CRAFT AGENDAS

SALVAGE BAD MEETINGS

Guide to Making Every Meeting Matter

TAME TROUBLEMAKERS

FOLLOW-UP EFFECTIVELY

Harvard Business Review

Guide to Making Every Meeting Matter

Meetings. They hold such promise for moving your business forward but are rarely executed well. We all know what we're supposed to do to run meetings effectively, but we seldom do them. Why? Perhaps we think it's just not worth the time to clarify what we hope to accomplish, craft an agenda, handpick participants, issue pre-work, and send out notes with key decisions and next steps.

But meeting preparation and follow-up is time well spent. This guide offers tips to make your meetings easier to prepare for, more enjoyable to run—and more productive. In time, these steps will become so ingrained you won't be able to imagine running meetings any other way. Your team—and your entire organization—will thank you for it.

You'll learn how to:

- Determine if you need to meet
- Manage basic meeting prep
- Develop a reputation for running great meetings
- Infuse new energy into meetings by removing some chairs, banning mobile devices, and booking 20- or 50-minute slots
- Orchestrate group decision making
- Prevent implementation roadblocks by giving all participants a voice
- Get the most out of web- and phone-conferencing tools
- Corral chronic latecomers and quiet windbags
- Make it safe to discuss the elephant in the room

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- Jump into the conversation—with grace
- Rescue meetings from hell, even if you're not the facilitator
- Keep the momentum going with prompt meeting follow-up

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Introduction

by Ron Ashkenas

For most of us in organizations, planning, running, and attending meetings should come as naturally as breathing. After all, much of an organization's work is done through meetings in which groups of various sizes get together to share information, solve problems, plan projects, review performance, make decisions, or align interests. Given this central role, one would think that effective meetings would be the norm.

Unfortunately, the meeting experience for many of us is quite different. Instead of seeing meetings as a way to get things done, we may see them as a "necessary evil" at best and a "waste of time" at worst. In some companies, managers feel that the meeting culture actually *reduces* their productivity and prevents them from spending time with customers and their own people.

Of course not every organization has such a dysfunctional meeting culture—but very few hit the mark, either. The irony is that we know what it takes to have a good meeting, whether it's face-to-face or virtual; with a small group or a large one: have a clear purpose, invite the right people, distribute pre-work early, set an agenda and stick to it, manage interpersonal dynamics, and send out notes and action items promptly following the meeting.

These guidelines are, for the most part, common sense, but we frequently ignore them altogether. Why? Because planning and running a good meeting takes time and discipline, which, for most of us, are in short supply. So more often than not, we plan meetings on the fly. We ask an assistant to coordinate calendars and figure that we can sketch out the agenda when we get there.

But it doesn't have to be this way. It *is* possible to hold effective meetings and to make that the norm in your company. This guide does not contain any magic formulas. Effective meetings require preparation and consideration. But if you are determined to make your meetings more productive, the suggestions in this guide will help make the process easier. It will also make the meetings themselves more fun, exciting, and rewarding, which will lessen everyone's anxiety. Soon you'll get a taste of success—a meeting that not only accomplishes your objectives but also leaves you and your colleagues energized. In time, these kinds of meetings will become the norm instead of the exception—and you won't be able to imagine going to a meeting that is not geared for success.

Ron Ashkenas is a senior partner with Schaffer Consulting and the author of *Simply Effective: How to Cut Through Complexity in Your Organization and Get Things Done.*

How to Run an Effective Meeting: The Basics

by Martha Craumer

Meetings have become a popular target of corporate jokes, too often viewed simply as napping opportunities. But "productive meeting" doesn't have to be an oxymoron.

Here's how to make sure that your meetings generate accolades—and useful output—instead of yawns and muttered curses.

Analyze your purpose and set clear objectives. Start by understanding why you want to have a meeting at all. What do you hope to achieve? Make sure that a meeting is the best means to that end. If your goal is simply to disseminate information, an e-mail may be a better, more time-efficient approach.

Meetings are most effective in situations that require interaction and input from multiple people—such as brainstorming, problem solving, or decision making. Meetings also make sense when the topic or issue at hand is challenging or emotional, and it would be better to address the concerns and questions of your people face-to-face.

Once you understand the purpose of your meeting, develop a clear set of measurable objectives. These will drive your meeting agenda and help you stay focused during the meeting itself.

Create an agenda and distribute it in advance. Once you know the purpose of your meeting, create an agenda. Productive meetings require structure and planning.

If you're trying to reach a decision or solve a specific problem, provide the needed context, research, and parameters in advance, so meeting attendees have the background they need to hit the ground running. If it's brainstorming you're after, structure is a critical part of creativity; plan for both getting wild and getting real.

The best meetings get everyone actively involved. Use the agenda to assign roles and clarify what you expect each person to contribute. Then distribute the agenda and any prework well in advance so that people have a chance to think about the topic and prepare their contributions.

Make sure your agenda is realistic. Don't try to achieve more than the meeting time comfortably allows. One way to do this is to include time limits for each topic on the agenda—say, two minutes to introduce a new team member, 10 minutes to discuss the production schedule, and so on. An overly ambitious agenda can lead to rushing over important items; an unfinished agenda can be demoralizing and lead to yet another meeting.

Too often we relegate "wrap-up" to five minutes—which is never enough time for a thorough review of who is doing what and why. Allow enough time for a significant review of decisions made and assigned action items to ensure everyone is on board. You'll save everyone time ("Why was I supposed to meet with Barbara, again?"), and you'll see more follow through.

Be sure to bring extra copies of the agenda to the meeting—one for each participant.

Invite the right people—and the right number. Whom and how many people to invite depend on the purpose of your meeting. If the purpose is to quickly share critical information with as many people as possible, the group can be as large as necessary. But if interaction is critical, size becomes more important. Too many people can stifle creativity, and too few can limit input and stymie progress. Five to eight is a good range.

Think about who can help you achieve your meeting objectives. Sometimes specific expertise is needed. At other times a broad, cross-functional group of people is more effective. Either way, it's often useful to talk to people ahead of time to lay the groundwork for the outcome you hope to achieve. Advance "lobbying" can make the meeting go more quickly and smoothly.

If the meeting group is large, break into smaller groups to work on specific tasks or problems, and reconvene to share results.

Be considerate of everyone's time. If an individual is needed for only part of the meeting, plan the agenda to allow for an early departure or late arrival.

Set ground rules. If you're meeting with the same group of people on a regular basis, the group can develop these guidelines together. Otherwise, suggest some ground rules at the beginning of your meeting and get buy-in from the attendees. This is also the time to appoint a meeting scribe to capture the meeting highlights.

The best guidelines encourage participation by everyone and keep the meeting on track. For example, your group may decide to let only one person speak at once, disallow interruptions, set time limits on contributions, table issues that aren't easily resolved, limit conversations that stray from the topic at hand, and make sure that everyone is heard from. Although you'll want to discourage disrupters, be sure to encourage differing points of view.

