

Conducting a Well-managed Meeting



Les MacLeod, EdD, MPH, FACHE, is a professor of health management & policy at the University of New Hampshire in Durham, New Hampshire.

Well over a quarter century ago (1976) sociologist, Antony Jay published an article entitled “How to Run a Meeting,” which has since become a *Harvard Business Review* classic.

The article focused on a variety of factors known to inhibit productive meetings. It also outlined specific prescriptive actions that would improve meeting outcomes. Since that time, the number of meetings taking place has grown dramatically, as has the proliferation of improved communication technologies.

Yet surprisingly enough, there has been little evidence that meeting productivity has changed. Most research, in fact, indicates that the amount of time wasted in meetings has remained obstinately constant at somewhere between 30 and 60 percent. The primary reason for this is that most meeting chairs are seemingly unaware of their deficiencies in this area and have made few efforts to improve their skills.

Today’s practicing physicians are typically bright, high-energy, focused and, above all, time-conscious. These are precisely the traits and disciplines that have enabled them to get through the rigors of their medical school and residency training.

The hectic pace of today’s busy schedules demands these same kinds of attributes. Time continues to be a most guarded resource, and asking physicians to attend a meeting that limps along without clear direction or material results is a prescription for disaster.

A 50 percent productivity return is simply out of the question. So when asking colleagues to attend meetings for which you are administratively responsible, appreciating the difference between simply running a meeting and

actively managing one can be pivotal.

Meetings, in general, have earned a bad reputation. Initial expectations are typically modest at best and cynical at worst. Ironically, this common perception offers an exceptional opportunity to make lasting positive impressions.

A crisp, productive meeting will undoubtedly get noticed as a welcome departure from the norm. On the other hand, a drawn out, unproductive meeting will only confirm the notion that meetings are not a good use of physician time and should be avoided whenever possible. Changing this perception is not difficult, adds tangible value, and is well worth the effort.

What needs to get done?

Meeting outcomes are a leadership responsibility and need to be actively managed. First and foremost, there should be a clearly intended purpose, otherwise the meeting’s value will be impossible to measure. As simple as this might sound, the lack of a clear purpose is often overlooked and is usually the main reason for generating only marginal productivity.

The cost of a meeting is clear. It’s the amount of time spent multiplied by its value for each of the participants. For busy clinicians, this value is always high and typically gets translated in terms of opportunity cost, i.e., the value of what they could have been doing. Attendees will estimate the return on investment, in one way or another, and it is up to you to make sure that it’s positive.

Why hold a meeting?

Are there other less time-consuming alternatives that would accomplish the intended purpose just as well? Is the transference of information basically one-way, or is interaction and input from multiple sources required?

Will available telecommunications technology such as phone or video conferencing obviate the need for physical presence? What would be the consequences, political or otherwise, of not holding a meeting?



Who needs to attend?

The most productive meetings tend to involve between six and 12 people. Fewer than six limits the extent of member input while greater than 12 dilutes a sense of personal involvement.

While busy people are seldom upset if no meeting is called, that is not always the case when a meeting has been called and they haven't been invited. Meetings are often viewed just as much as status arenas as they are forums for discussion; however, giving in to social posturing should be resisted.

Everyone present should be there for a reason, otherwise "agenda drift" is much more likely. As far as possible, invited participants should be able to work together effectively. If decisions are to be made, those who

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have the power to make decisions need to be present. It is also appropriate to ask individuals to attend only that part of the meeting for which they are needed.

Where should meetings be held?

Attendee convenience is key when deciding where a meeting should be held. If there is significant travel time involved, phone or video conferencing should be serious considerations.

Physical facilities should be conducive to establishing a participative environment. The room should be supplied with required visual aids, whiteboards, flip charts, etc., along with an easily visible clock, when pos-

sible. Seating should be arranged to promote face-to-face discussions as well as to enable a clear view of any notes or illustrations that are made.

When should meetings be held?

Monday mornings and Friday afternoons are generally not good times. Early mornings with a light breakfast, late afternoons following office hours, or a noon luncheon are usually more convenient.

Breakfast can be scheduled a half hour prior to a morning meeting; a buffet can serve as a working lunch. The length of a late afternoon session needs to be mindful of typical evening obligations.

