wastes time and can drain a team's energy. These vampire meetings prey on the productivity and good will of a group, leaving them de-energized and frustrated. Cancel those suckers!

A Checklist for Identifying Bad Meetings

Not sure if your meeting is one of the living dead? Here's a handy process to help you and your co-workers spot these vampire meetings and drive the cancellation stake through their lifeless cold hearts. Starting at the top, answer each question in turn.

If you are the meeting organizer:

These questions assume you're the person in charge of the meeting, and therefore the one responsible for using the meeting time wisely. If you answer "No" to any of these, you should either cancel the meeting or do the work required so you can answer "Yes."

If you are a meeting participant:

If you didn't call the meeting but suspect it's a waste of time, use these questions to request more information from the meeting leader. When that's not possible, skip ahead to the section titled: *What to do if you don't know why you're meeting.*

Question 1: Do you know the meeting's purpose?

Do you know why you need to meet, and why meeting would work better than chat or email in this situation?

- **Yes!** Great! Next question.
- **No?** Cancel it.

Making a decision, kicking off a project, figuring out how to handle an emergency—there are many good reasons to meet.

"Just because" is not a valid reason to meet. Because you always meet on Tuesdays, because it's on the calendar, because you're not sure and afraid to ask, because you don't have anything better to do; if you don't know why the meeting matters and can't find out, cancel it.

What to Tell the Group

> "Good news! It wasn't clear that this meeting would be a good use of time, so it's been cancelled. If you feel the meeting was important, please contact me and we can discuss a plan for rescheduling it. Otherwise, enjoy your meeting-free time!"

Question 2: Can you describe the intended meeting result?

Make sure you can fill in the blank.

Once we have ________________ , the meeting is over.

examples: a decision, clear next steps, a list of issues to resolve, a plan

- **Yes!** Excellent—on to question 3.
- **No?** Cancel it.

The meeting purpose explains WHY you need to meet. The intended result, also known as the desired outcomes, covers the WHAT.

What specifically will the team get out of attending this meeting? A new plan, a list of action items, a documented decision? You need to get this figured out. It doesn't have to be fancy or overwrought, but you need to know what you're asking the group to create before you take up their time.

What to Tell the Group

> "Sorry, but I need more time to prepare for this meeting to make sure it's worthwhile. I'm canceling this meeting for now to make sure we don't waste anyone's time."

Question 3: Do you have a plan for getting that result?

The plan covers HOW the group will achive the intended result. Your plan could be simply to ask a few questions, or it can be more detailed. For anything longer than 15 minutes, this usually means you'll have a version of that plan to share with the group in the form of an agenda.

- **Yes, of course.**
  You're on a roll! See question 4.
- **No?** Make a plan, or cancel the meeting.

Unless you're working in an improv troupe, your colleagues have better ways to use their time than to get in a room and watch you wing it. And as someone with a Bachelor's degree in theatre, I can tell you that good improv always begins with a goal, a basic plan, and an underlying code of conduct.

So I retract the exception. Pure "winging it" is just plain unprofessional. Bonus: when you work on the plan, you may find that ***you can achieve the desired result without meeting at all!***

Question 4: Are the people and resources you need prepared?

If you have questions people need to consider in advance, they've been considered. If there are reports to read or presentations to create, that's done too.

- **Yes!** Looking good… you might just have a worthwhile meeting in your future!
- **No?** Cancel, then reschedule.

You can't have a successful lunch meeting without food. You can't impress a client if you're not ready to talk about the project. You can't make a good decision if people don't understand the options.

If your plan for achieving the meeting result is shot for now, work with the group to find a better time.

What to Tell the Group

> "Sorry, but it looks like we're not ready to have this discussion. Let's reschedule for _____ to make sure everyone can come prepared."

Question 5: Did the people you need show up?

- **Yes.** Awesome! Have a fabulous meeting!
- **No.** Ouch!

Don't waste everyone else's time—cut the meeting short and reschedule. And that person owes everyone else a HUGE apology, ideally including chocolate.

What to Tell the Group

> "So sorry, but we need ______ here to be effective. Let's not waste any more time today. I'll find out what happened with _____ and try to reschedule as soon as possible."

Even better: Don't schedule inconsiderate meetings in the first place!

It all comes down to this: **Meet with Respect.** For many people, asking for meeting time is a big ask. Consider:

- They may be working on an important project that needs their undivided attention.
- They may have other meetings, with goals and plans and important work to do.
- They may have sick kids, dentist appointments, or any number of personal crises to juggle.
- They may be shy and uncomfortable in meetings.
- They may hate winging it, and find people who do unprofessional.

When you request a meeting, you're saying that your meeting is important enough to warrant everyone's time—more important than anything else they might need to do then.

That may be true. But before you put that demand on the calendar, use these questions to make sure.

Make People Happy

CANCEL BAD MEETINGS

Great meetings move work forward and build strong teams.
Bad meetings waste everyone's precious time.
Is your meeting ready?

1 The meeting has a clear purpose. No? Cancel it!

Yes! You need to work together as a group to achieve a result.

Email, chat, or other tools won't work as well.

2 The intended result is clear. No? Cancel it!

Yes! You can fill in the blank:

As soon as we ____________________, the meeting will be over.

3 You have a plan. No? Cancel it!

Yes! You know how to start, lead, and end the meeting.

You shared an agenda for any meeting longer than 15 minutes.

4 Everyone is prepared. No? Cancel it!

Yes! Presentations and reports are ready.

Everyone read the agenda and documents in advance.

5 The right people show up. No? Cancel it!

Yes! Nice work!

You're ready for a productive meeting.

What to Do If You Can't Cancel the Meeting

Sometimes you're faced with a meeting that threatens to suck, and you can't cancel it. Sometimes you know the meeting's purpose, but don't have time to pull together the rest.

Other times, it's not your meeting to cancel. You're an innocent victim, invited to a seemingly pointless meeting by someone whom you can't comfortably refuse.

In the previous chapter, I covered the basic structure that underlies all well-run meetings. A quick re-cap:

1. **Focus and Become Present**
2. **Do the Work**
3. **Wrap It Up**

The good news is that you can use this simple structure to save the day when you're faced with a meeting that you can't prepare for ahead of time. In fact, the default agenda in Lucid Meetings—called the "Basic Agenda"—includes just three agenda items:

1. Welcome: where you find out why you're there
2. Discussion: where you do the work
3. Review and Next Steps: where you wrap it up

Whether you're the meeting leader or an invited participant, you can emulate these steps by asking a few questions during the meeting.

When the meeting starts, ask:

How much time do we all have?

It's really easy for an agenda-free meeting to get all sloppy and run over time. Without any structure to the conversation, people can get into all kinds of interesting ideas and tangents, only to discover they have something really cool to work on just as time runs out.

You can help prevent this up front by asking: is the scheduled time fixed, or is it ok if the meeting runs long? Or, if you must end on time yourself, saying so up front helps everyone focus on achieving something before time runs out.

Then ask:

What would you consider a good result from this conversation?

Put them together, and it sounds something like this.

> "We have 30 minutes scheduled today. I want to be mindful of time; do you need to end right on time today?" or

> "We have 30 minutes scheduled today, and I need to end on time to make other commitments."

then:

> "In the time we have together, what would you most like to see happen? In other words, what would a really useful result from this meeting be for you?" or

> "I'm hoping we can achieve X in the time we have. Is that also what you'd like see, or are you hoping for something else?"

IMPORTANT: WRITE DOWN WHATEVER THEY SAY.

You do not need permission to take notes in a meeting, and you should not expect anyone else to do it for you if they haven't volunteered already. When you write down what everyone wants to achieve, you've got the purpose and expected result for your meeting.

Once you have a better idea of what everyone wants to accomplish, you can dive into the discussion. Ideally, the meeting leader would take responsibility for properly closing the meeting at the end, but if they don't, there's no reason you can't step up.

In the last 5 to 10 minutes, ask:

Did we get the result we wanted?

Because you asked about this earlier and wrote it down, you can now reference your notes and check this one with the group.

What happens next?

This is the moment to confirm any new decisions and action items. These two questions together might sound like this.

> "Ok, you said you wanted to achieve …*whatever it was*… do you feel we did that?"

then

> "Can we take just a quick minute to make sure we're clear on what happens next? I want to make sure I've catpured my tasks before anything gets lost."

Summary: Only You Can Prevent Bad Meetings

If you are the meeting organizer or leader, cancel the meeting if:

- The purpose, expected outcome, and plan are not clear
- The group is not prepared
- Critical people can't or don't attend

As a meeting participant, ask the leader to fill in any gaps above. If that's not possible, use what you know about the basic structure of an effective meeting to rescue a worthwhile result from an otherwise wasted time.

Chapter 5

How often should you meet? Selecting the right meeting cadence for your team.

The frequency of a group's regular meetings set the pace at which work gets done. Learn how finding the right cadence for a group depends on the kind of work they do.

What is a meeting cadence and why does it matter? In Chapter 2, I outlined two basic rules:

1. Meet to maintain momentum.

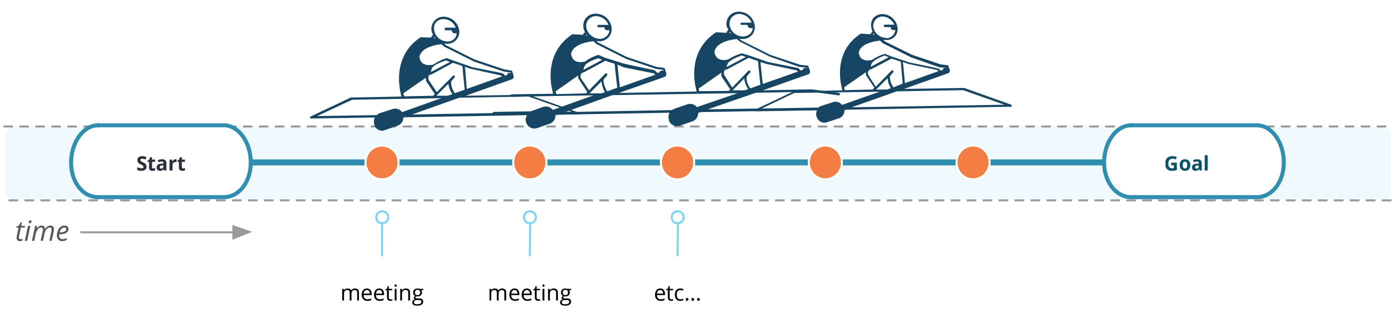
2. Meet to change course.

Kickoffs, retrospectives, emergency meetings, planning sessions, workshops, sales, negotiations—these all fall under the definition of "changing course." A team's *regularly scheduled meetings* should maintain work momentum and strengthen the relationships between team members. The frequency of these regular meetings sets the team's work cadence.

We use the term *cadence* here very deliberately. You may find others referring to this pattern of regular meetings as the team's *meeting rhythm*.

If the words cadence and rhythm bring to mind pictures of rowers at the oar, you've got the right idea. A meeting cadence works very much the same way—setting a pace that keeps a group pulling together fast enough to win the race, but not so fast that they wear out before they cross the finish line.

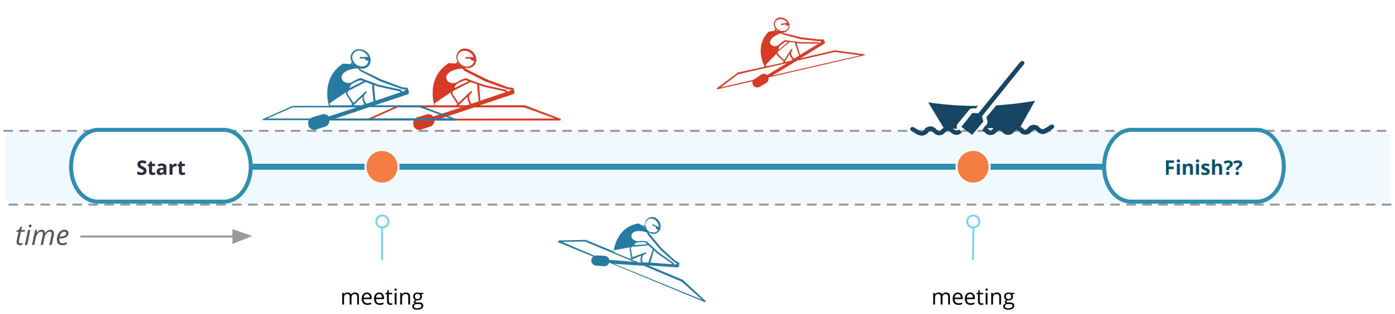
The right meeting cadence helps a team accelerate towards their goal.