Often the most thoughtful or creative people are the ones least likely to speak up in a meeting. To make sure you collect everyone's input, survey the attendees, take a straw vote, or go around the room to get the opinions of each person. When all attendees feel they've contributed, widespread buy-in and cooperation are more likely.

Start and end on time. No one ever complained because a meeting ended on time. Many meeting planners find it useful to appoint an official time-keeper who works with the facilitator to keep things on track.

Start by reviewing the purpose of the meeting, why it's important, and what the objectives are.

To keep things moving forward, manage each segment of the meeting. Table any issues that can't be resolved, try to keep attendees from sidetracking the discussion or going off on tangents, and limit question-and-answer periods.

If you do fall behind schedule, work with the group to prioritize the remaining agenda items instead of rushing through everything and achieving little—or making the wrong decisions.

If time runs out in the middle of a particularly fruitful discussion, ask the group if it's okay to go beyond the scheduled end time. And be sure to allow time to wrap up the proceedings.

Clarify action steps and responsibilities. Without a plan for moving forward, even the best outcomes can languish as the initial enthusiasm and commitment dwindle away. Create an action plan and stick to it.

As a group, discuss and agree on specific action steps and responsibilities,along with clear time frames. Identify possible problems or challenges that might hinder progress, and discuss who will take responsibility for resolving them, and how.

Things to consider: what resources are needed, who must provide input or permission, whether further research is necessary, which other people should be involved, and what else is needed to move forward.

The action plan is the heart of your meeting—the critical outcome—and a key task of the meeting scribe is to capture it in writing.

Follow up—and follow through—promptly. When the meeting is over, the follow-up begins.

To drive your action plan forward, send out the meeting notes promptly—within a day or two. Detailed minutes are less important than a summary of the meeting's key points, decisions made, action steps, responsibilities, and time frames.

Distribute the meeting notes to meeting participants and to anyone who will be affected by the decisions made or the actions taken.

As the deadline for each action step approaches, follow up with those responsible and get a progress report. If deadlines are slipping, offer to help. The key is to maintain the momentum and commitment needed to drive home the outcome put in motion during your meeting. Then all participants can enjoy the satisfaction that comes from working well and productively together. That just might start to give meetings a good name.

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The Key to Shorter, Better Meetings

by Anthony Tjan

Here is a simple managerial tip for meeting effectiveness that I learned some years ago.

Outside general relationship building, consider that **a business meeting has only three functional purposes**:

1. To inform and bring people up to speed.
2. To seek input from people.
3. To ask for approval.

Use this as a filter to determine why you are having a meeting, and explain that purpose to your audience. Your meetings may often cut across multiple objectives, but forcing yourself to clarify the agenda into these three purposes can result in more effective meetings.

Consider a meeting that sets its agenda goals along the lines of: "I want to bring you up to speed on these two things; I need input on this item; and, finally, I would like to seek your approval on these outstanding issues." That's it—a simple three-purpose meeting rule that frames the goals of the meeting from the perspective of the meeting participant.

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Calculate the cost of the meeting before even scheduling it, to see if it's worth it. For example, if 10 people are invited, [each earning] an average salary of $75K, then the hourly cost for the meeting is [rough figure] about $530 per hour. Is it truly necessary? —*Posted by* ***Matthew "ROI" Stern*** *via*

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Why We Secretly Love Meetings: The Status and Social Drive Beyond the Agenda

by Ron Ashkenas

Is too much of your time spent in unnecessary or ineffective meetings? Most managers consider meeting fatigue and meeting failures as two of the most significant drains on their productivity. As a result, an entire industry has sprung up over the past 20 years focusing on "meeting management." Many companies have courses on how to run good meetings, and in case you miss the training, there are posters, laminated cards, and checklists for preparation, conduct, and follow-up.

As a result of this saturation of meeting education, almost every manager knows the basic rules:

- Be clear about what you want to accomplish
- Invite the right people
- Send out pre-reading material in advance (include an estimate of how long it should take people to read it)
- Have an agenda and follow it with discipline
- Send out notes with key decisions and action steps

You know the drill.

Unfortunately, these basic and widely understood guidelines for effective meetings are probably the least followed in corporate history. If the government conducted "meeting audits," many companies would probably fail. Most managers complain about ineffective meetings and yet schedule multiple meetings and run them poorly. It's an amazing phenomenon.

This leads to one of the dirty little secrets of organizational life: Despite their protestations, at an unconscious (or conscious) level, most managers actually *like* meetings, for several reasons.

They encourage social interaction. Most people don't enjoy working alone; they want contact and relationships with other people. Meetings make them feel part of a community and give them an outlet for sharing their personal feelings and opinions, not only on work issues but also on personal or political topics. So, some of the seemingly off-target chatter in meetings (even the complaining) is the realization of an important social outlet.

They keep everyone in the loop. As firms have become more matrixed and interdependent, meetings serve as the informal loom that weaves together the organizational threads. People need to know what's going on in other parts of the organization. They need informal sources to supplement the formal communication mechanisms—and to guide them through political and personal minefields. These information networks are created, reinforced, and expanded through meetings.

They often represent status. Membership on multiple committees implies that you are important and that your opinion is valued, and it means that you have a seat at a decision-making table. Attendance at staff meetings means that you are part of the leadership team. Even being asked to present or answer questions at a meeting on a one-time basis gives you visibility with senior people and is status-enhancing.

These psychological drivers of meetings are very powerful—and usually trump all the logical and rational "meeting management" advice that is doled out in courses and articles. In other words, what seems like wasted or unproductive time for many managers is actually fulfilling important personal and organizational needs.

This does not pardon meetings run wild and the time we lose to them. Managers at all levels need to be continually on guard against unnec-

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First we need to determine if the meeting is necessary or if it can be handled with an alternative solution such as an e-mail, a blog, or a conference call. A "presentation" can be e-mailed as a video link. **I then decide if physical attendance is truly a requirement.** This way, attendees have a clear understanding that if they are in a meeting, their direct physical involvement is necessary. If the attendees have a stake in the subject matter, then it's not a waste of time. If opinions are needed, it is often better to send an electronic survey that gathers the data rather than ask for attendees to provide feedback during the meeting. As statistics have proven, when asked for feedback in a group setting, people suffer from "herd mentality," and the new, inspiring, challenging—and often best—viewpoints are lost in the crowd because no one wants to "make waves" and upset the status quo. This also cuts down on the time spent in the meeting and gives attendees a chance to digest the information and spend more time thinking about their true, original responses rather than what everyone will think about what they have to say or their motives for saying it.

