

Unconventional Meetings

harnessing informal interactions between formal meetings



Meetings That Work How-To Guide Supplement



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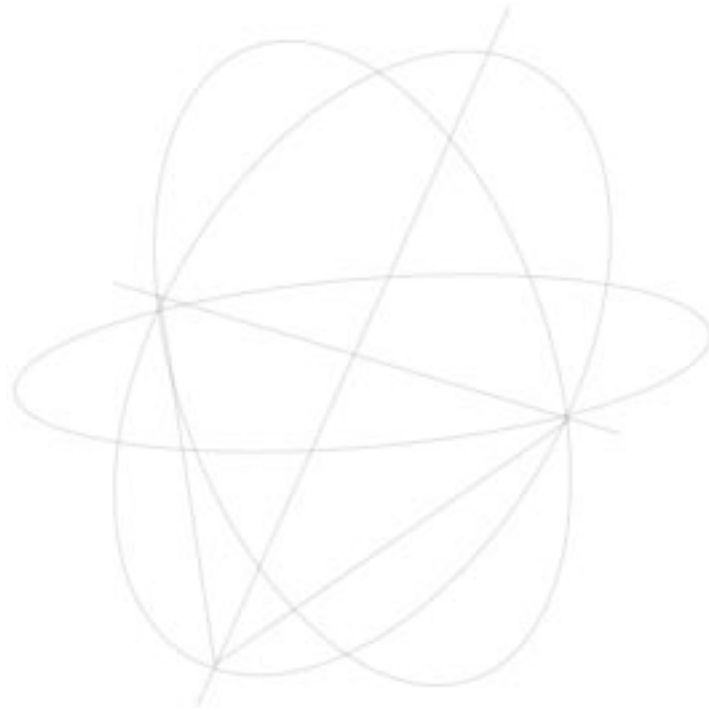
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Unconventional Meetings

In this How-To Guide Supplement, we will apply what we have learned thus far about meeting management and facilitation to unconventional meetings – those that happen informally, spontaneously, in alternative settings, or are enabled by technology.

We will call these unconventional meetings – but this is not to imply that their purpose or content is unimportant, or that the process, principles and personal skills we have been studying are any less applicable. On the contrary, unconventional meetings are critically important to the success of projects, departments, or the organization as a whole. And if anything, we need to be even more vigilant in our application of facilitative skills in such meetings, in order to ensure their success.



Unconventional meetings occur whenever two or more people communicate towards some end. They are the informal or spontaneous meetings that occur every day at the office or in any place where people meet: the park, gym, or supermarket. They are the meetings we have on our cell-phones, by video-conferencing or through e-mail.

The overall purpose of this section is to encourage you to think and act like a facilitator whether or not you are in a traditional meeting setting, and to think in terms of the formal meeting process even when flip charts, easels and comfortable chairs are not available.

Overview of Section

- Types: Face-to-Face and Technological Assisted
- Benefits and Cautions
- Critical Minimum Standards for your informal meetings

TYPES

TYPES OF UNCONVENTIONAL MEETINGS

1. Face-to-Face Meetings

Informal, spontaneous, face-to-face meetings occur on a daily basis for most of us. They can take place both in traditional work settings, and anywhere we happen to meet others. Below are some examples of the numerous possible settings for such meetings.

At Work

Cubicles, offices, conference rooms, sales floor

Hallway, elevator, copy room, water cooler, coffee machine, cafeteria

Restroom, Smoking room or outside on a smoke break

In Work-Related Places/Activities

Sidewalk by office, parking lot

Lunch, after work at bar, parties, networking events

Health club, gym, golf course

Traveling – car, plane, hotel lobby

Pretty Much Anywhere

Grocery store, front yard, social gatherings, park, kids' events, etc.



2. Technology Assisted Meetings

Examples of technology assisted meetings are those that occur by phone, cell-phone, e-mail and video-conferencing.

BENEFITS AND CAUTIONS

UNCONVENTIONAL MEETINGS: BENEFITS AND CAUTIONS

Benefits of Unconventional Meetings

- √ Informal meetings provide more options and so enable more work to get work done
- √ Critical communications occurs that are immediately necessary for people to proceed with the work at hand. This may take the form of information sharing, and/or agreements and decisions.
- √ Informal meetings can encourage creativity and openness They cause people to share their ideas spontaneously – whether by phone, one-or-one or in a casual group setting.



- √ Because of their spontaneous nature, informal meetings can increase efficiency – shorter + less planning = more gets done.
- √ Unconventional meetings often have fewer attendees, fewer and/or simpler topics, and a less structured process. This can result in a greater focus and efficiency: more gets done in less time.
- √ Unconventional settings and circumstances often promote bonding, networking, teamwork and overall development of working relationships. Unconventional meetings help to create and cultivate relationships between people. These connections – both on the social and work level –make work a more enjoyable and productive experience. In addition, they can lead to increased camaraderie on the team, departmental and organizational levels.
- √ Informal, especially more private settings allow for greater privacy, attention, and increased personal comfort. Sometimes confidentiality is required for open communication, people may need one-on-one attention, and/or feel more comfortable when in a casual setting or using the phone or e-mail.