I know, they're rowing backwards. But now they can see their goal before them!

Getting the meeting cadence right makes a huge difference in how well a team performs.

If you go too long between meetings, work will suffer.



Too long between meetings, and the team begins to head in different directions.

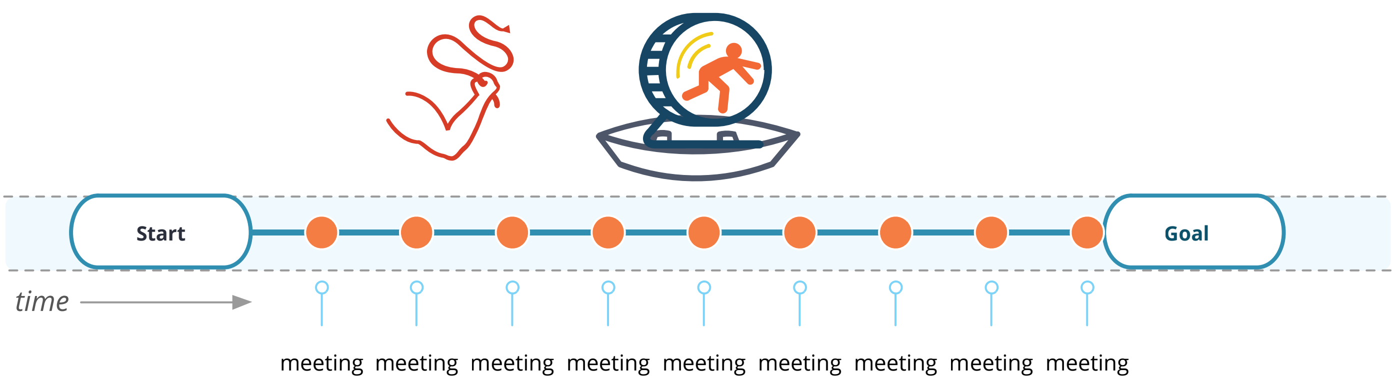
> "Over time, we've tried a multitude of formats for this (executive staff) meeting. Going longer than two weeks between meetings, I see the team get disconnected."
>
> – Damon Schechter
> *CEO Shipwire*

Teams that don't meet often enough drift out of alignment, lose information, and weaken the interpersonal bonds that help them work together.

> "Bi-weekly meetings = waste of time
>
> Weekly meetings = team momentum"
>
> – *Mike Kotsis*
> *Founder, GPS for Small Business*

That said…

Meetings always interrupt; they always prioritize time with the group over time that could be spent making individual progress. Meet too often and your team will feel they're on a treadmill.



Meet too often, and the team gets frustrated and worn down.

> "In the past, we tried the agile version of the 15-minute daily standup, but we found this was too frequent. Most days, team members didn't have enough new information to convey, making a majority of the meetings not useful. The daily format also required everyone to slot some part of their day, every day to chat. That was a lot of wasteful meeting overhead."
>
> – *Wade Foster*
> *CEO Zapier*

How to Find the Right Cadence for Your Team

I wish I could tell you that there was a straight-forward answer here.

The question "How often should we meet?" gets asked all over the place, and the answer is usually a variation of:

It depends.

To double the challenge, I was unable to find any meaningful research on the topic.

I asked researchers looking into meeting effectiveness what they knew, and while they have this great book full of fascinating studies, they had nothing when it came to finding a data-backed answer for how often a group should meet.

That leaves us with advice from consultants and the stories of those who've tried different cadences before they found one that worked. Lucky for us, there's a pretty good consensus between those who found their cadence through trial-and-error and the business consultant community.

Here's what we know.

Recommendations for Different Kinds of Teams or Groups

This chart summarizes the recommendations we found.

Recommended Meeting Cadences for Different Teams

Group/ Meeting	Daily: 10—20 min	Weekly: 45—90 min	Bi-Weekly: 30—60 min	Monthly: 2—3 hrs	Quarterly: .5—1 day	Annually: 1—2 days
One-on-Ones		**Yes**	*Maybe*	*Maybe*		
Department or Staff	*Maybe*	**Yes**		*Maybe*		
Project Teams	*Maybe*	*Maybe*	*Maybe*	*Maybe*		
Agile Teams	**Yes**	*Maybe*	*Maybe*			
Leadership Teams	*Maybe*	**Yes**		*Maybe*	**Yes**	**Yes**
Customer Success/ Account Management			*Maybe*		**Yes**	
All-Hands		*Maybe*			**Yes**	
Boards				*Maybe*	**Yes**	**Yes**
Committees		*Maybe*		*Maybe*	**Yes**	

IS THIS TOO MUCH TIME IN MEETINGS?

Regular meetings are a significant investment of your team's time, so some leaders try to minimize that investment by spacing meetings farther apart, or even canceling them all together.

This can be counterproductive, because when you wait more time between meetings, those meetings need to be longer and have a greater chance of running over time.

More importantly, meetings spaced too far apart just don't work very well. But, for the bean counters amongst us, let's look at the math to see how this works out.

Meeting Cadence	Hours Per Year
10-minute Daily	40
15-minute Daily	60
20-minute Daily	80
45-minute Weekly	37.5
60-minute Weekly	50
90-minute Weekly	75

Hours are per person assuming 240 days or 50 weeks worked per year, because you shouldn't attend meetings when you're on vacation or sick.

As you can see, whether you meet daily or meet weekly, you'll spend about the same amount of time in the end. You can also see how teams that meet both daily and weekly should be especially vigilant about keeping the daily stand-up short and the weekly meeting focused.

Regardless of the cadence you pick, most team members will spend less than 4% of their work time in this meeting. Knowing this, you can focus on the more important question, which is: how can you use that 4% to ensure the remaining 96% rocks?

You'll find more details about the recommendations for different groups below. Before we get there, though, let's go over the high-level criteria you can use to set the meeting cadence for any team.

Criteria for Picking the Best Meeting Cadence

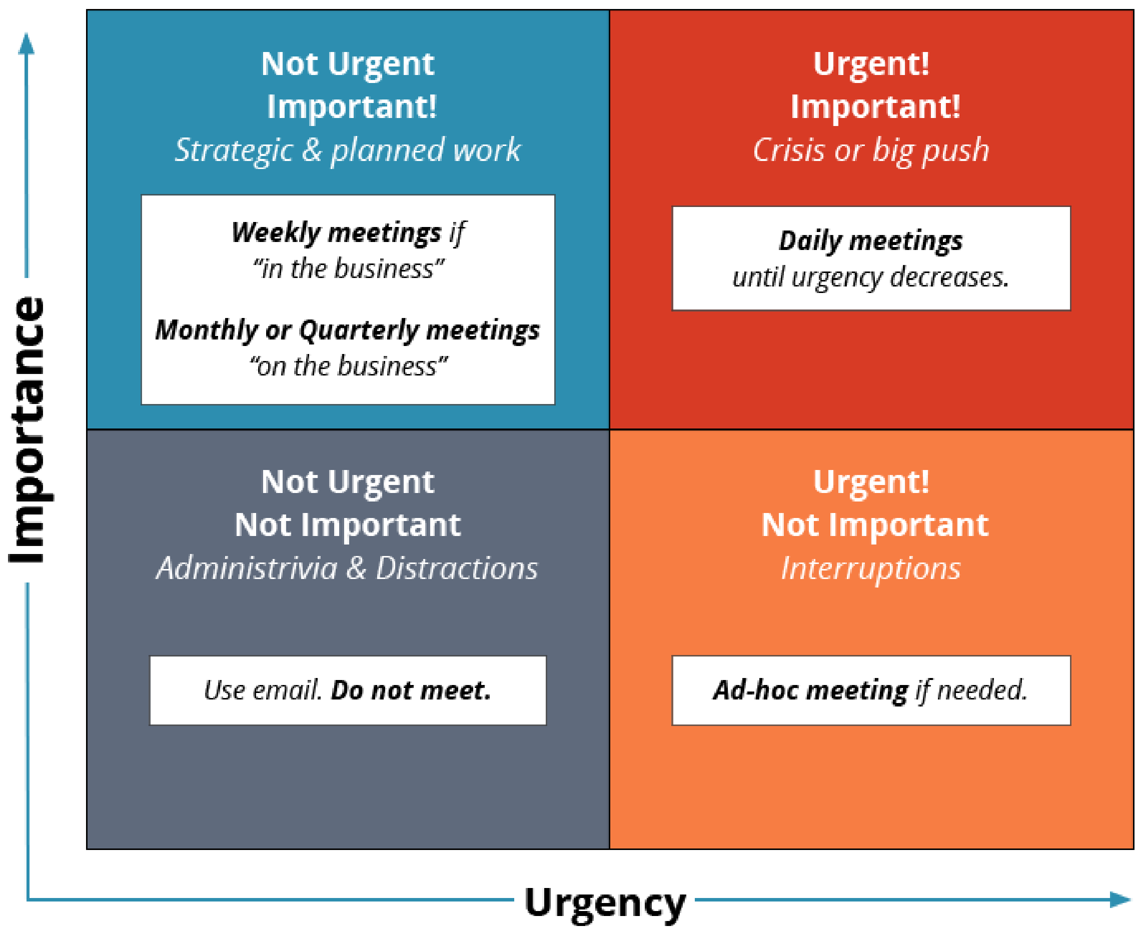
Like I said, how often a team should meet depends. But it doesn't depend on how they feel that day, or if they like meetings or hate them, or the industry they're in, or anything like that. The recommended meeting frequency depends on these factors:

1. Urgency & Importance

If the team pursues urgent and important goals, they need to meet often.

For example, hospital staff meet every day to ensure everyone knows the situation on the floor. Saving lives is both urgent and important, and it requires everyone to stay coordinated and informed.

By contrast, a homeowners association board will have bylaws governing when they have to meet. They rarely face an issue that they feel to be deeply important or urgent. Many HOAs must meet annually at a minimum, and they leave it at that.



Urgency and importance quadrant with meeting frequency & examples

2. Stability

> "Assuming that a sound strategic framework is in place and the leadership team is relationally mature, the leadership team can establish an effective cadence that will help it to drive the organization's strategic intent."
>
> – *Jack McGuinness*
> *Managing Partner of Relationship Impact*

Those are quite the assumptions!

Many teams *do not* operate within a sound strategic framework. More frequent meetings help these teams create a shared understanding of their environment so they can establish this framework. And as for "relationally mature"? At the very least, that takes time.

New teams, teams with high turn-over, and teams with one or more…uh… relationally challenged team members also need to meet more often to bridge natural gaps in trust.

> "It typically takes about 6 meetings before teams start to 'get it,' and then you can relax a bit."
>
> – *Dan Prock*
> *Facilitator, Author, Lean & Kaizen Coach*

In the articles linked below, you'll see several people say that they meet much more with a new team. Boards also ramp up their meeting cadence during times of crisis.

When the situation is unstable, teams need to put in the time to stabilize it. This means more frequent meetings.

Teams can change their cadence to fit circumstances. Daily meetings help teams get through times of crisis and transition.

Alternatives to Meetings

A regular meeting cadence gives teams a way to share information, raise and solve issues, and build relationships. But there are lots of ways to accomplish these same goals outside of a meeting. Slack, Skype, email, reports, just turning around and talking with someone … there's no need to wait until a regular meeting if you've got something important to share.

If your team thrives on text-based communication, you can probably meet less frequently.

If that's you, focus more time on team building when you meet.