And aside from necessary meetings, I think that social or team-building meetings should be handled separately and off-site over lunch. That way, you make the distinction between the two, and you are handling both the business and social needs of the organization. *—Posted by MG*

I think the rise in such meetings (and conference calls as well) and their eventual ineffectiveness are largely a consequence of a few factors. 1) Organizations are structured more toward "functions," where specific skilled people are "shared" across different areas and teams, so an easy way to make "teamwork" happen is via meetings. 2) With most corporate work being knowledge-based, there is more flexibility in how/where people get their work done, so the only way to secure a team's time and attention is via meetings. 3) Because of a lack of an alternative tool and process support, essentially meetings are where collaborative knowledge work gets done.

We can't do much about the first two factors, so the hope is in fixing the last factor. An active, real-time brainstorming may call for a meeting, but all other meetings can be eliminated by alternate solutions. All chatter that now happens in meetings should happen through collaboration tools (wikis, internal web forums, blogs with interaction). Decision making should be delegated to the appropriate lower levels and, in most cases, should identify one person with authority and accountability for operational decisions.

The behavior change to move away from scheduling and attending meetings is a challenge. **Perhaps if the ineffectiveness is captured via some metrics and advertised widely, change might happen faster.** *—Posted by Sudhar*

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essary meeting proliferation and poor meeting disciplines. For example, several years ago in GlaxoSmithKline's research organization, there was a realization that—as a result of multiple project meetings and the inclusion of all functions on drug development teams—many people were spending as much time in meetings as they were on actual drug development work. As a result, the company developed a "fit for purpose" meeting process in which only the people directly involved in a particular phase or issue of the project attended the meetings, while others just received information.

All organizations should periodically look at their meeting patterns and make adjustments like this in addition to encouraging the use of agendas, virtual-meeting approaches, and all the rest. However just complaining about too many meetings or poorly run meetings won't do much good. Like moths to a flame, we'll keep coming back, no matter what we say.

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Give Your Standing Meetings a Makeover

by Martha Craumer

Some of the most dreaded meetings are those regularly scheduled gatherings that seem to be called out of habit or a sense of duty. Staff meetings, progress report meetings, and sales meetings all fall under this rubric. They are valuable not only for the information shared but also for the face time they offer. However, their importance doesn't necessarily make them interesting. Meeting with the same people in the same room every week to discuss the same topics can get boring, resulting in many empty chairs—and lack of enthusiasm among the remaining attendees. Here are some ways to keep your regular meetings fresh—and attendance high:

Regularly review the meeting's purpose. From time to time, remind participants of the reasons for meeting, and ask if the meeting still serves that purpose. For example, a project team may hold twice-weekly status reports at the beginning of a project, when there are a lot of new developments and many decisions to make. Once the initial frenzy subsides, there may only be enough new information to warrant a monthly meeting.

Solicit agenda items from the group in advance. This gives attendees a chance to bring up issues that are of interest to them.

Cancel when there is no reason to meet. Nothing on the agenda? Don't meet. There's no sense in gathering together just because it's what you do on Tuesdays at 11 AM People will come to appreciate that your meetings won't be a waste of time.

Rotate leadership of the meeting. Have each attendee take a turn running the meeting—setting the agenda, preparing materials, and introducing topics. It's a great way to inspire ownership of the meeting.

This content originally appeared in "The Effective Meeting: A Checklist for Success" (Reprint #C0103A).

Extreme Ways to Shorten and Reduce Meetings

by Gina Trapani

All managers spend a bigger chunk of their workdays in meetings than they'd like. Meetings interrupt your workflow, eat up hours you could be spending more productively, and even increase fatigue. Although getting everyone in a room to discuss an issue might be the only way to make a decision, some companies have laid down the law to reduce meetings that waste people's time.

We all know that a good leader who starts on time and sticks to a firm agenda makes for a productive meeting. Here are a few more extreme techniques for keeping meetings on track.

Count down remaining time with a stopwatch. Meetings that start late and go beyond their designated time are more commonplace than they should be. *BusinessWeek* reports that large Google meetings stay on time thanks to a visible, ticking clock. To add a little pressure to keep meetings focused, Google gatherings often feature a giant timer on the wall, counting down the minutes left for a particular meeting or topic. It's literally a downloadable timer that runs off a computer and is projected four feet tall.

Keep everyone standing. No one's willing to linger too long on a tangent in a meeting if her feet hurt. Blogger John Trosko said instituting "stand-up" meetings at a Los Angeles–based company he worked at made them more efficient and faster. "Instead of sitting at a traditional conference table, we took the chairs out of the room and ran meetings while standing on our feet. Well, the length of the meetings *drastically* dropped because people didn't want to stand for long. Meetings went from 30–60 minutes to roughly half of that while still delivering meaty content."

Ban distractions. Todd Wilkens of design firm Adaptive Path says that he gets meeting attendees to focus by asking everyone to forgo their laptops, iPhones, and BlackBerrys during the meeting. He goes the extra mile to make this happen: He'll call out folks who are surreptitiously checking e-mail during a meeting and will even ask everyone to put their mobile devices in a box or on a counter in the corner of the room during the meeting.

Never schedule meetings more than 30 minutes long. At web application development firm 37signals, meetings rarely happen because they're considered harmful. But if a meeting is absolutely necessary? Make it no longer than 30 minutes, go in with a very specific issue at hand, and hold the meeting at "the site of the problem"—have the code, design, documents, and numbers in front of you.

Sometimes just keeping good meeting practices front and center during a gathering can help. At tech publisher O'Reilly's main campus, meeting guidelines are posted on the wall of every conference room.

Gina Trapani is the founding editor of the personal productivity blog, Lifehacker.com.

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Find more content by Gina Trapani at blogs.hbr.org/trapani.

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To keep impromptu meetings short, I instituted Dance Meetings.

By playing some funk [music] at low levels through my computer speakers, I'd encourage my colleagues to dance. We'd dance for the duration of the song as we discussed their projects, challenges, personal troubles, and so on.

The benefits were immediately clear:

- **Meetings were kept to about five minutes—maximum, 10, for an extended James Brown tune.**
- Self-conscious people were intimidated and didn't drop in as often.
- The dancing immediately put us in a good mood—so much so that even people with major complaints always left my office with a smile.
- It was a lovely, surreal bonding moment that boosted morale within my team.

This isn't the sort of extreme method that will work in every office, of course, but it sure worked at my casual-yet-hectic workplace. And it certainly made for quick and effective meetings. *—Posted by Dominic*

Whenever I'm in daylong strategy meetings, **I stand up. I find myself more attentive, creative, and eager to offer and receptive to input.** I've also found that that kind of energy can raise the energy of others. *—Posted by Bob Ferrer via*

Show the hourly cost of the meeting on the agenda. When people realize how much a meeting is costing the company, they are more apt to stick to the agenda. *—Posted by Derrick Vincent via*

I regularly use **withholding of food**/pending lunch as a threat [to help keep people focused and meetings short]. *—Posted by @KristinMaschka via*

Use a buzzer. The agenda has arbitrary time limits with line items… at the end of each time limit, cut off and assign follow-up with next steps. *—Posted by @LelanWard via*

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The 50-Minute Meeting

by David Silverman

I have a life-changing proposal for businesspeople everywhere: **50-minute hours**. Start a productivity revolution by scheduling business meetings that, by default, run 50 minutes long instead of 60.