Cautions When Employing Unconventional Meetings

Unconventional meetings of both types – face-to-face and technology assisted – have a number of drawbacks.

Lack of Planning and Structure

√ Often, (though not always), these meetings occur spontaneously, with little or no planning, and in settings or through mediums that may create communication problems. These and other characteristics of such meetings can lead to a variety of problems: both in terms of people, process and outcomes. We detail some of these issues below.

√ No preparation. When there is no advance notice of the meeting, participants may be caught off guard, surprised, unnerved, reluctant or simply just not ready to meet. Lack of proper preparation can lead to numerous other problems, listed below.

√ Lack of clarity on purpose and process. The meeting purpose, desired outcomes and process may be poorly defined. This results in ineffective communication and failure to reach real understanding, agreements or decisions.

√ Not enough time or wrong time. Topics are rushed, understanding and agreements shaky. Possible failure to record key points or follow through on action items.

√ Wrong location. Too public, noisy, or otherwise distracting, which can contribute to all problems listed above, under “Lack of clarity . . .” and “Not enough time.”

√ No decision-making authority. Participants may inadvertently think they have authority to make a decision when they don't. Even if they realize they lack the authority, inability to make the decision may make meeting pointless.

Location-dependent attendees

√ Different people will “end up” at informal meetings, depending on the setting. An obvious example is meetings in bathrooms will be gender specific. Meetings in smoking areas will exclude nonsmokers, meetings in gyms will exclude those who don't work out or do so elsewhere, meetings on planes and in hotels exclude those who don't travel, and so on.

√ Incomplete attendees. If key people are missing, then input may be lacking which in turn makes it difficult or impossible to reach complete understanding and agreements, or make decisions. In addition, those missing may find out about the meeting and feel left out or shut out. This can lead to misunderstandings, resentment and rumors.

√ Inappropriate attendees. Sometimes business is covered in the presence of others when really, it is not appropriate for them to be there. It may be sensitive or confidential information, or it might simply be impolite to discuss in this forum.

Other Missing Meeting Protocols

√ Poor recording. Usually recording is minimal. Possibly there will be no recording, which decreases the likelihood of shared understanding over time about what happened at the meeting, and as well, makes it harder for participants to follow through on action items.

√ Shaky results. All of the above qualities of informal meetings may mean it will be difficult to reach clear understanding, agreements and decisions, and generally less will be accomplished.

√ Failures to follow through. Action items may not be recorded, participants forget to follow through. Also, information may not be shared with all appropriate people following the meeting.

Factionalism and Divisiveness

Unconventional meetings are sometimes held for subversive purposes – for example, to reinforce differences and increase factionalism at the expense of collaboration. Of course, there is nothing wrong with venting frustrations or caucusing to work through issues behind the scene. However, when “clandestine” meetings are held with the intention of increasing polarization, they are destructive rather than constructive. If you (as member and certainly as facilitator) are attending a meeting that feels intentionally divisive, consider the consequences before you participate.

TECHNOLOGY

Issues Specific to Technologically Assisted Meetings

PHONES

Benefits	Cautions
<ul style="list-style-type: none"> · Location is not an issue · Save time, money · Real time interaction · All participants present at same time · Best substitute for face-to-face 	<ul style="list-style-type: none"> · Noise and other distractions · Introverts left out · More difficult to hear · No visual connection with people: facial expressions, body language lost · No visual connection with materials · Silence can = checking out · Technical difficulties

E-MAIL

Benefits	Cautions
<ul style="list-style-type: none"> · Location is not an issue · Saves time and money · Communication is documented · Useful when issue is not time-critical and do not want to interrupt recipient by phone, or in person · Preferred mode for some people · Useful for technical information dump · Written may be better than spoken · Can help overcome language barrier 	<ul style="list-style-type: none"> · Difficult to follow threads · Disjointed access · May have no effect · Miscommunication due to lack of voice and visuals · Chatty · Easy to delete · Confidentiality issues · Technical difficulties

MINIMUM STANDARDS

VIDEO

Benefits	Cautions
<ul style="list-style-type: none"> · Visual connection with people: non-verbal communication · Visual sharing of materials slides, overheads, etc. · Politics, nicety, formality, intimacy · Time to plan 	<ul style="list-style-type: none"> · Difficult set-up · Distractions with set-up · No physical presence · Mute but visual · Technical difficulties · Restricted, inflexible views

CRITICAL MINIMUM STANDARDS TO MAKE YOUR UNCONVENTIONAL MEETINGS SUCCESSFUL

- √ Purpose and Desired Outcomes: Identify purpose and desired outcomes by asking, “why are we meeting?” and be sure everyone understands and agrees. It is important to stay focused on this throughout your meeting!
- √ Time: Do you have enough time to accomplish your purpose?
- √ Place: Is this an appropriate place to meet? Perhaps simply stepping off to one side or finding a nearby empty conference room is possible.
- √ Attendees: Are the right people here to accomplish your purpose? If not, can you find them or should you postpone your meeting?
- √ Agreements: Make agreements with caution, considering you may be rushed, distracted, have incomplete information, be missing key people, lack authority, etc.
- √ Recording: Record all action items, putting a name to them, and by what date they will be accomplished. Be sure to communicate key take-aways with those whom you wished had been present.