That said, with increasing awareness of the anxiety/addiction impact of constant communication, and the growing push to minimize distractions (like text, chat, email, etc.) to maintain work focus, these channels become unreliable.

You can't know IF or WHEN your team will read that email or chat message.

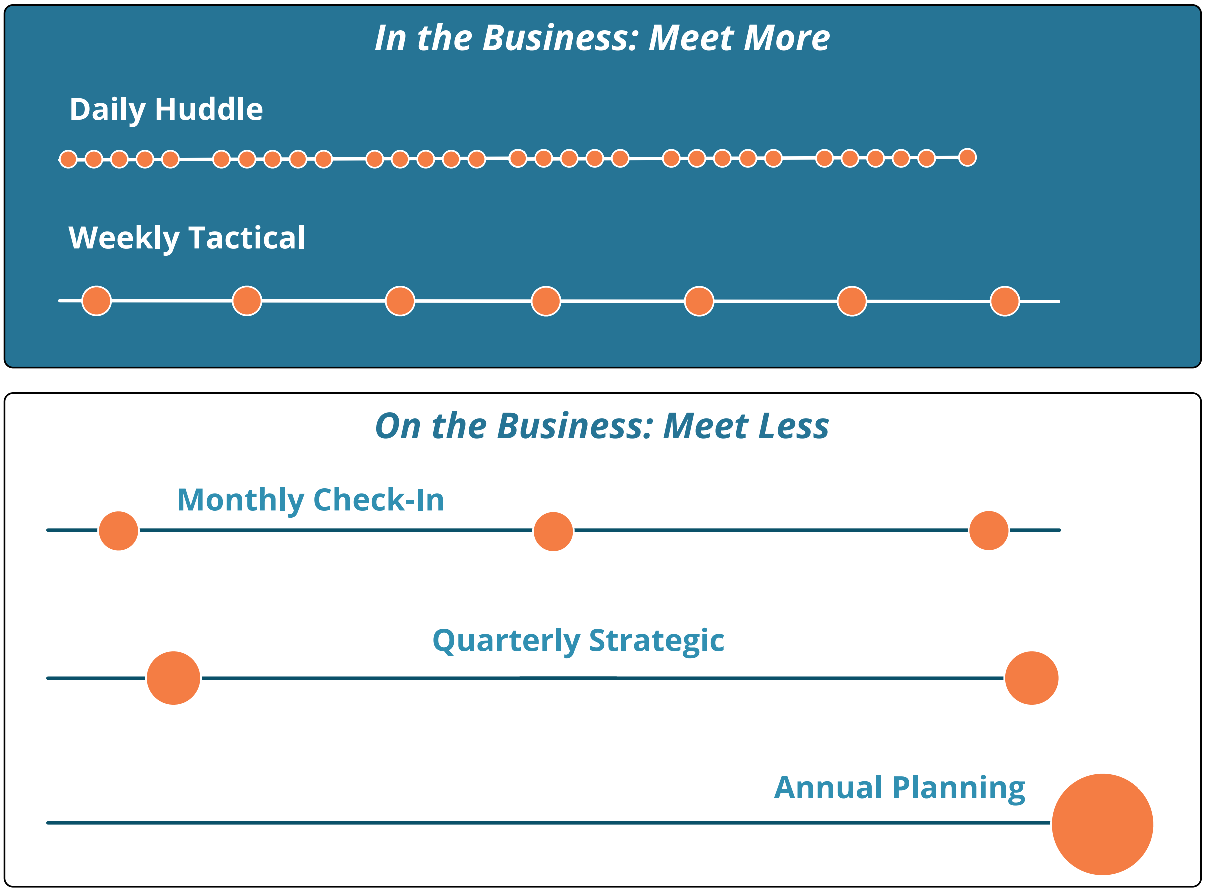
The predictability of a regular meeting cadence lets team members plan their time to *maximize productivity and minimize distractions*, knowing that they'll have an opportunity to synch up with everyone else at the scheduled time.

3. Work Function

Does your team work "in the business" or "on the business"?

Teams actively collaborating to produce a work product of some kind should meet often. Recommendations range from meeting every day to—at the very outer limits—no less than once per month.

Groups with oversight, governance, and strategic planning responsibilities meet less often. Recommendations here range from once per month—at the most—out to once per year.



Teams creating the work meet daily or weekly, while teams setting and managing strategy meet less regularly.

There are groups that operate in both capacities. A company's leadership team manages day-to-day delivery and execution on the higher level strategy. No wonder leaders meet all the time!

Both functions have their own cadence, and for groups with this kind of dual responsibility, it's important to recognize what kind of meeting you're scheduling and plan accordingly.

4. Interdependence

How dependent are the team members on one another to accomplish their goals?

In many product development teams, each person must collaborate with several others to bring a product to market. Is the designer running behind? Problems in QA? New requirements from the client? Any shift in timelines or expectations ripples through, impacting everyone else. This is one reason Agile, which relies on a daily meeting to keep people coordinated, has become so popular with teams like these.

By contrast, mid-level service managers and franchise owners operate largely independently. The problems that plague a franchise in one location may have no impact on a different location. It's useful for these professionals to meet semi-regularly to compare notes, share insights, and work to change those few things that affect them all. But that's it.

5. Location (or Lack Thereof)

Small teams that work together in the same room don't need to meet much. When you all learn about changes in work environment because you were there to witness that change, you don't necessarily need a meeting cadence.

When I was a pancake waitress, my work was very dependent on the performance of my co-workers, and always highly impacted by changes in our environment. But we never had a regular team meeting—we just watched, talked to each other, and busted out tasty pancakes.

Now, I work on software with a distributed team. We have a partner currently trekking the Sahara and employees many time zones away. Today, my work is far more independent, and far more relaxed, than when I wore a pink apron every day. And yet, we meet very regularly.

There are two big risks with distributed teams:

1. **Out of sight, out of mind**
   It's easy to get caught up in what you're doing and forget to check in with your team members. And the flip-side of that…

2. **Bad assumptions**
   In which people either assume everything is going fine, because they haven't seen otherwise OR, because they can't see their team working, assume that they're not on task.

Virtual teams can mitigate both of these risks by meeting more frequently.

The Details Behind the Recommendations

These recommendations are ours, synthesized from our extensive reading, work with meeting experts, conversations with customers, and the hard-won lessons of long careers. So, you know, it's a pretty darn informed stuff.

That doesn't mean everyone will reach the same conclusions we have. If there's one thing everyone agrees about when it comes to meetings … well, I'd love to hear what that is!

To make an informed decision when it comes to investing your team's time, dive into the details below. For each kind of team, I've outlined our recommendation and then shared what other people recommend. Second opinions abound!

One-On-Ones

One-on-ones are meant to strengthen working relationships, address and resolve issues impacting an individual's work, and to support career development.

Most experts recommend holding one-on-ones weekly, but acknowledge that this can be a scheduling challenge, which leads to lots of one-on-ones that get cancelled. So they say:

> "Whatever you choose, it is important to remember that the longer you go between sessions, the less timely, and less accurate, the information will be, and the less likely it is that you will be able to intervene in an issue while it is still young."
>
> – *Richard Wanner*

A CASE FOR WEEKLY ONE-ON-ONES

- Damon Schechter runs weekly one-on-ones with his reports, and encourages his executives to schedule one-on-ones with each other too.

ADVOCATES FOR OTHER CADENCES

- Answers to this question on Quora range between weekly and monthly.
- Paul Axtell, who authored two one-on-one templates for the Lucid template gallery, found weekly, bi-weekly or even monthly one-on-ones work in larger corporations.

Department or Functional Group (Marketing, Sales, Finance, HR, etc.) a.k.a the Staff Meeting

Weekly meetings are the gold standard here. We agree.

OTHER PERSPECTIVES

- The teams at Froenetics advocates for both weekly and daily meetings.
- Hubspot's marketing team shares tips for daily "huddles", weekly and monthly department meetings.
- "Weekly or more" is the answer to how often sales and marketing should meet together.
- And it's weekly again for the sales team on its own.
- Finance, HR, Logistics, DevOps … what about everyone else? Apparently those of you who don't blog for a living have less to say on the matter! For you, I recommend searching for advice about "the weekly staff meeting."

But—weekly team meetings suck!

The regular weekly meeting—whether it's a department meeting, a project update, or a leadership meeting—is one of the worst run, most poorly planned, and deeply despised of all meetings. Our consulting team hears complaints about the weekly meeting all the time. We've even given it a nickname: *The Dreaded Wednesday Meeting.*

Yet the recommendation stands. If you want to maintain work momentum, you need a weekly team meeting.

A study of managers in the workplace found that:

> "Managers who were deliberately redundant moved their projects forward faster and more smoothly."
>
> – *Professors Tsedal Neely of Harvard and Paul Leonardi of Northwestern, on HBR.com*

A well-designed regular meeting agenda proves the perfect vehicle for *repetitively, redundantly, and usefully* emphasizing what matters most for your team's success.

"Well designed" is the key. We'll look at how to design your own agenda in Part 2, but in the interim, browse our templates for some great examples.

Project Teams

How often should your project team meet?

It *really* depends. This was the one place where a strong recommendation was hard to make, for several reasons.

- **Project teams have several kinds of regular meetings.**
  Internal project team meetings usually happen more frequently than updates with clients and other stakeholders.
- The recommended meeting **frequency depends more on urgency and importance** than for other kinds of team meetings.

A team on an urgent one-month project should meet daily, while a team on a multi-year project may only need to meet once every few weeks or even once per month.

ADDITIONAL RESOURCES

- Lynda.com: How often should I have progress meetings?
- From Project Connections
- From BrightHub

Our recommendation: When in doubt, project teams should meet weekly.

And for those projects that move really fast, consider checking out …

Agile Team Meetings—err, Ceremonies

If you work on a team that's adopted an agile methodology (Scrum, Kanban, XP or the like), then you already know the recommendations here.

Agile teams hold very short daily meetings to ensure issues get uncovered as quickly as possible. Agile teams also meet at the start and end of every iteration, which often means at least two longer meetings every few weeks. The cadence for these longer meetings depends on the length of each iteration. Atlassian has a nice short post that describes regular agile team meetings.

Software teams are the most likely groups to use an agile methodology, but there's no rule saying only software folks can run stand-ups. If you have a group that works really fast and has trouble keeping it all together—or if you have a group that *should be moving faster*—an agile meeting cadence may improve the situation.

Related: Debunking 4 Common Myths about Agile Stand-Ups

Leadership Teams

A healthy, productive leadership meeting cadence can make the difference between an organization that struggles to survive and an organization that thrives and grows.

And while we don't have research on *how often* teams should meet, there's a ton of research on leadership effectiveness. We know that how leaders make and discuss decisions, how well they coordinate across departments, and how adept they are at identifying and solving problems will have a massive impact on the organizations they lead.

There are two categories of leadership team meetings.

- Daily and/or weekly meetings to share information and solve detailed problems
- Monthly, quarterly and annual strategic meetings

Every recommendation we found agreed that leadership teams *must hold these regular meetings* to be effective:

1. **An annual meeting** to set the overall strategy
2. **A quarterly meeting** to adjust strategic plans as needed
3. **A weekly meeting** to review performance and solve problems

Others also recommend a daily leadership huddle and a monthly strategic check-in. An all-you-can-eat buffet of meetings!

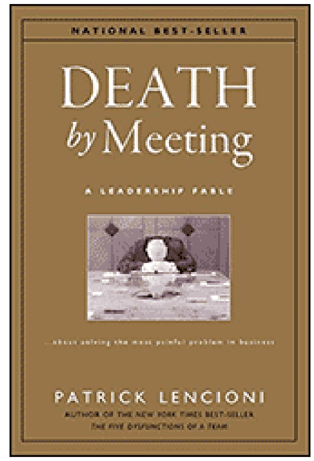
At Lucid, we follow the core recommendations in bold above. We meet every week using the same agenda to monitor and manage our day-to-day operations. We meet quarterly (well, usually) to adjust strategy. And we update our strategic plan at the beginning of every year.