How often do you find that by 11 AM you're running late, and by 3 PM, you've either been forced to dump a meeting to reset your day or are 100 e-mails behind because you've gone straight from one appointment to another all day long? Either way, you're leaving someone (or many people) in the lurch. It's a stressful and unsatisfying existence.

There's another group of people who are scheduled in back-to-back sessions all day long, five days a week. I speak, of course, of students. All the way through school we're taught in 50-minute blocks—a schedule that lets us get to our next class on time. The buildings even have bells to remind the person running the meeting, er, class, to end on time.

Why is it, then, that when we graduate, they take away our bells, replace them with an irritating "doink" sound signaling "15 minutes until your next meeting," and assume we can now teleport to the location of same? What could cause such madness? In two words: Microsoft Outlook. (Not without blame would also be Lotus Notes, Google Calendar, Apple's iCal, and so on.)

By default, Outlook sets up meetings that are 30, 60, 90, or 120 minutes long. There's no room for "travel time," to compose yourself and answer a couple of e-mails, or for a coffee or bathroom break.

Next time you're faced with scheduling a meeting, consider booking a 20-minute or 50-minute session. See what you can accomplish in that time and if you can still get to your next meeting on time. You may just start a new trend in your organization.

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Find more content by David Silverman at blogs.hbr.org/silverman.

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My understanding is it takes the human brain between 5–10 minutes to change subjects effectively. When a meeting goes the full 60 minutes and the next meeting starts right away, this leaves no time for the brain to finish processing the information from the first meeting so it can begin processing the information for the next meeting. **So people are not just physically late to meetings, they are also mentally late.** This can lead to people missing information or not fully understanding the topic.

I think 50-minute meetings are a great idea, but it would have to become part of the company culture and be an expectation for every meeting. *—Posted by Herb*

I've taken to displaying my Outlook Calendar in 15- or even 10-minute intervals instead of the default 30 or 60 minutes. I find it's a simple fix that works well; now I explicitly schedule meetings in 15-minute chunks. Visually, it also helps as the "discretionary time" gaps become more apparent. *—Posted by Nick*

I always add a buffer before and after all meetings (generally 15 minutes for internal meetings and 30 minutes for those outside the office) and never schedule meetings adjacent to each other. I have learned to assume I will need extra time (due to traffic, trouble parking, bad directions, and so on) so I sometimes arrive early but avoid the stress of being late. I have adjusted the default reminder on my Outlook calendar as well. *—Posted by Sharon*

I always set a conversation or catch-up in 25- or 55-minute increments to allow attendees sufficient time to leave and arrive at their next destination on time. **I have found that people appreciate this "small" thing.** *—Posted by Steve Mason via*

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How to Get People to Look Forward to Your Meetings

by Jane Heifetz

When you begin to follow the steps in this guide to organize your meetings, you'll quickly earn a reputation as an effective facilitator. That reputation will yield great rewards in terms of participant engagement and attendance. The following items are small and thoughtful things you can do to help build team morale and make meetings more pleasant—and productive.

Preparing your meeting

- **Scheduling.** Increase the likelihood of everyone arriving on time and of having the energy to focus on your agenda by:
  - Trying to schedule it when most participants aren't in back-to-back meetings.
  - Avoiding first thing in the morning when people are rushing to get to work and have their first cups of coffee, and the end of the day when people are tired.
  - Avoiding right before vacations when everyone's rushing to finish *their* to-do lists, not yours.
  - Providing snacks to keep everyone's energy levels up if you need to schedule a just-before-lunch or end-of-day meeting.
  - Providing snacks anytime, really!
  - Limiting the meeting time to no more than one hour. If there's really that much to cover, break the information into several smaller meetings.
  - "Avoiding scheduling 'last-minute' meetings. Out of respect, plan ahead." *@KristinMaschka via*
- **Location.** Book as small a room as everyone can comfortably fit in. This fosters a more cohesive group experience and encourages everyone to participate.
- **Setting up the room.** Schedule 10–15 minutes for yourself before the meeting starts to allow for time to set up the room. You don't want to wait for another group to vacate the room before you have time to set up.
  - Clear away any debris left from prior meetings.
  - Arrange the chairs.
  - Put an agenda in front of each chair, along with any handouts you distributed previously.

  - Put a piece of candy on top of each person's agenda for an especially welcoming touch.
  - Set up any visuals. You'd be amazed at the impact of a physical display when folks first enter the room.
  - Put refreshments in the center of the table. It's almost always useful to have some type of light food/drink—even when it's not lunchtime.
  - Set up a whiteboard with markers or hang large sheets of paper for note-taking.

Celebrating the group and individuals

- Be alert to individuals' birthdays and other reasons for celebration (e.g., completing an MBA). Mark those events with special refreshments at the meeting.
- Celebrate milestones in the group's work (e.g., completing a product launch or achieving a revenue target) with special refreshments.
- Celebrate individuals' milestones that may not be related to this team's work. For example, two of your team members completed another product launch. This demonstrates your awareness of how hard these team members are working—not only on your project but also on other projects.

Jane Heifetz is the executive editor of Product Development at Harvard Business Review Group.

How to Reach Group Decisions During Meetings

How many times have you left a meeting frustrated because you had no idea what decisions the group reached? How much time did you feel you and your colleagues wasted during that hour or two?

Facilitating group decisions is rarely easy. The following suggestions for choosing the right decision-making method will help ensure that everyone leaves your meetings with clear decisions and next steps for implementing those decisions.

You can use three common decision-making methods with groups: majority vote, group consensus, or leader's choice. Each has its own benefits and challenges.

Majority Vote

The proposal or idea with the most votes wins.

Advantages:

- The group arrives at a decision relatively quickly.
- The group perceives the decision to be fair.
- You hear from everyone, even people who are usually quiet.

Disadvantages:

- Open voting requires taking public stands on issues and can result in perceived winners and losers.
- People may not feel comfortable voting according to their true feelings or voicing reservations they might have about decisions.
- Losers often feel their voices have not been heard.
- Not everyone buys into the decision.

Group Consensus

Group consensus does not mean arguing and lobbying until everyone agrees. It means reaching a decision that everyone understands, supports, and is willing to help implement.

Advantages:

- Allows all meeting participants to share their expertise in order to arrive at the best decision.
- Results in all participants understanding the decision and its implications.

- Greatly enhances the chance for buy-in from all parties.