For more information related to unconventional meetings, see the How-To Supplement entitled “Thinking, Speaking, and Acting Like a Facilitator” which is located in another. It provides you with specific language to use in your informal settings.

SERIES DESCRIPTION

Meetings That Work How-To Guides

This Series of Healthy Systems How-To Guides focuses on managing and facilitating effective, efficient and collaborative meetings. The Guides in this series consist of 1) The Process and Tools for running a meeting, 2) The Principles and Mental Models that underlie and support the Agenda, 3) The Personal Skills and Practices that help all members of the team artfully navigate unique and challenging situations and 4) Special Topics including Strategic Situations and informal or Unconventional Meeting formats.



Process: Before, Start, During, End and After

The first section of this manual lays out a step by step PROCESS for running an efficient and effective meeting. This section comprises the obvious things we do to plan and run a meeting. It begins with what needs to be done Before the meeting, then discusses what happens at the Start, During and End of a meeting, and finally, what needs to be done After a meeting. In addition, the basic tools needed to successfully complete each phase of the meeting process are presented and explained.



Principles

Underlying the basic meeting process and tools is a set of PRINCIPLES upon which all successful meetings depend. These will be discussed in the second section of the manual. Principles may be thought of as invisible mind sets, mental models or truths. They are the foundation upon which the process lies, and also the conceptual ground or framework which supports meeting facilitators, leaders, or members, in their effort to help the meeting process run smoothly.



Person

The final section of the manual focuses on the PERSON who is facilitating the meeting. Successful meeting management and facilitation requires more than a knowledge of process and principles; it requires a set of personal skills - mind and heart-sets, if you will, and a belief that who and how we are effects those around us and their capacity to work well as a group or team. The PERSON section focuses on the less tangible qualities of a successful facilitator.

The Series as a whole provides experienced facilitators, would-be-facilitators, meeting leaders and members alike a thorough framework for mastery: the process steps, the tools, the truths and models and the personal practices to run or effectively participate in meetings. This series of self-contained guides will help you become an astute diagnostician of meetings - to recognize if a meeting is going poorly or well and why. In addition, it will provide you with increased choices and options to help make your meetings more effective.

We focus on the role of the facilitator in particular but the information in this Series can be used by anyone who participates in meetings of any type and in any setting. Whatever your particular interest is, we hope you find it helpful.

Healthy Systems Product Guide

You have just completed one in a series of the How-To Guides. All of our How-To Guide are aligned with Healthy Systems' leadership and management model. The table below and the graphic to the left place this Guide into a broader context and provide a sampling of the topics covered in other **Healthy Systems products**.



Content	Process - steps	Principles - guidance	Person - Audience
Identity and Direction	Steps include Strategic purposing, planning and contextual analysis.	If you don't know where you are going, any road will get you there. Identity is self-organizing.	Executive Leadership Leaders at all levels Management
Process Design	Define, Map what is, Evaluate, Redesign, Test and Standardize To	Processes are designed to serve the goals and strategies of the organization.	Operations Managers Quality Improvement Teams
Project Management	Define, Plan, Start, Execute, Close	Cross boundaries judiciously	Project Managers Teams
Meetings	Start up through Wrap up	First Understanding and then agreement	Facilitators Teams
Relationships and Teams	Establish intention, connect, communicate, collaborate and keep conflict productive.	Relationships are the most personal and meaningful way to practice integration and alignment.	All people, all positions
Culture	Design it, Align it through story telling,, surface assumptions, reinforce and celebrate	Surface assumptions Define Values Create heroes that define your ideal culture.	All people, all positions
Corporate Wellness	Steps to take to create a wellness initiatives in your company, including wellness goals and metrics in your strategic plan.	There is a reciprocal relationship between the health of the organization and the well being of the people who work there.	All people, all positions
Design and Change	A developmental model to navigate change. Involving, designing,, bridging gaps, maintaining relevance, redesigning, and diffusing	Structure dictates functioning	Organization Development Leaders at all levels Managers
Healthy Organization	Integrating all the processes above and knowing how they work together to create and sustain vitality.	Focus on flow, integration and alignment. Release tensions and bottlenecks.	Organization Development Leaders at all levels Managers

About Healthy Systems

Healthy Systems is a management consulting firm that aligns and integrates the people, processes and strategic directions of an organization—for the health of the organization and the well-being of its employees.

We train and coach organizations in the dynamics of complex systems and in the skills, tools and strategies for creating and sustaining a vital and balanced workplace.

Healthy Systems works in collaboration with organization development and training specialists to meet your specific and customized needs.

Healthy Systems provides consulting and customized training for organizational effectiveness, focusing on methods to create and sustain vitality and relevance in meetings, projects, processes, planning and interpersonal relationships.

About Sara Grigsby



Sara Grigsby has worked professionally as an organizational development consultant, trainer and facilitator since 1985, providing project-based management, coaching, training and event facilitation services to a variety of corporate, public agency and health care clients. Sara is the founder of Healthy Systems and its lead consultant.

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