Because getting the cadence right is so critical to leadership team performance, the expert consultants don't leave this to chance. They spell out not just how often teams should meet, but exactly how long each meeting should last and the agenda to use.

Here are some examples.

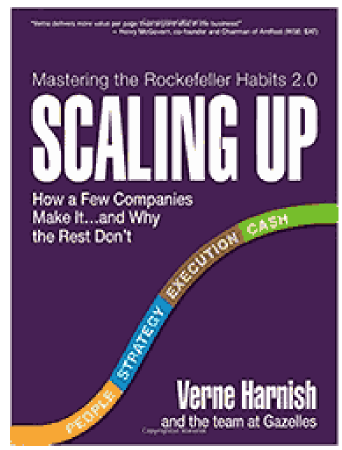
Recommended Leadership Team Cadences

Patrick Leoncini, author of *Death by Meeting* and *The Five Dysfunctions of a Team*, and his firm The Table Group, prescribe this meeting cadence.



- A daily check-in to share schedules and activities
- A weekly tactical meeting to review weekly activities, resolve tactical obstacles and issues
- A monthly strategic (or ad-hoc strategic) meeting to address critical issues affecting long term success
- A quarterly off-site to review strategy, competitive landscape, industry trends, key personnel, and team development

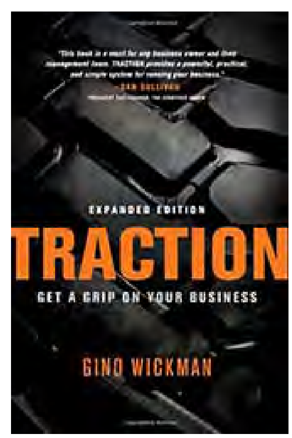
Verne Harnish and his firm Gazelles consult with high-growth companies working to scale without imploding. They outline what they call the "Rockefeller Habits", which includes this meeting cadence.



- 7-12 minute daily "adrenaline" huddles
- 60-90 minute weekly operational and tactical review
- .5-1 day quarterly review and group education session
- 2 day annual planning

Quick note: Many say the daily huddles have revolutionized their work in a good way. So while a daily meeting may be too much for some teams (ours included), it could be just right for yours.

Geno Wickman lays out a clear meeting cadence as part of his team's Enterpreneur's Operating System. I think the *Level 10 Weekly meeting* is particularly well designed. Their cadence:



- 90 minute weekly operational meeting, aka The Level 10 Meeting
- 1 day quarterly strategic reconnect and adjustment
- 2 day annual strategic planning

Jack McGuinness, Managing Partner of Relationship Impact, recommends this cadence.

- 1 hour weekly meeting to track and monitor execution
- 2-3 hour monthly meetings to correct deviations
- 1 day quarterly meetings to review results and adjust strategy
- 2-3 day annual meetings to set targets

Level up! Company-Wide Time Blocking

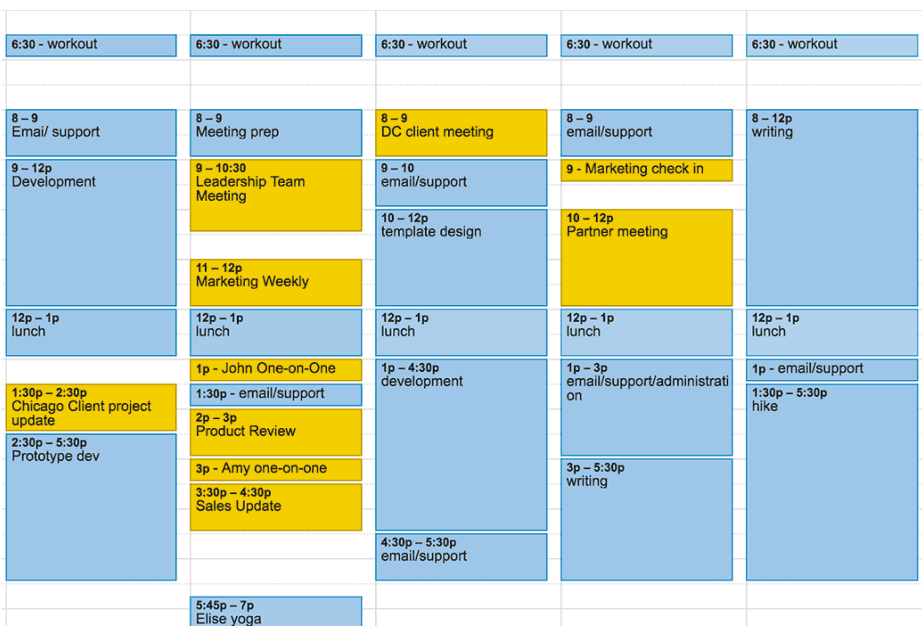
Are you exhausted by the prospect of all these daily, weekly and quarterly meetings yet? Wondering how you're going to get anything else done with all these meetings in the way?

Yes, you need to have regular meetings. But that doesn't mean they should be allowed to pop randomly across your calendar like bad acne. As a leadership team, consider using time blocking to keep meetings productive and minimize disruption to the rest of the work week.

I love time blocking as a personal productivity tool, and find the idea of applying it to a whole team or company terribly exciting. Apparently I'm not alone. You can read more about this at the end of Forbe's profile of Jack Dorsey.

How it Works

- **All weekly meetings, for all departments and projects, happen on the same day.** This means people attend several meetings that day, getting into "meeting mode." Tuesdays are a popular choice for Meeting Day.
- **One day a week is designated as "No Meetings" day.**
  Everyone can plan to spend the full day focused on completing her or his part of the work.
- Theme other days as appropriate.



Meetings are yellow. Regular meetings scheduled on Tuesday, leaving other days free for focused work and client meetings.

Research shows we take an average of 25 minutes to get back on task when we're interrupted, and meetings are always an interruption—unless that's the main focus for the day!

A designated meeting day makes it easier to embrace the work required to make those meetings productive. And planning to spend your day in meetings is a lot easier when you know you'll have a day without any meetings soon.

Client Account Management and Customer Success

Account representatives act as the "board" in charge of overseeing the company's relationship with a client. Like all higher-level "on the business" functions, account managers use a more infrequent meeting cadence.

When a client seems happy, account managers schedule meetings quarterly to ensure the relationship stays strong. This meeting cadence is known as the QBR: Quarterly Business Review. If there is a contract to renew, that will be the main topic at one of these quarterly meetings.

MORE ON THE QBR

- From the finance sector
- From Gainsight, a Customer Success platform

When an account is in trouble, a good account manager will ramp up the meeting cadence. After getting the right people involved to work on a customer's issue, the account manager schedules bi-weekly check-ins designed to repair the client relationship.

Interestingly, it is only in situations like these that we recommend a bi-weekly cadence.

What about bi-weekly meetings?

Time and time again, we read about people who tried switching their team meeting cadence to every other week, hoping to cut back on the amount of time wasted in meetings, and then went back to weekly meetings soon thereafter.

We tried this ourselves in the past, and saw a disheartening drop in team productivity. Bi-weekly meetings are too far apart for most teams actively doing the work.

We saw 3 situations where bi-weekly meetings succeeded:

1. Account managers working to improve a rocky client relationship
2. One-on-ones in a stable team
3. Project updates to external stakeholders on a long-term project

In each case, the bi-weekly meeting is designed to improve a working relationship. For example, a successful bi-weekly project update focuses less on specific details and more on building stakeholder trust, giving everyone just enough visibility to feel confident about the project's success.

If you need to repair or maintain a relationship, *but don't need to work through decisions and details*, consider a bi-weekly cadence.

In most other cases, bi-weekly doesn't work.

All Hands

How often should you meet with the whole company? All-hands meetings are expensive, hard to coordinate, and often uni-directional, giving those attending little opportunity to participate. For larger, established companies, it's sufficient to have an all-hands meeting every 6 months or so.

This is also the recommended cadence for company retreats in distributed companies. If your workforce is highly distributed, getting them all together every 6 to 8 months significantly improves working relationships and accelerates productivity.

Smaller companies hold all-hands meetings quarterly. Quarterly all-hands meetings often line up with the quarterly board meeting schedule. This gives leadership a chance to share the same insights and performance information with employees that the board sees, and to communicate any new board resolutions that impact everyone.

In very small or new companies, there's no difference between an all-hands meeting and a "staff" meeting. New companies may gather everyone to meet every week. While technically this is an "all-hands", there really aren't that many hands involved, and the guidance for department meetings applies.

ADDITIONAL RESOURCES

- On Entrepeneur and again
- On Quora
- From Clear HR Consulting

Boards

We already talked about how mostly volunteer boards such as HOA boards, with mandatory meeting requirements but no other real pressing business, can meet as infrequently as once per year. Setting those aside, **the most frequently recommended cadence for board meetings at stable organizations is quarterly**.

Quarterly meetings (so 4 meetings per year), with the major focus of each meeting planned in advance, give boards at stable organizations enough time to complete their duties. A cadence like this can work, but it increases the importance of communication between meetings. For a board that only meets 3 or 4 times a year to be effective, you need to ensure information gets to the board members between meetings, so meeting time can be reserved for discussion and decision making.

Many boards meet more frequently. Volunteer boards in organizations where the "board" and the "organization" are pretty much the same thing, such as Parent Teacher Associations and the like, meet every month.

Boards for companies in transition—newly founded companies, and those facing acquisition, merger, a major leadership shakeup, financial emergencies, legal trouble, etc.—will also meet much more frequently.

ADDITIONAL RESOURCES

- Brad Feld feels startup boards should meet 8 to 12 times per year at the beginning, then 6 times per year as they mature.
- Dani Robbins at Nonprofit Evolution prefers monthly meetings for Boards.
- Boardworks International and Early Stage Tech Boards also advocate for an initial series of monthly meetings that later transition to quarterly.

Committees

Last but not least, the committee meeting. The best way to determine the right cadence for your committee meeting is by checking the committee's charter.

If the committee is temporary, with a single task to complete before it disbands (a nominating committee, for example), then meetings should be scheduled the same as they would be for a project team.

If the committee has a long-term governance mission, like a technical standards committee for example, then meetings should be scheduled more like board meetings.

Whether using a production cadence or a governance cadence, committee meetings should always be scheduled with the board meeting dates in mind. Schedule committee meetings so they can complete their business before the board meets.

MORE ADVICE

- BoardPad offers these *Tips for Effective Board and Committee Meeting Scheduling*.
- This advice for Health and Safety Committees recommends scheduling committee meetings to coincide with inspections. Clearly specific to this situation, but good advice that has parallels for many other committees.

Conclusion: Guidelines for Setting a Cadence

Now after all that, we're back where we started. The answer to the question "How often should my team meet?" remains "It depends."

Does your team do the work, or do they plan and oversee the work? Is it more important for you to wrangle details, or to build trust? If you miss a meeting or two, how well can you predict what happened in your absence?

All of this nuance can be frustrating. There is no right answer for everyone. There's not even a guarantee that the right answer you work so hard to find today will stay the right answer tomorrow.

Please resist the temptation to oversimplify this one. In the charts and examples above, you've seen clear guidelines and strong recommendations.

The core guidelines:

1. Teams work best when they establish an effective meeting cadence.

2. A cadence that's too fast or too slow proves counterproductive.
   Channel your inner Goldilocks and work to get this just right.

3. Teams actively working to produce something should meet frequently; daily or weekly meetings often work best. Also—time blocking! So cool.

4. Teams working "on the business" should meet infrequently; monthly or quarterly work well.

To achieve high performance results, we must embrace this complexity. Cadence is just one part of the picture. Teams need to meet regularly, but more importantly, they need to be running effective meetings.

Chapter 6

The Meeting Performance Maturity Model

What does it look like when an organization runs consistently effective meetings? This model describes organizational meeting culture at each stage of the journey towards a mature meeting practice.

Learning to run a meeting well is a worthy accomplishment. In successful meetings, teams unite and work takes flight. When all goes well, that is. Run poorly, meetings are a blight on productivity.