Disadvantages:

- Participants may not be familiar with this decision-making process: they may think that they all have to agree to and believe in the final outcome, so it may feel like people are spinning their wheels or heading in the wrong direction.
- May take more time than other decision-making approaches.
- May require that you have an alternative decision-making process (e.g., leader's choice) in case consensus cannot be reached within given time constraints.
- "Without the visual cues of nodding heads or eye rolling, virtual meetings can be tough for consensus building." *@IC_Jen via*

How do you know when you have a genuine consensus? You'll hear comments such as "Option A isn't my first choice, but I do believe it incorporates everyone's needs." Or "I don't think Option A satisfies all our criteria 100%, but I'm prepared to implement it as fully as possible."

Leader's Choice

In some ways, having the leader decide is similar to a majority rule because the leader needs to hear what the participants think and is most likely to agree with the majority view.

Advantages:

- It's the fastest approach to decision making and may be the best approach when time is short or when there is a crisis.
- If the meeting participants respect the leader and understand why she is making a certain decision, they are somewhat more likely to buy into the decision.

Disadvantages:

- Meeting participants may feel that the leader is ignoring their views, particularly if they haven't been given the chance to state their ideas.
- You may encounter resistance during implementation, as meeting participants may feel less ownership or may not have bought in 100%.

Tips for Getting Full Participation in Meetings

Full participation is key to meeting success—and to implementing the group's decisions. If people feel their voices aren't being heard, they can create bottlenecks in the implementation process.

Here's how to make sure you hear from everyone:

- Monitor your own level of contribution to ensure you don't dominate the discussion.
- Be positive and encouraging about individuals' comments.
- For important matters, restate what people say. Reflect the view as accurately as you can without criticizing it. Ask if you got it right, which gives the participant the opportunity to clarify.
- In larger meetings, record everyone's input on a flip chart.
- Find the basis for common understanding, showing the links among the various comments people make.
- To get input from everyone on important matters, ask for each person's thoughts.
- When you sense there's a lot of interest in discussing a point, watch and listen for everyone who wants to contribute. Acknowledge each person with eye contact and a nod or by saying, "Let's hear from [X] first, then [Y], then [Z]."
- Remember that silence doesn't always mean that a person is not participating. Be sensitive to a person's need to listen.
- Break larger groups into pairs or trios, and have each group report back.

Tips for Virtual Meetings

Skype, WebEx, and old-fashioned conference calls are a part of daily business life. Although most standard meeting rules apply, there are several additional things to keep in mind to ensure your virtual meetings are successful.

Prepare

- Check in with remote attendees a day before the call begins to ensure they've received pre-reading materials and that they haven't had any difficulties downloading the files.
- Explore web-conferencing tools to enable screen and file sharing. Take them for a test run before your scheduled meeting to familiarize yourself with the tools and to trouble-shoot any potential problems.
- Block out prep time in your calendar to pick up any extra materials such as projectors or cables and to allow for problems to occur—and be resolved. There's nothing worse than watching precious minutes slip by as a facilitator struggles with a PowerPoint presentation or projection monitor.
- "Plan for obvious—but crucial—things like time zones/net connection quality." *@IrisJumbe via*
- Avoid scheduling status reports virtually; use the precious phone/screen time to brainstorm, resolve differences, and make decisions. Team members can read any status reports before the meeting, so time together can be used to address any questions about them.
- For recurring meetings, "Rotate the facilitator and scribe roles to keep everyone involved." *Windy Nicholson via*

Conduct

- Basic but critical: Make sure that all participants can be heard and can hear you.
- Speak clearly—don't shout (especially on a speakerphone), and avoid slang that may not be familiar to call participants from other regions, cultures, or countries.
- Set or review the ground rules for participating: "In virtual meetings, rules need to be much more spelled out—e.g., how do you ask a question, make a comment—and [it] depends on the medium." *@rdatta via*
- Pause and take stock of where you are on the agenda more than you might in a face-to-face meeting. Is there enough time for people to raise questions or participate?
- "Know who is on the phone and ask them direct questions. Ensures that you hear opinions and keeps all engaged." *@IC_Jen via*
- "Set expectation that [participants] will be called on." *@oneill_colin via*

- "Print a picture of each person on the phone and stand it on a tent or box in the middle of the table to remind everyone in the room." *Charlie Anderson via*
- "Do sound checks regularly. Check in on the remote [attendees], and make sure they can hear if they are not actively participating." *Berl Kaufman via*
- "[It is] important to pay close attention to tone of voice and other clues—quiet is usually a bad sign in a virtual meeting." *@mkmackey via*. If people on the line fall silent, pause and check in to see if they are confused about a point or having a hard time hearing someone.
- Conclude the call as you would any meeting, including summarizing decisions made and next steps.

Participate

- Remember that people can't see your face and sound quality might be tough for hearing subtle emotions, so make sure you express yourself ("I'm surprised to hear..." or "I'm happy to hear...")
- "Turn everything else off and tune out as many distractions as possible. Make the meeting front and center." *@ZLDoty via*

June Delano is managing partner and cofounder of The ClearLake Group.

Making Global Meetings Work: Inconvenience Everybody Equally

by June Delano

With a team scattered across time zones, someone's always going to be taking 3 AM calls. Make sure that everyone shares the burden equally.

"Running a virtual team is an interesting challenge, especially if people are spread across countries and time zones and have different levels of language proficiency. At one time I had a team of about 17 people spread across 10 countries, and we needed to have a meeting weekly or at least every other week. The challenge was that somebody was always in the meeting in the middle of the night, somebody was always the only person in a room while other people were in small groups.

So we experimented and came up with a model we called "inconvenience everybody equally." That meant that we rotated our meeting time so that at some point, everyone, whether he or she was in London, Berlin, New Delhi, or New York, was up in the middle of the night or in the middle of his or her normal workday. And it meant that everybody got a chance to be drowsy and falling asleep, as well as wide awake and full of energy at the peak of their day.

We also came up with a rule that, at first, was very hard to enforce: Even if there were several people in one location, each needed to be on the phone separately—not in a room together. It completely changes the dynamic of a meeting if some people are in one place and can see and talk to one another offline.

So although several of us were sitting in a row in cubicles in the same office, we made sure that we all got on the phone equally with everybody else. That meant no side conversations and that everybody needed to put their expression into their voice rather than rely on facial expressions.

We also learned that it was really important to have an agenda go out ahead of time, particularly when you have people who are speaking a second or a third language. Doing so gives them a chance to read and get familiar with the content and what's going to be discussed.

And, finally, we made sure that we kept the agenda to those things that really mattered to everyone who was on the phone. If there are 17 people on the phone, then you don't want to have people getting bored and losing their sense of involvement and engagement in the meeting."

This content originally appeared in the Virtual Teams module of Harvard ManageMentor (product #6789AR).