Meetings should be scheduled well in advance, with sufficient lead time for participants to satisfy any pre-meeting preparation requirements

How should meetings be managed?

Depending on the nature of what has to get done, the personalities of the various attendees, and the available timeframe, the style required for managing the meeting efficiently can range anywhere from completely democratic to being decidedly more directive.

The most effective style, in fact, might well vary from one agenda item to another. Whichever the case, the styles adopted are an integral part of the “art” of meeting management.

Each situation has to be “read” and responded to as appropriate. In most instances it is preferable to start with a less directive approach, becoming progressively more directive as each situation requires

Before the meeting

Strategically planned agenda

The agenda drives the meeting. If a meeting is worth having, it is worthy of having a planned, content-rich agenda. It is the essential roadmap for keeping things on track. More importantly, it is the one opportunity beforehand for formulating a careful strategy for the best way to accomplish what needs to be accomplished.

Length of meeting

Physician meetings that last more than an hour and a half will generally not be well-received. The agenda needs to be realistic in terms of what can actually be achieved within a given timeframe.

One useful tool is the bell-shaped agenda. A series of brief non-controversial items are listed first, more important and time-consuming items in order of priority take up the middle, and good-news and hopefully unifying items close out the agenda.

Each topic should be listed in results-oriented language that indicates what is needed for closure. Time limits can be assigned to each item. Another useful procedure is to indicate whether each item has been listed for information (I), discussion (D), action (A), or vote (V).

It is generally wise not to mix operational with strategic issues, since the latter tend to be more deliberative with additional preparation and process requirements. It is usually best to address a strategic issue as a single-item agenda.

Pre-meeting communications

The agenda should be sent out several days in advance, along with the date, time, and specific location. If it is sent out too far in advance it runs the risk of diminished priority; if it is sent out not far enough in advance, there is insufficient time for preparation.

Along with the agenda should be a brief cover letter that clearly indicates the purpose of the meeting along with its expected outcomes. There should be a statement regarding any advanced preparation requirements, as well a brief comment about any pre-assigned attendee responsibilities. Pertinent background materials should also be included.

This is also a good opportunity to let attendees know that the meeting will start and end on time, and that pre-meeting preparation on everyone’s part will help make it happen. A reminder notice or email should be sent out a few days in advance of the meeting that includes an attendance confirmation request

Pre-meeting logistics

Inadequate logistics are both embarrassing and dysfunctional. It conveys an impression that the meeting is not important enough to warrant careful planning. Logistical considerations are fairly straightforward:

- Is the meeting room large enough?
- Is there adequate seating?
- Are there appropriate visual aids and writing materials?
- Are the acoustics reasonable?
- Is the lighting, temperature, and ventilation adequate?
- Is the audio-visual and communication equipment in good working order?
- Have arrangements for refreshments been made?

It is important that these considerations be addressed well in advance and not take up valuable meeting time. Failure to do so will get the meeting off to a bad start.

Pre-meeting reception

Arrive at the meeting room a half hour or so in advance. This provides an opportunity for a last-minute check on the logistics. If there are problems, there is a good chance they can be resolved prior to the scheduled start.

It is always wise to bring extra copies of the agenda, handouts, and any pre-meeting meeting materials that were sent out. It will avoid awkward situations where materials have to be shared or passed around the room. Early arrival also affords an opportunity to greet each of the attendee individually and to set a collegial tone.

During the meeting

Opening the meeting

Meetings need to start on time. Not doing so sends a message that it is okay to be late. If there are late arrivals, do not take time to review what has already taken place. It wastes the time of the majority who were there on time.

Make clear at the outset the purpose and expectations of the meeting,

emphasizing a shared responsibility for productivity. Briefly review the agenda, commenting if necessary on items that require confidentiality, action, or votes. Open with enthusiasm and congeniality; both tend to be contagious, help to relieve tension, and set the tone for a relaxed and productive atmosphere.

A sense of humor can also be helpful when the subject matter warrants, provided it is used with tact. Keep in mind that a key meeting function is to leverage talent. A non-defensive, collegial atmosphere goes a long way in promoting member synergy.