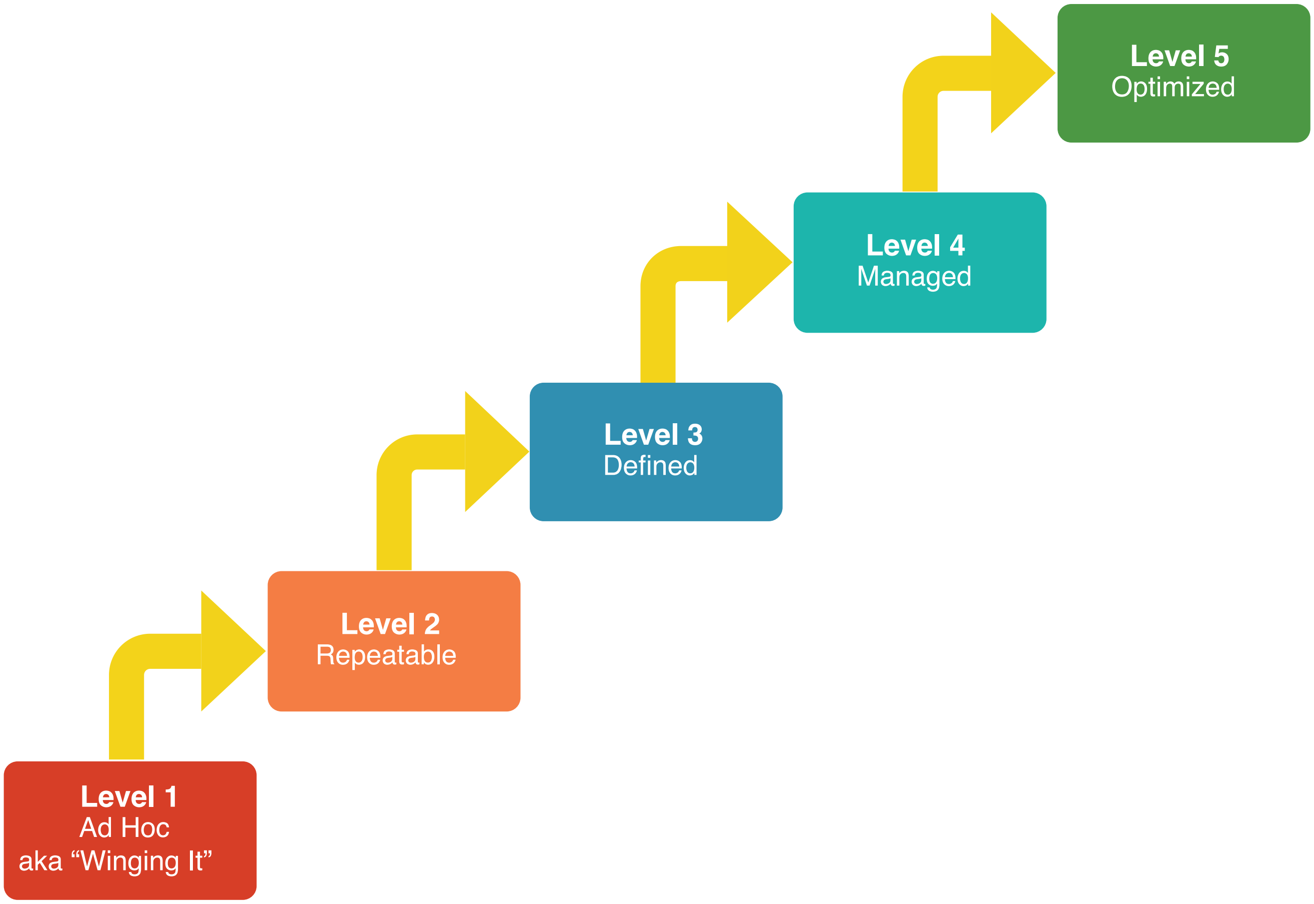
Leading one good meeting matters, but as we all know, meetings are not solitary beasts. Only bad meetings live alone; failed sales calls and botched negotiations are not joined by a second meeting. The rest of our meetings travel in packs, each connected to and reliant on the success of the meetings that surround them.

Some organizations understand this. They know that the way meetings work has an outsized impact on how the organization works. Some organizations put this understanding to work, and actively shape the meetings that shape their culture. They know that how they meet largely defines who they are.

We can chart how well an organization manages meetings with a standard performance maturity model.

Overview of the Meeting Performance Maturity Model

The levels of meeting performance maturity described here build upon those defined in the [Capability Performance Maturity Model], a standard which can be applied to many organizational functions.



The 5 Levels of Meeting Performance Maturity

Level 1: Ad Hoc—"Winging It"

- Almost no repeatable meeting process.
- Meetings are poorly controlled and reactive.
- Success is entirely dependent on the individual meeting leader's ability.

Level 2: Repeatable—Dependent

- Meeting success is managed by one or more skilled individuals who "know what to do".
- Individuals improve through independent learning, but there is no organization-owned focus on meetings.

Level 3: Defined—Standardized

- Standard meeting processes are defined for key meetings within the organization.
- The organization provides some training and guidance on how to run meetings.
- Individuals tailor their processes from the organization's standards.

Level 4: Managed—Core Competency

- The organization monitors and measures meeting performance numbers.
- Standard meeting processes get updated, and new ones are added as needed.
- Facilitation is a recognized and supported skill.
- Individuals become accountable for achieving meeting performance expectations.

Level 5: Optimized

- The organization maintains critical focus on meeting effectiveness.
- Feedback loops are in place to update and adapt meeting processes.
- The organization ensures access to trained facilitation resources.
- Individuals expect effective meetings.

Meeting Performance Maturity in Practice

Moving beyond the basic definitions above, what does meeting performance maturity look and sound like in an organization?

First, meeting performance maturity is rarely equal across an entire organization. Larger corporations may have varying degrees of meeting maturity by department or location. When our consulting team works to evaluate a group's meeting performance maturity, we look at *how they operate most often*. Here, the exceptions quite regularly prove the rule.

MEETINGS VS. CONVERSATIONS

Before we go further, we need to establish what we mean when we talk about meetings.

Let's start here.

> **Conversation:**
> ***the exchange of ideas by spoken words***

Next:

> **Meeting:**
> ***a defined real-time gathering of two or more people for the purpose of achieving a common goal through conversation and interaction***

Meetings have three qualities which clearly differentiate them from conversations:

1. **Meetings are declared.**
   Someone decides that a meeting should happen with some group of people. Usually this results in someone scheduling a meeting.
2. **Meetings have a purpose.**
   While the purpose may not be clear to everyone in attendance, there is always a reason someone felt they needed to declare a meeting.
3. **Meetings have a defined start and end.**
   Each meeting has a clear before, during, and after.

By contrast, conversations can just happen when two or more people bump into each other. Conversations wander. They don't necessarily need to come to any conclusion, or have any real reason for taking place. Finally, conversations can spread out over time, starting one day, picking up again by email, then continuing over dinner some time later.

To achieve meeting maturity, an organization must understand, design, and manage meetings to serve their purpose within their allotted time. We can measure both the effectiveness and efficiency of a meeting. When people see meetings as nothing more than *pre-scheduled conversations*, they run bad meetings.

> **Meeting Performance Maturity:**
> ***The degree to which an organization optimizes meetings to achieve their purpose.***

Level 1 Organizations

Level 1
Ad Hoc
aka "Winging It"

A Level 1 meeting is basically a pre-scheduled conversation; informal, adaptive, and free flowing. New and small organizations may operate here, and that can be entirely appropriate.

Level 1 meetings rarely have an agenda or a clearly stated set of desired outcomes. Groups come together at the appointed time to "talk about" one or more topics. Individuals may or may not take notes, and no one looks for a follow-up report.

Meetings usually involve 5 or fewer people, and expectations around timeliness are lax. People arrive late, meetings run long, and meetings get rescheduled or canceled often.

When a meeting involving customers, investors, or other high-stakes participants come around, it's a big deal. These are special events that the team puts extra effort into planning, and which can cause significant anxiety. The agenda, presentations and planning for these meetings are treated as a one-off; they rarely result in models that the organization can use for future meetings.

WHEN LEVEL 1 WORKS

Level 1 meeting maturity can work if teams are small and either know each other well or all feel confident engaging in dialogue. Not coincidentally, these are also the conditions needed for an engaging conversation. Most startups and new clubs begin at a level 1. These groups operate officially enough that they know they should schedule "a meeting"—but they aren't yet so structured that they're ready to do more than just get together and talk.

This kind of free-wheeling approach puts faith in the church of emergence, trusting that the key insights and right decisions will emerge when you get people sharing ideas together. That faith is rewarded for some groups.

WHEN LEVEL 1 FAILS

Level 1 falls apart quickly and often. More than 4 people, more than a few hours spent in meetings that didn't accomplish anything, and someone will start looking for some structure. Organizations with experienced founders rarely operate at level 1 for many meetings. Level 1 also fails when it encounters the outside world.

Case in Point

For example, we often work with outside contractors and independent vendors, and I cringe when I find myself working with a Level 1 group. These well-meaning folks will book a meeting time. They don't say what the meeting will accomplish, who needs to be there, and often don't even say how long we can expect it to last.

At the appointed time, we'll get together and talk. This part is always pleasant enough. People talk until it feels like it's time to stop talking, and then they go their separate ways.

Then comes the most frustrating symptom of Level 1 "meeting" performance. Over the course of the next several days, we'll get a series of email and text messages all trying to establish what we decided in the meeting we just held and who's supposed to do what. It's like the meeting was simply a warm-up for the real work, all of which will manifest in dribbly fits and spurts over the course of many extra hours. I rarely recommend Level 1 vendors to others, which is too bad, because some of them are very skilled in their core offerings. They're just too inefficient and aggravating to work with.

Level 2 Organizations

Level 2
Repeatable

Many small businesses operate at a Level 2.

At first glance, a level 2 and a level 3 organization may look very similar. In both cases, many meetings have an agenda, and that agenda may be roughly the same from week to week for recurring meetings. After a meeting in a level 2 organization, the meeting leader may send out meeting notes by email. If they fail to do so, though, no one will really notice.

The distinction between a level 2 and a level 3 is this: *any structure you see in a level 2 organization is entirely dependent on the person running the meeting.* This means that project meetings in one group may work very differently from how they work in another group; it is left up to the individual project managers to decide how to run their updates. If the person leading these more mature meetings leaves or changes roles, the structure they used rarely survives more than one or two sessions following their departure.

In a Level 2 organization, individual contributors may have achieved meeting performance maturity, but this *performance is not owned by the organization*. The organization has not established a resilient meeting performance capability.

WHEN LEVEL 2 WORKS

Level 2 is the typical starting place for new organizations led by experienced founders. It is also the natural transition point for maturing organizations that decide to hire in their first managers (of any kind—product, program, project, and department level managers all bring some form of meeting structure to a group).

Level 2 works well for smaller organizations in transition. These groups have become too big or too busy to just wing it all the time, but they aren't yet stable enough to worry about process repeatability.

WHEN LEVEL 2 FAILS

Level 2 fails when organizations outgrow it. Obviously, Level 2 also fails in small organizations when the individuals with meeting skills leave. At around 20 to 25 people, a Level 2 organization starts to fall apart.

You'll see this 25-person tipping point referenced again and a again by business leadership and management experts.

Signs of an organization operating and suffering at a Level 2 include:

- A dramatic proliferation of meetings
- Wild variation in meeting quality: some have a clear purpose and results, many do not
- An increase in meeting anxiety across the organization:
    - People feel there are too many meetings, but don't feel they can skip one
    - People claim to hate all the meetings, but continue to schedule them as "the only way they can get anything done"
- Meeting dysfunction is rampant, especially multitasking during meetings and unbalanced participation, where one or two people do all the talking while everyone else sits back

The Level 1 and 2 Trap

Why do so many organizations get stuck at Level 1 or Level 2?

They get stuck because they misunderstand the function of meetings. Consider this 2015 quote from Stuart Butterfield, the CEO of Slack, a company that's rocketed from a small group of scrappy technologists to nearly 800 employees in a few short years.