What people are saying on HBR.org

If you…speak a language other than English, never ever use your foreign language to communicate [with] your team in the meeting—sends the wrong signal and creates ambiguity.… —*Posted by* ***Arshi Pathan*** *via*

Ask questions right away to get clarification while the topic is fresh. Push to make sure you understand and overcome any language barrier that might be there. —*Posted by Joel*

Site visits can be extremely useful in helping to build relationships (i.e., knowing the person on the other side of the phone). —*Posted by* ***Jerome P. Kelliher*** *via*

[It's important] to know how meetings are typically run in that country or region and what the local etiquette is. For instance, if you are visiting a business partner [in some cultures] you can't just walk in and start talking about the issue at hand. You have to sit down and wait for the host to possibly offer you water, and then ask about the news. And usually you say [the news is] good and [then] tell them what the objective of the meeting is. Then you can start discussing whatever you are there to discuss. —*Posted by* ***Lara Ho*** *via*

Be prepared for follow-up meetings because unless the issue is relatively straightforward, it will require additional discussions simply due to potential misunderstandings. —*Posted by* ***Jerome P. Kelliher*** *via*

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When Bad Things Happen During Good Meetings

No matter how well you've prepared yourself and your participants, things can still go wrong in meetings. Here are some ideas for managing common meeting problems.

If some participants arrive late or leave early:

- Consistently begin and end meetings on time.
- When people are late, resist the temptation to catch them up to where you are by recapping what's been discussed already. Keep moving forward. You can catch them up after the meeting, or they can figure it out on their own—either way, you will gain a reputation for not catering to perpetual latecomers.
- "To avoid latecomers and to get everyone's attention, start a meeting at, let's say, 10:03, instead of 10 AM This gives an extra three minutes to the latecomers (5%), and the rest can save their three minutes and not be penalized for showing up on time. That's a lot of minutes saved and sends the message across to the latecomers to improve their habit." *Nirav Vira via*
- Check in with the chronic latecomer (or her assistant) the day before the meeting to see if the meeting time still works for her. Reiterate the specific reason you invited her.
- Stop by the latecomer's desk on your way to the meeting and ask if he wants to walk with you.
- Give participants (especially those who have a habit of being late) a job to do during the meeting.
- "Another tool for getting better attendance at meetings: Make it clear decisions will be made by those attending." *@ideasurge via*
- Select a conference room that has fewer chairs than participants—people will be on time to get a seat or avoid being late and making a scene by dragging a chair in.
- "Build a reputation as someone who holds a good meeting. Include the basics: Start/end on time, follow agenda, take input seriously." *@IC_Jen via*
- After the meeting, ask the person privately why he missed part of the meeting. Find out what the underlying causes for the behavior may be.

When people haven't done their pre-work:

- Ask someone who has read the materials to summarize for the group, with a time constraint: "'Sally, please spend 5 minutes briefing us on the pre-meeting info.'" *@Tinu via*

WHEN A SIT-DOWN IS CALLED FOR

Sometimes none of the things you do in a meeting will help break someone of her problematic behavior. If this is the case, you need to sit down with that person and speak directly with her. Here are ways to approach the encounter.

1. **Ask permission:** "May I talk to you about today's meeting?"
2. **Clarify goals:** Ask the person what she hopes to get out of the meetings. Then discuss what you see as the meetings' core goals.
3. **Describe the behavior:** "I see you doing X." This way, you each have a common reference point.
4. **Describe the consequences:** Explain how the behavior is affecting the group's performance, and detail the consequences you see it having for the group.
5. **Inquire about the root of the behavior:** Ask, for example, if she is upset about a particular issue.
6. **Make a specific suggestion or request:** "At the next meeting, please try not to dismiss an idea until others have had a chance to finish their thoughts." Being unambiguous increases the likelihood that she will change her behavior.
7. **Agree on next steps:** Getting the person to commit to changing her behavior will help her actually do so.

If a participant dominates the discussion:

- Thank him for his input and call on someone else.
- Interrupters can be especially frustrating. When this happens, encourage the speaker to finish his point, and tell the interrupter, "Please let [the speaker] finish."
- In long meetings, speak with chronic interrupters during a break. Offer to meet with them off-line to hear their concerns.

If the group keeps repeating points already made:

- Keep track of ideas on a flip chart, whiteboard, or projected list.
- When someone repeats an idea, point to the item and ask, "It looks as though we've already covered that point. Is there something new you want to add?"
- Confirm your understanding of the ideas presented by using active listening, for example, repeating back to the participant a fair and accurate summary of what he said.
- If people persist in revisiting a point, you can seek resolution on the spot, saying, "Well, this is obviously important to the group, so let's deal with it right now."

If some participants disturb the meeting:

- Ask for a single focus, saying something such as "Our purpose today was to shape our innovation strategy for the year. Let's refocus on that."
- In a long meeting (more than an hour), call for a break if the problem continues. During the break, ask people individually what's going on. Get at the reasons for the disturbance and, if necessary, directly ask the offending parties to stop. Tell them you'll address any legitimate concerns after the meeting.

If the group falls silent:

- Let it be silent for a minute. Wait before giving them a suggestion. The group may need time to reflect on an idea.
- Name what's happening, and ask the group about it, "It seems we've gone quiet. Does anyone want to talk about what's going on?" Try humor: "Well, that was a real thread killer!"
- Ask if people need clarification.
- Think about whether *your* behavior might be the problem. Perhaps you came on too strongly in an opinion or a preconceived solution?
- Take a short break to refocus and find new energy.
- If the group just seems worn out, consider ending the meeting and rescheduling.

If there's an elephant in the room:

If the group is avoiding an issue or focusing on one issue to the exclusion of others, it may be because members are afraid to bring up a particular subject.

- Raise the issue to get the group moving again (that is, name the elephant).
- Ask contributors to be precise about the nature of the problem, issue, or opportunity.
- Thank a participant if he brings up a controversial viewpoint. You'll reinforce the idea that constructive debate is often a good way to find solutions.

- Let the group know how important it is to bring up all options and issues, even if they are difficult. Let them know you will not "kill the messenger."

If angry conflict arises:

- Let all members know that it's fine to be passionate, but ask people who are unable to control their tempers to deal with their issues outside the meeting room.
- Focus on the substance of the ideas or opinions—not on the contributor's personal style or status in the organization.
- Encourage members to keep their comments positive and constructive, and to try to see all sides of a contentious issue.
- Use probing questions to steer members away from entrenched positions and to help uncover the underlying issues.

How to Interject in a Meeting

by Jodi Glickman

How many times have you sat through a meeting with something brilliant to say but never knowing quite when to say it? Or realized halfway through the meeting that your colleague said something completely erroneous? Or, worse yet, found yourself nodding and smiling in agreement while wondering what in the world the discussion was actually about?