Guiding the process

The importance of active listening cannot be overstated. It signals cues for needed process adjustments. Stick to the agenda and keep it moving. Avoid “analysis paralysis,” by keeping the discussions focused and on track. Tangential issues can be assigned to an “issues-bin” for later consideration.

Focus on solutions over symptoms and decisions over discussions. Consider an 80-20 rule whereby at least 80 percent of the time is devoted to resolving issues and less than 20 percent on discussing them. When necessary, help to interpret, clarify and synthesize the discussions.

A problem well-stated is often half-solved. To avoid possible misinterpretations, commit problem definitions to writing. Do the same for agreed-upon solutions. Know how to disagree without being disagreeable; how to use patience and tact without alienating. Reserve your own opinions until others have had an opportunity to express theirs. Avoid any temptation to manipulate. Smart people know when they are being manipulated and will resent it.

Summarize periodically and facilitate consensus when required. Meeting memory can be pivotal, so make sure to document the proceedings. The minutes should clearly

indicate any decisions made, along with specific future assignments and due dates. Record facts as opposed to opinions and include only such information as can withstand public and/or legal scrutiny.

Dealing with unproductive behavior

Common barriers to productive meetings include: talkative, silent, and negative participants; multiple and/or sidebar conversations; inattentiveness and multitasking; dominant and confrontational personalities; hidden agendas and “axes to grind;” digression and re-hashing.


Overcoming such obstacles requires a variety of interpersonal and facilitating skills. Establishing meeting norms, early on, will avoid many of these distractions. Depersonalizing issues helps to elevate discussions and to avoid unnecessary confrontations.

Challenging positions as opposed to individuals lessens the risk of “group think” as well as renders the interactions less defensive.

Diplomatically moving the discussion from one participant to another promotes involvement, and helps to control the garrulous. Members will be much more likely to support decisions or solutions in which they have actively participated.

Closing the meeting

Meetings need to end on time. People are sure to have other commitments and it is distracting to have some members looking at their watches or others simply getting up and leaving. If you find yourself in the middle of an agenda item when it is time to end, either announce that the item will be carried over as unfinished business or seek consensus for briefly extending the end-time.

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Make sure to allow sufficient time for a summary of the meeting, what was actually accomplished and what is to happen next. Specific actions and follow-up responsibilities should be clearly stated along with their due dates. The time and place of the next meeting should be fixed while members are still present.

After the meeting

Conducting post-meeting follow-up

Appropriate follow-up, though often neglected, is just as important as any other part of the meeting. Distribute the minutes promptly. Include the names of those attending as well as those not attending, and ask for corrections.

Thank the attendees for their participation and make sure that everyone is clear about what is going

to happen next. If action steps have been agreed upon, make sure that they happen. Sustained momentum will carry over to subsequent meetings, as will the loss of momentum. It is much harder to re-energize momentum than it is to sustain it.

Developing an evaluation mechanism

This is an essential final step that provides an informational loop back to the planning phase. The data collected, whether formally or informally, are used to make needed adjustments to future meetings. It also sends a clear message that participant input is valued and that continual improvement is part of your management process.

The more prompt and consistent the follow-up, the greater will be the

level of respect and attention from the participants. The responses will also be helpful in determining the meeting's overall cost-benefit.

Putting it all together

Your colleagues are busy people doing important things. Their time is one of their most important resources. Using their time efficiently demonstrates the effectiveness of your administrative skills as well as a respect for their valuable time. It will send a refreshingly positive message.

Key pre-meeting considerations include a clear purpose, the right people, adequate preparation, a strategic agenda, interpersonal and facilitating skills, balanced thinking, good record keeping, and appropriate follow-up.

Meetings are not an ends in themselves, but they can be a useful means of achieving desired ends.

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They should not simply be run—they should be actively managed. To be efficient, they require taking the time to hone interpersonal, teambuilding, and time management skills. To be effective they require prior planning, intentionality, and a results-oriented management process.

Taken together, these efforts will better enable physician executives to make optimum use of the time spent together with colleagues. The main principles are not difficult to learn and apply. With a little practice, they will become routine elements in consistently convening meetings that really matter.



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