> "People can go to work every day for a year and not really get anything done because they're just doing the things that they felt they were supposed to be doing. We just went through this process of canceling almost every recurring meeting that we had to see which ones we really needed. We probably do need some of the ones we canceled, and they'll come back — but we'll wait until we actually need them again."
>
> – *Stewart Butterfield, CEO Slack in an interview with the New York Times*

This approach to cancelling bad meetings reflects classic Level 2 thinking. The group at Slack understood that the meetings were occupying too much time, and that they were attending meetings out of unconscious habit. So they quit them cold turkey.

I heartily approve of canceling bad meetings, but I don't advocate this approach.

This is like recognizing you're eating too much and instead of modifying your diet, you go on a fast. Yes, a fast will keep you from eating for awhile, and you'll probably lose some weight. But waiting to see if you actually need food and then going with whatever you happen to grab in your starving desperation is not the way to successfully change eating habits. Instead of creating a healthy relationship with food, canceling all the meals and daring them to come back just leads to guilty eating and self loathing.

Organizations that operate with Level 3 meeting performance maturity and above understand that every meeting serves a specific purpose. When a more mature organization has a problem with too many meetings, they evaluate which of these meetings still serves a function, which have outlived their usefulness, and which need to be re-worked.

They may cancel lots of meetings, but they won't have to guess which ones need to stay.

Level 3 Organizations

Level 3
Defined

Larger and established organizations tend to operate at a Level 3 or above.

Meetings in a Level 3 organization have an understood function. The organization knows the difference between a status update, a decision making meeting, and a brainstorming session. Most meetings have an agenda of some kind, and people within the organization know what to expect from the different kinds of meetings.

Functional groups within a Level 3 organization may have adopted one or more formal meeting methodologies. Project Managers may be PMI certified, and use meetings to formally track risks, issues, and action items. Product groups may adopt Lean or Agile meeting rituals. Sales representatives will use call scripts and a pre-defined process for engaging with prospects.

While functional groups may use an established meeting methodology, internal teams, departments, and leadership teams usually do not. These internal discussions may have an regular meeting cadence, but rarely follow a purpose-built agenda.

Level 3 organizations encourage basic meeting education. They may establish a generic set of organizational "ground rules," such as always using an agenda, or starting meetings on time. These rules are inconsistently enforced, if at all. Any training primarily addresses meeting mechanics; Level 3 organizations have not yet established the meeting facilitation competency that enables them to successfully manage meeting dynamics.

Level 3 organizations do not have established feedback loops or mechanisms for reviewing meeting performance.

WHEN LEVEL 3 WORKS

Level 3 functions in most situations. For many internal meetings, Level 3 maturity is adequate. It's not necessarily that much fun, and the people within the organization may not understand how or why it works, but they get by.

An organization moving from Level 2 to Level 3 can see enormous productivity benefits and improvements to team morale. Transitioning from the relative chaos of Level 2 to having "a way" to make decisions, share information, and keep work on track clears roadblocks and reduces uncertainty. Knowing how and when a group will meet alleviates wasteful cognitive overhead and prevents valueless decision fatigue.

You can see examples of people getting the Level 3 religion in these books and articles:

- No agenda, no attenda!
- *Read This Before Our Next Meeting* by Al Pitimpalli
- *Meetings Suck: Turning One of The Most Loathed Elements of Business into One of the Most Valuable* by Cameron Herald

WHEN LEVEL 3 FAILS

Operating at a Level 3 fails when organizations mistake their adopted meeting standards as the point.

When a team follows a prescribed meeting agenda without understanding the underlying intention behind that meeting design, commitment and performance suffer. Meeting leaders may doggedly "stick to the script" to ensure they've checked off all the boxes, and lose sight of important changes in meeting context.

Because a Level 3 organization lacks mechanisms for monitoring and adjusting meeting practice, they become especially prone to "going through the motions" in a way that disengages employees and evokes the worst of bureaucracy. Worse still, as the world around them changes, they could find themselves sticking to a process that does more harm than good.

This perversion of purpose leads to the kind of backlash you see in these articles:

- More productive meetings? Ditch the agenda—10 benefits
  In which the team recognizes the way they were meeting was not serving their purpose
- How to Finally Kill the Useless, Recurring Meeting
  In which the author describes a company failing at Level 3 and transitioning to a Level 4

Level 4 Organizations

Level 4
Managed

The majority of meetings within a Level 4 organization have a clear purpose, an agenda, and result in published records.

A Level 4 organization maintains both prescriptive meeting standards dictating how certain meetings will flow, and a library of more general purpose meeting processes and techniques. Prescriptive standards are actively updated and revised over time, so while the process used may be strict for a given meeting, the process remains flexible and adaptive so it can be improved for future meetings.

Often a Level 4 organization will have this structure in place because they must. When you work in government, international standards development, or in other regulated, certified, and audited environments, there are rules to be followed and records to keep. There is never a question of whether to prepare an agenda, and leaders never need to threaten "no agenda, no attenda!" Instead, the question might be how far in advance that agenda needs to be published.

Training and education in a Level 4 organization includes meeting facilitation skills. People learn how to provide constructive criticism, how to respectfully listen and challenge, and how to encourage participation within a group. Meeting processes are designed to foster teamwork, engagement, and trust, as well as execute work deliverables.

Level 4 organizations may not have trained facilitators on staff, but they know what these professionals do and they make use of their services.

WHEN LEVEL 4 WORKS

Level 4 organizations treat meetings professionally. Most meetings achieve a useful result. If people feel a meeting isn't working well in a Level 4 organization, they are likely to look at how to improve or cancel that specific meeting rather than reacting against all the meetings in the organization.

When an organization operates at this level, the conversation changes. We see meetings discussed in context, and we see consultants offering more targeted advice. For example, instead of talking about *how* developers should meet (a Level 3 basic structure question), the discussion turns to developing Agile fluency (a Level 4 managed capability discussion).

WHEN LEVEL 4 FAILS

Organizations operating at a Level 4 risk becoming stale. Level 4 fails when groups stop questioning the process.

In our practice, we see Level 4 organizations that have become very comfortable with their meeting process. Meetings run smoothly, people know what to expect, and they achieve consistent results. These organizations also tend to have a fairly stable membership.

The problem they run into is stagnation. Everything works fine, so they stop looking around them to see what else they might try. And because the process they're using was created at a time and place with that core membership group, it gets rooted in a way that makes it hard for new people to join in.

If a Level 4 organization runs into problems with a meeting, they're mature enough to change the process and fix the problem. But if they don't have problems, the process gets rigid, increasing the risk that it will snap badly in the future.

Level 5 Organizations

Level 5
Optimized

Level 5 meeting performance maturity is pretty rare. An organization operating at Level 5 will have an established team of internal facilitators and a continuous improvement mindset with regards to meetings.

We see Level 5 meeting performance maturity in two places: in departments or teams within larger organizations, and in smaller organizations led by people who champion meeting maturity.

Case in Point

For example, the executive teams within high performing companies often operate at a Level 5. My partner John likes to tell stories about Intel under Andy Grove, the author of *High Output Management* and a close collaborator of Peter Drucker's, both of whom were huge advocates for effective meetings.

John remembers one especially vivid meeting where he had to present his team's project results to Andy and the exec team. His boss helped with the presentation, and then John's boss's boss coached them both to get the message right. John was expected to be clear, efficient, on-point, and relevant, and ready to engage in the follow-up discussion. What great training for a young engineer!

There was no question about whether a meeting with Andy Grove or anyone at the SVP level and above would be effective. This wasn't true of every group at Intel, but as a high performing meeting was the expected minimum bar at the executive levels, meeting performance became aspirational and common throughout the organization.

WHEN LEVEL 5 WORKS

Level 5 is the height of performance maturity, where the organization values meetings, understands how to use them, and continuously improves meeting practices to achieve consistently excellent results.

Level 5 performance matters more in some parts of the organization than in others. For most, the priority will be on achieving level 5 for leadership and board meetings, and next for high-stakes meetings involving external audiences such as sales calls and client project kickoffs.

For most groups, achieving Level 5 for every department and project status update isn't a priority. But for the groups that do, the resulting increases in productivity and well-being quickly justify the effort. Once the leadership group begins operating at a higher level of performance maturity, those practices become much easier to spread throughout the rest of the organization.

And really, who doesn't like consistently excellent results? We're seeing an increase in the number of companies with an internal facilitation team - a sure sign that the organization recognizes and invests in systematic support for effective meetings.

WHEN LEVEL 5 FAILS

Wait, what? This is our peak level maturity. How could that fail!?

It's certainly possible and easy for Level 5 performance to regress back to a less mature Level. Level 5 can fail to be Level 5 when support or investment wanes.

That said, I haven't seen enough organizations operating with Level 5 meeting performance maturity to have encountered one where consistently operating at Level 5 created problems. This is an ideal to which organizations aspire, and not often a vantage point from which they need to ponder what might go wrong.

If I were to speculate, though, I think a potential risk could be this.

Meetings are a tool. They're a useful, powerful, and important tool, and we need to mind how we use them, because a meeting's impact can be mighty.

But the meetings are never the point, and it's possible with Level 5 focus, an organization could be spending just a bit too much time paying attention to them.

What it Takes for Organizations to Change Levels

We like to think that organizations become more mature over time, but it is also possible for organizations to regress to lower levels of maturity as the people and systems in place change.

Some organizations fail to mature at all, because they lack the resources required. As this table shows, higher levels of performance maturity require increased investment.

Transition	Individual Led	Leadership Led	Systematic Support
Level 1 to 2	**Possible**	Desirable	
Level 2 to 3	Difficult	**Highly Desirable**	Desirable
Level 3 to 4		**Required**	**Required**
Level 4 to 5		**Required**	**Required**

Achieving meeting performance maturity of a Level 3 or above must be supported by those in charge.

Stories of Organizations in Transition

Moving from Level 2 to Level 3

I have seen a handful of companies try to move from Level 2 to Level 3 operations. They worked to define approaches for customer calls, for kicking off projects, and for running the internal program review meetings. Two of the three companies I watched failed because the CEO didn't support the effort and refused to participate in the new structure.

In the third company, the board fired the CEO and replaced him with someone who was ready to take the company to the next level. That company had a successful exit within the year.

Regressing from Level 3 to Level 2

I've also seen a group move from a solid Level 3 to a Level 2 after a leadership change. This group had an established history of structured meetings, clear roles, and documented results. When the new leader arrived, he declared that "we don't need all this structure!" and threw it all out, much to the confusion of the rest of the group.

It's not clear what the new leader found objectionable about the way those meetings worked. Maybe he felt that the structure was too binding, and it kept the group from really engaging. Maybe he didn't like the transparency and accountability the structure provided. Regardless of what the real issue was, his actions caused the group to regress to a Level 2. After he leaves, they will be whipped around to whatever the next leader wants, and their shared identity gets weaker. A Level 4 solution would have been to evolve the meeting structure to address the problems he saw with it, rather than going structure-free.

Operating at Level 4 and 5

Both Level 4 and Level 5 maturity require some kind of systemic support. Traditionally this takes the form of dedicated personnel to schedule, run, and document meetings. Increasingly, organizations use software to provide this support (this is part of what we sell, by the way.)

In my work with standards committees, which are composed primarily of volunteers, I have seen organizations slip from a Level 4 to a Level 3 when they lost funding for their centralized secretariat. In committee work, a secretariat staff ensures that all the meetings run consistently and produce reliable, standardized results regardless of which committee they support. (Much like the service our friends at Return Leverage provide for project teams.)

When the secretariat went away, each volunteer committee chair had to run their own meetings. Some could, and others flailed. Consistency vanished, and quality suffered at all but the highest levels. The top-level committees and board continued to operate well because their meetings ran according to rules set in the bylaws: a Level 3 enforcement that kept them functional.