Speaking up in meetings—to interject, correct someone else, or ask for clarification—can be extremely intimidating. Having a few useful phrases at hand can go a long way toward giving you the confidence and tools you need to be able to interject your thoughts and opinions effectively in group situations and meetings.

When You've Got an Idea

Often people don't speak up because they're afraid of going on the record as wrong, uninformed, or the proponent of a dumb idea. A great way to sidestep this inherent fear is to depersonalize your idea, putting a question to the group. When you think you might have a good idea but aren't overly confident about it, go ahead and lob in an off-handed caveat, such as:

- *Have we thought about*...getting Steve involved in the PR campaign directly?
- *Did anyone mention*...the Brealy report? I seem to recall it covered some of the same topics Andrew has raised here.
- *Another option we may want consider*...is pushing back the timeline until early October.
- *Is it worth revisiting*...last week's minutes from the meeting to review the agreed-upon product specifications?

The subtext here is that you're contributing to the conversation and adding value to the group—but not taking ownership of an idea or commandeering the conversation. By using a more informal question or caveat, you'll be able to make your voice and idea heard without overstating your commitment to that idea.

When You Disagree

It's hard to disagree without being disagreeable. When the conversation is heading in a direction that you don't agree with, it's often hard to keep your mouth shut. Of course, it's your right (and perhaps even your responsibility) to speak up when you've got something contrarian to say; the key, however, is knowing how to finesse your comments so you don't come off sounding like a jerk. Here are a few strategies and helpful phrases to use in those awkward or tense moments:

- Be blunt: *I respectfully disagree* with that assessment, Jon. Or, *My experience has actually been quite different*...I found the team to be highly engaging.
- Be cagey: *I just want to play devil's advocate here for a moment, what if we were to*...go with the opposite approach and use direct-mail marketing instead of relying solely on social-media efforts?
- Be provocative: *I want to throw out a curve ball here and*...challenge our assumption that we have to take the deal.

When You're Confused

And, finally, what's worse than sitting in on a meeting and having no idea what's going on? You may have stumbled in late, tuned out at exactly the wrong moment, or simply never known much about the topic at hand—and found yourself falling further and further in the dark as the meeting progressed. No matter the case, the longer you wait to ask for clarification, the harder it is to meaningfully reinsert yourself into the conversation. Here are some good phrases to use the next time you find yourself lost in a meeting:

- *Forgive me if I'm behind the 8-ball here, but I'm a little confused about*...which marketing program you're suggesting we table.
- *I'm not entirely sure I'm following you; could you please recap what you just mentioned regarding*...the August delivery?
- *I'm sure I'm supposed to know this already, but*...how many attendees are we expecting at the conference next week?
- *I apologize if this is totally obvious to everyone here, but*...what does CAFE stand for?
- *This may be a dumb question,* however, I'm still not up to speed on why...we're not using rail instead of truck.

You'll do better for yourself if you speak up in meetings and make your case—whether to push a new idea, correct a misconception, or simply keep yourself up to date and current on what's really going on. You owe it to yourself and your team to contribute to your fullest potential—it's far less intimidating than you may think.

Jodi Glickman is a speaker and founder of communication training firm Great on the Job. Her book *Great on the Job* will be available in May 2011. Follow Jodi at @greatonthejob.

Posted November 3, 2010
Find more content by Jodi Glickman at blogs.hbr.org/glickman.

What people are saying on HBR.org

This article refers to asking questions but mainly focuses on HOW to interject, not WHAT. The problem, as I see it, is that too many managers think that the only way to contribute to a discussion is by making comments on the content under discussion. Very few consider contributing by asking engaging, stimulating questions, such as:

- That's a good point—what are the possible downsides or risks of your idea?
- What other options are worth considering?
- What are the pros and cons of those other options?
- What are the implications of this idea for X, Y, or Z?
- What obstacles might block acceptance of your preferred option?
- How might we address those obstacles?

Notice that these questions are not asking for information, they are attempting to stimulate others to think more deeply or broadly about the topic. *—Posted by Mitch*

"Behind the 8-ball" and "Throw a curve ball" are definitely slang terms and shouldn't be used unless you really understand the right context for them. It's also important to note that in other cultures interjecting (or interrupting) might be considered rude, so this shouldn't be assumed to be a guideline for non-U.S. cultures. *—Posted by Jodi*

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Stuck in a Meeting from Hell? Here's What to Do

by Melissa Raffoni

We've all been in meetings that seem to go on forever, whether they're being dominated by windbags or bounce aimlessly from one topic to the next. Don't just sit there and roll your eyes. Here's how to take control:

Be brave. Play dumb. Even if you think you know what's going on, you may not really get it or you may sense others don't get it. Consider the power of the statement, "I'm sorry, I'm lost. Can somebody help me understand what problem we are trying to solve and what needs to happen to resolve it? Joe, can you help me out?" The key to the success of this tactic is not your question. It's Joe. The person you appeal to should be one of the strongest communicators in the room. It forces the group to stop and hear clarification from one of the best communicators. It often helps get a group back on track. Playing dumb is pretty smart.

Be a helper. Create shared visuals. Use some technology. Another great question to ask: "Would it be helpful if I took some notes?" Flip open your laptop and take notes on a projected screen. This is much better than using a marker and flip chart, which don't allow for as good group editing and require transcription. Taking and projecting notes serves two purposes. First, it refocuses participants on what they can see before them, which could be a list of questions, decisions to be made, individual commentary, or whatever makes sense.

Second, if you can sort it out, you can use the documentation to drive problem solving. Framing the discussion with a simple outline, such as "Problem, Objectives, Facts, Questions, Action Items, Next Steps," can help move the team from A to B. Better yet, you keep the team from wandering off to Y and Z.

Also, don't neglect to wrap up the meeting without committing summaries and next steps to the document. Now, given your efforts, the group has a working document that serves as a reference for next time. Sounds simple but it works. What's really happening is you're volunteering to do the facilitating that the facilitator has failed to do.

Find the root cause of the meeting's lack of focus, and suggest a solution. Politely observe that "we seem to be spinning our wheels here" and ask what's causing the endless cycles. Sometimes identifying the reason for meetings from hell allows you to refocus them or call a new one to sort through the problem more productively.

A word of caution. Identifying root causes of bad meetings is not always easy, but here are some common examples of barriers that may be making that meeting interminable *and* unproductive:

- **Lack of preparation.** Often, meetings get stuck because not everyone (or no one) has prepared. Let's face it, everyone's busy. Whether that meeting-prep document is sent out early or 20 minutes before the meeting starts, people aren't stopping to read it. Other times, someone conducts the meeting off the cuff or tosses out issues for brainstorming. These approaches waste everybody's time.
- **Who has the D?** Just ask the question, "Who's responsible for this decision?" Ask that person if he is comfortable making a decision, right now.
- **The right people aren't in the room.** Save a meeting from droning on by identifying the people who are needed but absent. "We really can't move forward on this without Jane." Then, cancel the meeting and reschedule it with Jane.
- **The decision maker isn't ready to make a decision.** If you happen to be the decision maker, be bold enough to let the team know your apprehension. It's not a sign of weakness but a sign of courage to say, "I'm not ready to make a decision on this; let me hear what you have to say, and I'll come back to you later." Integrity is paramount. If you make a promise to come back later, let the team know when you will do so and do it.