By contrast, a decade or so ago the leadership team at ASTM determined that they wanted their organization to lead the industry by producing more standards at higher quality more rapidly than any other organization. They dramatically reduced the time it took for a new standard to get approval, in some cases shaving years off the total project time. They accomplished this in a large part through a concerted investment in running better committee meetings. They refined and locked the meeting structure, then put staff and technology in place to support the meetings.

Conclusion

Meeting well is a foundational capability organizations must develop to thrive.

There are a set of core meeting practices an organization should know and use to establish basic meeting competence. Every meeting involves people sharing information and creating shared meaning, and as such, every meeting must address the essential foibles inherent to human communication for shared meaning to emerge.

So there are basics. Rules not universally true, but truly useful.

After that, there's a vast array of good practices, novel techniques, and experimental approaches for achieving mastery in a variety of contexts. What works in one meeting does not necessarily work in another.

Organizations that achieve higher levels of meeting performance maturity go beyond the basics and become masters of how they engage with each other and the world around them. Meetings are a tool, and master craftsmanship is achievable.

Selected References and Resources

Original Blog Posts

These chapters were originally published as blog posts on the Lucid Meetings blog. The original posts include additional resources, including short videos, downloadable meeting templates, and supplemental content.

I invite you to visit our blog to see more, and to share your comments.

- Introduction: Creating A Foundation for Changing Your Organization's Meetings
  http://blog.lucidmeetings.com/blog/creating-a-foundation-for-changing-your-organizations-meetings
- Meeting Strategy: Why meet? Understanding the Function of Meetings in the Collaborative Workplace
  http://blog.lucidmeetings.com/blog/why-meet-understanding-the-function-of-meetings-in-the-collaborative-workplace
- Meeting Execution: The Underlying Structure of Meetings that Work
  http://blog.lucidmeetings.com/blog/meeting-execution-the-underlying-structure-of-meetings-that-work
- Meeting Cadence: How often should you meet? Selecting the right meeting cadence for your team
  http://blog.lucidmeetings.com/blog/how-often-should-you-meet-selecting-the-right-meeting-cadence-for-your-team
- Meeting Performance Maturity: How to evolve meeting performance across the organization
  http://blog.lucidmeetings.com/blog/meeting-performance-maturity-model

More from Lucid Meetings

Read more about meetings, download meeting agenda templates, and learn about our services on our website.

- Lucid Meetings Blog
  http://blog.lucidmeetings.com/blog/
- Meeting Agenda Templates and Facilitator's Guides
  https://www.lucidmeetings.com/templates/
- The Effective Meeting Results Program
  https://www.lucidmeetings.com/effective-meeting-results-program-overview
- The Lucid Meetings Software Platform
  https://www.lucidmeetings.com/features

LUCID

Reference Blog Posts and Articles

About Facilitation and Meetings in General

- Facilitation Skills Training Programs
  http://www.leadstrat.com/training/
- 5 Tips for Effective Team Meetings
  https://www.entrepreneur.com/article/272078
- Are Meetings Keystone Habits?
  https://dickaxe.cayenne.io/post/are-meetings-keystone-habits
- Facilitation impact awards | IAF World
  https://www.iaf-world.org/site/facilitators/impact
- How to Design an Agenda for an Effective Meeting
  https://hbr.org/2015/03/how-to-design-an-agenda-for-an-effective-meeting
- Tuesday's Master Facilitation Tip: Preparing from Leadership Strategies Blog
  http://www.leadstrat.com/blog/preparing/
- Stop the Meeting Madness
  https://hbr.org/2017/07/stop-the-meeting-madness.html
- ICA Associates
  http://www.ica-associates.ca/
- "No agenda, no attenda": Five hacks to avoid the unproductive-meeting trap | Financial Post
  http://business.financialpost.com/entrepreneur/fp-startups/hacks-to-help-you-avoid-the-unproductive-meeting-trap
- More productive meetings? Ditch the agenda ? 10 benefits | Jane Eldridge
  https://janeeldridge.wordpress.com/2014/11/10/more-productive-meetings-ditch-the-agenda-10-benefits/
- Increase Meeting Productivity: The Idea Parking Lot
  http://www.thedynamiccommunicator.com/increase-meeting-productivity-the-idea-parking-lot/
- E.L.M.O: How a Muppet Can Save Your Meetings….and Your Sanity!
  https://www.thepersimmongroup.com/e-l-m-o-how-a-muppet-can-save-your-meetings-and-your-sanity/
- Fist of five
  https://medium.com/101ideasforagileteams/fist-of-five-1dbaffa1e68d

About Specific Meetings and Meeting Cadence

- 7 Tips to Make Your Staff Meetings More Effective - Clear HR Consulting Inc.
  http://clearhrconsulting.com/blog/retention/7-tips-to-make-your-staff-meetings-more-effective/
- Agile Fluency Project: Chart Your Agile Pathway
  http://www.agilefluency.org/
- How long and how often should team meetings be? - ProjectConnections.com
  http://www.projectconnections.com/knowhow/burning-questions/new/team-meetings.html
- How Many Board Members Meeting How Often? | NON PROFIT EVOLUTION
  https://nonprofitevolution.wordpress.com/2013/12/17/how-many-board-members-meeting-how-often/
- 4.4 Frequency of Board Meetings | Early Stage Tech Boards
  http://earlystagetechboards.com/4-4-frequency-of-board-meetings
- Board of Directors: Number of Meetings - Feld Thoughts
  http://www.feld.com/archives/2006/09/board-of-directors-number-of-meetings.html

- Cadence: An Important Tool for Maintaining Leadership Team Alignment
http://www.relationship-impact.com/blog/2015/09/cadence-an-important-tool-for-maintaining-leadership-team-alignment/
- For Content Marketing Success, Meet More Often
http://www.fronetics.com/content-marketing-success-meet-more-often/
- Four Agile Ceremonies, Demystified by The Agile Coach
https://www.atlassian.com/agile/ceremonies
- Frequency of meetings
http://www.hse.gov.uk/involvement/frequency.htm
- Getting the Most From Your Startup's Board of Directors
https://www.entrepreneur.com/article/233258
- Issue 3 Article 1 - Key Considerations in Board Meeting Frequency
http://www.boardworksinternational.com/2010june_article1.html
- Meeting at the right time and frequency
http://www.boardpad.com/blog/meeting-right-time-frequency/
- EOS Worldwide Blog | Tips & Advice for Entrepreneurs and Leaders of Growing Companies | Meetings
https://blog.eosworldwide.com/blog/topic/meetings
- How often do you hold 1:1 meetings with your employees? – Quora
https://www.quora.com/How-often-do-you-hold-1-1-meetings-with-your-employees
- How often should I have progress meetings?
https://www.lynda.com/Business-Skills-tutorials/How-often-should-I-have-progress-meetings/175639/380470-4.html
- How often should sales and marketing meet? - Heinz Marketing
http://www.heinzmarketing.com/2011/03/how-often-should-sales-and-marketing-meet/
- How Often Should You Contact Clients?
http://www.investopedia.com/financial-edge/1012/how-often-should-you-contact-clients.aspx
- How Often Should Your Sales Team Meet? | Describeit :: Landscape Business In A Box
http://www.describeit.com/how-often-should-your-sales-team-meet/
- How to Finally Kill the Useless, Recurring Meeting
https://hbr.org/2015/03/how-to-finally-kill-the-useless-recurring-meeting
- How To Run A Staff Meeting - Business Insider
http://www.businessinsider.com/how-to-run-a-staff-meeting-2011-6
- How We Plan Remote Work Retreats For Our Growing Team
https://open.buffer.com/remote-work-retreats/
- In startups, how often should you have all hands team meetings? – Quora
https://www.quora.com/In-startups-how-often-should-you-have-all-hands-team-meetings
- Inspired Company Meetings Will Energize Employees
https://www.entrepreneur.com/article/250012
- One-On-One Meetings
https://www.sans.edu/cyber-research/management-laboratory/article/oneonone-meetings
- Project Manager Tips: How Often Meetings Are Necessary
http://www.brighthubpm.com/monitoring-projects/114399-how-often-should-your-project-team-meet-different-views-and-perspectives/
- The Daily Meeting (PDF)
https://www.gazelles.com/columns/Daily_Meeting.pdf

- Video: Effective Meetings: Level 10 Meeting for Entrepreneurial Leadership Teams
https://www.youtube.com/watch?v=HmV6_fH5NkU
- Consensus Workshop Method PDF
http://www.ica-uk.org.uk/images/stories/mgilbraith/ToP_method_overviews/ToP_method_overview_-_CW.pdf
- The Power of the Quarterly Business Review – QBR
http://www.gainsight.com/customer-success-best-practices/quarterly-business-review-qbr/

About Business, Teams, and Collaboration

- Capability Maturity Model – Wikipedia
https://en.wikipedia.org/wiki/Capability_Maturity_Model
- Stop Using the Excuse "Organizational Change Is Hard"
https://hbr.org/2017/07/stop-using-the-excuse-organizational-change-is-hard
- The four building blocks of change | McKinsey & Company
http://www.mckinsey.com/business-functions/organization/our-insights/the-four-building-blocks--of-change
- What Google Learned From Its Quest to Build the Perfect Team - The New York Times
https://www.nytimes.com/2016/02/28/magazine/what-google-learned-from-its-quest-to-build-the-perfect-team.html
- Company Growth: Why everything breaks at 25 employees
https://getlighthouse.com/blog/company-growth-everything-breaks-25-employees/
- Defend Your Research: Effective Managers Say the Same Thing Twice (or More)
https://hbr.org/2011/05/defend-your-research-effective-managers-say-the-same-thing-twice-or-more
- Stewart Butterfield of Slack: Is Empathy on Your Résumé - The New York Times
https://www.nytimes.com/2015/07/12/business/stewart-butterfield-of-slack-experience-with-empathy-required.html
- Gore: Our Beliefs & Principles
https://www.gore.com/about/our-beliefs-and-principles
- How the Mighty Fall: A Primer on the Warning Signs
https://www.bloomberg.com/news/articles/2009-05-14/how-the-mighty-fall-a-primer-on-the-warning-signs
- The "Waterline" Management Concept
https://www.linkedin.com/pulse/waterline-management-concept-ryan-titmas
- Is Your Team Too Big? Too Small? What's the Right Number?
http://knowledge.wharton.upenn.edu/article/is-your-team-too-big-too-small-whats-the-right-number-2/
- The Toyota Way
https://en.wikipedia.org/wiki/The_Toyota_Way/
- Jeff Bezo's Annual Letter to Amazon Shareholders
https://www.sec.gov/Archives/edgar/data/1018724/000119312517120198/d373368dex991.htm

About Decision Making and Productivity

- Deep Habits: The Importance of Planning Every Minute of Your Work Day - Study Hacks - Cal Newport
http://calnewport.com/blog/2013/12/21/deep-habits-the-importance-of-planning-every-minute-of-your-work-day/
- Do You Suffer From Decision Fatigue? - The New York Times
http://www.nytimes.com/2011/08/21/magazine/do-you-suffer-from-decision-fatigue.html
- A Focus on Distraction - The New York Times
http://www.nytimes.com/2013/05/05/opinion/sunday/a-focus-on-distraction.html
- Social media use can contribute to anxiety and depression - Business Insider
http://www.businessinsider.com/social-media-use-can-contribute-to-anxiety-and-depression-2015-6

- Turning Off Email, Turning Up Productivity – Workforce Magazine
  http://www.workforce.com/2012/02/29/turning-off-email-turning-up-productivity/
- Video: The Cynefin Framework
  https://www.youtube.com/watch?v=N7oz366X0-8&t=3s
- A Brief History of Decision Making
  https://hbr.org/2006/01/a-brief-history-of-decision-making
- How Only Being Able to Use Logic to Make Decisions Destroyed a Man's Life
  http://nymag.com/scienceofus/2016/06/how-only-using-logic-destroyed-a-man.html
- How The Most Common Emotions Affect Business Decision Making And What To Do About It
  https://www.forbes.com/sites/eriklarson/2017/03/21/how-common-emotions-affect-team-decision-making-and-what-to-do-about-it/#e40156f28960
- Brain Scanners Can See Your Decisions Before You Make Them
  https://www.wired.com/2008/04/mind-decision/
- Unconscious decisions in the brain
  https://www.mpg.de/research/unconscious-decisions-in-the-brain
- Phantom Limbs
  http://www.radiolab.org/story/91525-phantom-limbs/
- The Brain "Sees" Objects That You Don't Perceive
  http://www.spring.org.uk/2013/11/the-brain-sees-objects-that-you-dont-perceive.php
- Why Even Radiologists Can Miss A Gorilla Hiding In Plain Sight
  http://www.npr.org/sections/health-shots/2013/02/11/171409656/why-even-radiologists-can-miss-a-gorilla-hiding-in-plain-sight
- Cognitive bias cheat sheet
  https://betterhumans.coach.me/cognitive-bias-cheat-sheet-55a472476b18
- Groupthink: The brainstorming myth.
  http://www.newyorker.com/magazine/2012/01/30/groupthink
- The Cognitive Bias That Destroys Your Ability to Correctly Predict the Future
  https://www.inc.com/jason-hreha/the-cognitive-bias-that-destroys-your-ability-to-correctly-predict-the-future.html
- How to Make Sense of Weak Signals
  http://sloanreview.mit.edu/article/how-to-make-sense-of-weak-signals/
- This study tried to improve our ability to predict major geopolitical events. It worked.
  http://www.vox.com/2015/8/20/9179657/tetlock-forecasting
- Video: The Struggle Between Speed and Accuracy
  https://vimeo.com/194554848
- The Morning Routines Of The Most Successful People
  https://www.fastcompany.com/3033652/the-morning-routines-of-the-most-successful-people
- A 26-year-old time-management strategy can help you become more productive and less stressed at work
  http://www.businessinsider.com/how-to-use-stephen-coveys-time-management-matrix-2015-12
- Checklist for Making Faster, Better Decisions
  https://hbr.org/2016/03/a-checklist-for-making-faster-better-decisions
- List of fallacies
  https://en.wikipedia.org/wiki/List_of_fallacies
- thou shalt not commit logical fallacies (poster)
  https://yourlogicalfallacyis.com/

- Deciding How to Decide
  https://hbr.org/2013/11/deciding-how-to-decide
- Monte Carlo Simulation
  —
- Scenario Analysis
  https://rapidbi.com/scenario-analysis/
- Delphi Method
  http://www.rand.org/topics/delphi-method.html
- A Leader's Framework for Decision Making
  https://hbr.org/2007/11/a-leaders-framework-for-decision-making
- Self-Consistency
  http://www.wheelofpersuasion.com/technique/self-consistency/
- Timeboxing: Maximizing Your Productivity
  https://www.mindtools.com/pages/article/timeboxing.htm
- The Art of Getting to Yes: 5 Techniques for Building Consensus
  http://www.leadstrat.com/blog/the-art-of-getting-to-yes-5-techniques-for-building-consensus-2/
- Basic Guidelines to Reframing — to Seeing Things Differently
  http://managementhelp.org/blogs/personal-and-professional-coaching/2012/02/02/basic-guidelines-to-reframing-to-seeing-things-differently/
- Three Ways To Reframe A Problem To Find An Innovative Solution
  https://www.fastcompany.com/3050265/three-ways-to-reframe-a-problem-to-find-innovative-solution
- The Dandelion Question
  https://www.dropbox.com/s/f7qsxbccq8pq2cx/The%20dandelion%20question.pdf?dl=0
- Consensus Guidelines: Practical Approaches to Consensus Decisions
  http://www.meetingforresults.com/wp-content/uploads/2012/01/Consensus_Guidelines.pdf
- The Innovate Step - Generating a robust set of decision alternatives
  http://www.decision-making-solutions.com/decision-alternatives.html
- Gradients of Agreement can help move groups forward
  http://msue.anr.msu.edu/news/gradients_of_agreement_can_help_move_groups_forward
- Decision Dilemma #6: Lack of Techniques to Overcome Blocks to Agreement
  https://books.google.com/books?id=wU6Dw19Sue4C&pg=PA61#v=onepage&q&f=false
- Learning with Fist of Five Voting
  http://agileforall.com/learning-with-fist-of-five-voting/
- 'Infomania' worse than marijuana
  http://news.bbc.co.uk/2/hi/uk_news/4471607.stm

Books

About Business Meetings

- *Death by Meeting: A Leadership Fable...About Solving the Most Painful Problem in Business* by Patrick Lencioni
  https://smile.amazon.com/Death-Meeting-Leadership-Solving-Business/dp/0787968056
- *Read This Before Our Next Meeting* by Al Pittampall
  https://smile.amazon.com/Read-This-Before-Next-Meeting/dp/1936719169

- *Meetings Suck: Turning One of The Most Loathed Elements of Business into One of the Most Valuable* by Cameron Herold
https://smile.amazon.com/Meetings-Suck-Elements-Business-Valuable/dp/1619614146
- *Let's Stop Meeting Like This: Tools to Save Time and Get More Done* by Dick Axelrod, Emily Axelrod
https://smile.amazon.com/Lets-Stop-Meeting-Like-This/dp/1626560811
- *Meetings Matter: 8 Powerful Strategies for Remarkable Conversations* by Paul Axtell
https://smile.amazon.com/Meetings-Matter-Strategies-Remarkable-Conversations/dp/0943097142

About Meeting Design and Facilitation

- *Facilitator's Guide to Participatory Decision Making* by Sam Kaner
https://smile.amazon.com/Facilitators-Participatory-Decision-Making-Jossey-Bass-Management/dp/1118404955
- *The Secrets of Facilitation: The SMART Guide to Getting Results with Groups* by Michael Wilkinson
https://smile.amazon.com/Secrets-Facilitation-Getting-Results-Groups/dp/1118206134/
- *Leading Great Meetings: How to Structure Yours for Success* by Richard M Lent Ph.D.
https://smile.amazon.com/Leading-Great-Meetings-Structure-Success/dp/0692446001/
- *Facilitating with Ease! Core Skills for Facilitators, Team Leaders and Members, Managers, Consultants, and Trainers* by Ingrid Bens
- https://smile.amazon.com/Facilitating-Facilitators-Managers-Consultants-Trainers/dp/1118107748
- *Advanced Facilitation Strategies: Tools and Techniques to Master Difficult Situations* by Ingrid Bens
- https://smile.amazon.com/Advanced-Facilitation-Strategies-Techniques-Situations/dp/0787977306/
- *Robert's Rules of Order Newly Revised 11th Edition* by Henry M. Robert III
https://smile.amazon.com/Roberts-Rules-Order-Newly-Revised/dp/030682020X
- *Gamestorming: A Playbook for Innovators, Rulebreakers, and Changemakers* by Dave Gray, Sunni Brown, James Macanufo
- https://smile.amazon.com/Gamestorming-Playbook-Innovators-Rulebreakers-Changemakers/dp/0596804172
- eBook*: 10 Principles of Facilitation*
http://www.leadstrat.com/downloads/free-ebook-10-principles-of-facilitation/

About Business and Productivity

- *Peak: Secrets from the New Science of Expertise* by Anders Ericsson, Robert Pool
https://smile.amazon.com/Peak-Secrets-New-Science-Expertise-ebook/dp/B011H56MKS
- *Scaling Up: How a Few Companies Make It...and Why the Rest Don't (Rockefeller Habits 2.0)* by Verne Harnish
https://smile.amazon.com/Scaling-Up-Companies-Rockefeller-Habits/dp/0986019526
- *Terms of Engagement: New Ways of Leading and Changing Organizations* by Richard H Axelrod, Peter Block
https://smile.amazon.com/Terms-Engagement-Leading-Changing-Organizations/dp/1605094471
- *The Power of Habit* by Charles Duhigg
http://charlesduhigg.com/the-power-of-habit/
- *Traction: Get a Grip on Your Business* by Gino Wickman
https://smile.amazon.com/Traction-Get-Grip-Your-Business/dp/1936661837
- *The Knowledge Illusion* by Steven Sloman and Philip Fernbach
https://smile.amazon.com/gp/product/1509813071?pldnSite=1
- *Influence: The Psychology of Persuasion* by Robert B. Cialdini
https://smile.amazon.com/Influence-Psychology-Persuasion-Robert-Cialdini/dp/006124189X
- *Getting Things Done* by David Allen
http://gettingthingsdone.com/

- *Deep Work* by Cal Newport
  http://calnewport.com/books/deep-work/
- *High Output Management* by Andrew S. Grove
  https://smile.amazon.com/High-Output-Management-Andrew-Grove/dp/0679762884
- *The Effective Executive: The Definitive Guide to Getting the Right Things Done* by Peter Drucker
  https://smile.amazon.com/Effective-Executive-Definitive-Harperbusiness-Essentials/dp/0060833459/
- *Transforming the Mature Information Technology Organization* by Robert A. Zawacki
  https://smile.amazon.com/gp/product/0964691000

Surveys, Research and Academic Publications

- *The Cambridge Handbook of Meeting Science (Cambridge Handbooks in Psychology)* Joseph A. Allen, Nale Lehmann-Willenbrock, Steven G. Rogelberg
  https://smile.amazon.com/Cambridge-Handbook-Meeting-Handbooks-Psychology/dp/1107067189
- Meetings matter: Effects of work group communication on organizational success
  https://www.researchgate.net/publication/224133858_Meetings_matter_Effects_of_work_group_communication_on_organizational_success
- The Benefit of Power Posing Before a High-Stakes Social Evaluation
  https://dash.harvard.edu/handle/1/9547823
- The invisible gorilla strikes again: Sustained inattentional blindness in expert observers
  https://www.ncbi.nlm.nih.gov/pmc/articles/PMC3964612/
- Constructive memory: past and future
  https://www.ncbi.nlm.nih.gov/pmc/articles/PMC3341652/
- The Science and Fiction of Meetings
  https://www.researchgate.net/publication/265508855_The_Science_and_Fiction_of_Meetings
- Meetings in America by infocom for Verizon
  https://e-meetings.verizonbusiness.com/global/en/meetingsinamerica/uswhitepaper.php
- 2005 Microsoft Office Personal Productivity Challenge (PPC)
  http://mrb.lynkx-01.nl/Uploads/Files/exec%20summ%20Global%20Productivity%20Study%202-14-05.pdf
- Meeting Analysis: Findings from Research and Practice
  http://www.okstate.edu/ceat/msetm/courses/etm5221/Week%201%20Challenges/Meeting%20Analysis%20Findings%20from%20Research%20and%20Practice.pdf
- The Meeting Behavior Survey by Fuze
  http://blog.fuze.com/fuze-survey-reveals-u-s-workforce-hampered-by-multitasking-and-disengagement/
- Collaboration 2.0: Death of the Web Conference (As We Know It) by Ovum
  http://solutions.join.me/collaboration_study
- A Profile of Meetings In Corporate America: Results of the 3M Meeting Effectiveness Study
  http://ceo.usc.edu/working_paper/a_profile_of_meetings_in_corpo.html
- 2015 State of Enterprise Work Report by WorkFront
  http://www.workfront.com/enterprise/resource/ebook/state-enterprise-work-report-2015/
- Disruption and Recovery of Computing Tasks: Field Study, Analysis, and Directions
  http://research.microsoft.com/en-us/um/people/horvitz/chi_2007_iqbal_horvitz.pdf
- The cost of not paying attention: How interruptions impact knowledge worker productivity
  http://www.brigidschulte.com/wp-content/uploads/2014/02/costofnotpayingattention.basexreport-2.pdf

Thank you for previewing Part 1 of *The Lucid Guide to High-Performance Meetings*

In the forthcoming sections, we'll look at how to assess your organization's meetings and create a plan for improving meeting performance. We'll also share the core meeting techniques and meeting templates every organization should master. In the meantime, we welcome your feedback, questions, and ideas!

Share your comments on our blog at:
http://blog.lucidmeetings.com/blog/sneak-peek-the-lucid-guide-to-high-performance-meetings

Or send email directly to the author at: elise@lucidmeetings.com

LUCID