I know taking some of these steps and saying some of these things when you're not in charge might seem professionally precocious, but they're good leadership and management skills. And if you think you're in the meeting from hell, it's likely many of your colleagues do, too. They'll appreciate your effort to get the meeting back on track.

Posted January 29, 2010
blogs.hbr.org

How to Follow Up After a Meeting

Active and prompt follow-up is the most important thing you can do to make a meeting successful. Meetings that end without communicating an action plan often have no life outside the conference room and are a waste of everyone's time. Why bother assigning action items if no one is really going to act on them?

Develop an Action Plan

An action plan provides closure, a sense of accomplishment, and a map for moving the work forward. A shared document with names and dates makes people accountable, which means any subsequent meetings you have on a given project will be more productive. It also alerts stakeholders to key decisions and helps to ensure that everyone has heard the same message or information. An action plan should have three elements—what, who, and when:

- **What** specific decisions and outcomes resulted from the meeting, and what tasks need to be done as a result of the meeting?
- **Who** is responsible for each task? If meeting participants volunteer to undertake specific actions during the meeting in front of other participants, it's more likely they will complete those tasks. If no one volunteers in your meeting, then it's your responsibility to assign tasks.
- **When** must everyone complete their tasks? Keeping participants realistic about the schedules they commit to helps ensure that they complete their assigned tasks on time.

What goes into an action plan? Detail what was accomplished in the meeting so that someone who wasn't there can understand what happened. The plan should cover:

- Attendees
- Meeting objectives
- Key topics discussed
- Key decisions made
- Next steps
- Who's responsible for each step and by when
- Date of next meeting or follow-up

If possible, fit the information on one page. Send it to all meeting participants and key stakeholders, ideally within one day of the meeting.

Follow Up

Once you've distributed the action plan, check in with folks as due dates approach to see whether they're on track or need you to rejigger the schedule—and the team's expectations. If people don't respond to e-mail nudges, try to catch them at their desks for an update. The more your reputation as an effective meeting facilitator grows, the more likely people will be able to do what they've agreed to do—rather than suffer through a meeting with a lame "the dog ate my homework" type of excuse.

Sample Agenda

Branded Books Meeting: Sales, Marketing, Production, Editorial Team
9/17/10; 10:00–11:00; 307W
Jessica A, Erin B, Lisa B, Mary D, Jane H, Audra L, Sarah M, Alex M, Jen W, Kate A

Meeting Objective: To coordinate our marketing, sales, production, and editorial activities in order to execute on our plan to generate $750,000 in sales of branded e-books across all channels—retail, e-tail, our own website this fiscal year.

What	How	Who	Time
Introduction	■ How did it go? What's the word on the new lines of books?	Mary	5 min
Book revision planning	■ Overarching strategy: Need to revise/refresh before a potential customer picks up the book and says, "Outdated!" ■ Options: ∘ Since book display plans are done 4 months in advance, should the reprint schedule be on a 18–24 month cycle? ∘ Should we coordinate revision schedule with reprint schedule? Do we know reprint schedule far enough in advance—or is that driven by sales? ■ Next steps	Jane Mary group	15 min
Paperback & e-book publication schedule	■ We agreed that we'd offer the e-book and pdf versions of the paperbacks 1 month pre-Bound Book Date, so the first group of 5 will be live and promoted on 2/14/11. ■ How do we develop an informed point of view about e-book/print book publication schedules? How do we gather best practices? ■ Next steps	Mary group	15 min
Pre-sales meeting	■ Scheduled for mid-October. ■ How can the team help prepare? ■ Should we pursue the possibility of pre-loading the 10 Must Reads' first book on an e-reader? ■ Next steps	Jane Mary	10 min
Merchandising idea	■ How about grouping our books by topic rather than by series? E.g., what if we grouped all of our Managing People books together: ∘ 10 Must Reads on Managing People ∘ HBR on Finding & Keeping the Best People ∘ Guide to Effective Feedback ■ Next steps	Jane	10 min
Recap	■ What we decided ■ Next steps—who's doing what	Jane	5 min

Sample Follow-Up Memo

Branded Books Meeting: Sales, Marketing, Production, Editorial Team
9/17/10 **FOLLOW-UP NOTES**
Attendees: Jessica A, Erin B, Lisa B, Mary D, Jane H, Audra L, Sarah M, Alex M, Jen W, Kate A

Meeting Objective: To coordinate our marketing, sales, production, and editorial activities in order to execute on our plan to generate $750,000 in sales of branded e-books across all channels—retail, e-tail, our own website this fiscal year.

What	How	Who	When
Pre-sales meeting	■ Most important meeting in the buying cycle ■ 25 national account reps ■ Loved the jackets! ■ Sell sheets very helpful ∘ Thanks to Sarah, Mary, and Alex for creating them!		
Book revision planning	■ Overarching principles ∘ When a content area (e.g., managing supply chains, doing business in China, marketing) undergoes a sea change, we should be ready to update asap. ∘ The new content in a refreshed book needs to be game-changing. ∘ And we must be sure we're going to sell a lot more of the refreshed book. Otherwise, we'll lose $ on returns. ∘ Need to revise/refresh before a potential customer picks up the book and says, "This is outdated!"	Jane Jane w/ Mary & Jess	ongoing ongoing
Paperback & e-book publication schedule	■ We agreed that we'd offer the e-book and pdf versions of the paperbacks 1 month pre-Bound Book Date, so the first group of 5 will be live and promoted on **2/14/11**. ■ We agreed that we'd use the branded lines as an experiment for figuring out non-traditional digital/print book release, marketing, merchandising.	Jane team	2/14/11
Merchandising idea	■ What if we suggested grouping our books—all of our books, not just the branded lines—by topic rather than by series? E.g., when all six 10 Must Reads are out, as well as the new paperbacks and authored books (e.g., Grote on performance appraisal): ∘ What if we grouped all the Managing People books together, e.g.: ■ 10 Must Reads on Managing People ■ HBR on Finding & Keeping the Best People ■ Grote's new book on performance appraisal ■ In e-tail, we already do this type of grouping (Sarah and Alex), i.e., thematic book lists with focus on core topics. ■ Need to look at Alex/Sarah's e-tail promotion of 10 Must Reads: The Essentials with each author's related books. ■ Also need to take a field trip to some physical book stores—before the winter weather!	Sarah Mary	9/18 10/18

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