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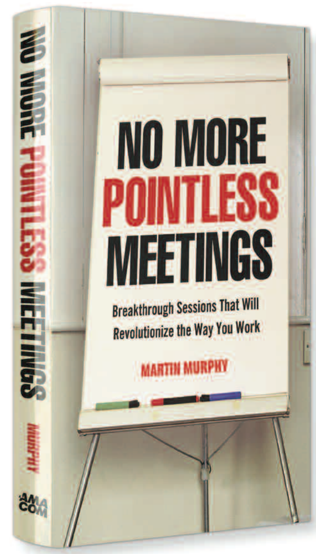

No More Pointless Meetings

Breakthrough Sessions That Will Revolutionize the Way You Work

by Martin Murphy

THE SUMMARY IN BRIEF

Meetings are the bane of work life: time-consuming and inadequate for addressing today's innovation and speed-to-market imperatives. Everyone grumbles about them, but nothing ever changes — until now.

Martin Murphy has helped dozens of corporate clients transform conventional meetings into workflow sessions that are truly productive, by reframing workflow management issues into four critical activities: Issues Management, Innovation, Problem-Solving, and Ongoing Planning. By doing so, he has upended the entire concept of the one-size-fits-all traditional meeting model and has set a new standard for collaborative results.

No More Pointless Meetings gives you workflow management tools to dramatically improve both in-the-flesh and digital collaboration by leveraging the cognitive and creative potential of the individuals who report to you.

IN THIS SUMMARY, YOU WILL LEARN:

- How to use action plans to improve cognitive and creative productivity in a way that ensures early ownership of issues, accountability and transparency.
- How to deploy three fast-track collaboration sessions: issues management, innovation and problem-solving.
- How to stay current with exponential change by installing an ongoing planning system and a planning database.
- How to use information gaps to upgrade your organization's IQ.

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THE COMPLETE SUMMARY: **NO MORE POINTLESS MEETINGS**

by Martin Murphy

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For additional information on the author, go to www.summary.com.

Why Meetings Fail: Reframing Workflow Management

Meetings have survived as the primary collaborative process because it is assumed that an individual, once promoted to a leadership position, already knows how to effectively leverage human capital. The facts don't support this — all of us still get trapped in meetings that squander time we'll never recover. While the number and complexity of issues that require resolution accelerate, unsatisfactory meeting outcomes are still an everyday event.

For most executives, managers and supervisors, the meeting is the only work management tool they've ever used for collaboration. The drill is ingrained: Everyone gathers in a conference room, and the most senior executive both conducts and participates in the meeting at the same time. This wasteful collaborative ritual takes place millions of times daily in organizations around the globe. And while its shortcomings are acknowledged, it has been the principal means for collaboration over the course of many generations.

If managers are doing a poor job of collaborating in person-to-person gatherings — and be assured that they are — digital collaborative performance will be even less effective.

Guiding Principles

Reframing workflow management activities into four broad categories of need transforms the effectiveness of workflow management in general and collaboration in particular. Those categories — the need to manage issues, to solve problems, to innovate and to plan — yielded the following collaborative elements of a workflow management system:

1. The Issues Management Session
2. The Innovation Session
3. The Problem-Solving Session
4. Ongoing Planning.

The fourth element, Ongoing Planning, provides the means to capitalize on exponential change by building speed-to-market capabilities.

There are, however, two principles on which all of these sessions are based:

1. Content and process must be kept separate.
2. The boss (or highest-ranking person in the room) should not run workflow management sessions.

Separate Content and Process

The core elements of all interpersonal communications are content and process. Content refers to what's being discussed, the subject or purpose for having a meeting in the first place. Process refers to virtually everything else, for example, Who's talking the most? How's the energy level in the room? Is there a spirit of openness and teamwork? Are things getting accomplished?

Collaboration is transformed by the simple act of keeping content and process separate. Facilitators don't participate in content discussions. Their job is to handle process only and to do so in a manner that motivates all participants to contribute to the maximum of their ability. At the beginning of every workflow management session the facilitator needs to get three agreements from the group:

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1. The facilitator accepts responsibility for meeting process.
2. The group accepts responsibility for meeting content.
3. Both the facilitator and the group commit to an outstanding workflow session outcome.

The Issues Management Session

Issues constitute the dynamics one is responsible for managing. This includes anything related to the welfare of the organization that requires attention, something that needs to be resolved, a trend to explore, an opportunity that could be exploited or a problem that needs to be solved. An issue might be relevant only to one's job or it might be something bigger that affects the entire organization, the competition or the industry in general.

Issues have differing degrees of importance: The most important are classified as Critical Issues and require immediate attention or resolution. The timely assessment of all issues minimizes the numbers that become critical.

The Issues Management Session enables you to comfortably handle expanding workloads and streamline day-to-day workflow management. All group workflow sessions require three easels with large paper pads, colored markers for the facilitator, and writing pads and pens for participants. Here are the steps for conducting an Issues Management Session:

Step One: Laying the Groundwork. The most important step in any workflow management session is how well one explains the difference between conventional meetings and workflow management sessions and the concepts of content and process.

Once you have clearly established an agreement on the different roles, write the heading "Information Gaps" on one of the easels. In any collaborative work session there are many questions that emerge during the process. In some cases, the questions are answered during the session; in other cases, these Information Gaps have to be filled after the session. Explain to the participants that you will record all the unanswered questions that pop up during the session.

Step Two: Identify the Purpose of the Session. Once you have the groundwork laid and the logistics in place, the next step is to define the purpose of the session. Don't launch into a session unless all participants have a clear understanding of the purpose of the session.

Step Three: Surface All the Issues. Once you have an agreement on the purpose, the next step is to surface all of the possible issues related to the purpose of the session. Instruct the participants to write "Issues" on their personal writing pads and, without discussion, to write down all of the issues they think must be addressed.

Step Four: Narrow the List to Critical Issues. Ask participants to identify the five issues they think are the most critical, and give them five minutes to do so. Then go around the room taking no more than two critical issues from any one person at a time, and display them (in a small group, I'd take only one at a time). Usually, there is some overlap, which you can handle by adding a check mark to an issue that has already been submitted. Remember that all of this is done without discussion.

Step Five: List the Top 10 Critical Issues. Once you have compiled your list of Critical Issues, break the group into teams and ask them to come up with their top 10 Critical Issues, within five minutes.

Now is the time to get a consensus on the Critical Issues. Address the group as follows:

I'm going to point to each issue, and I'd like you to rank it in terms of its importance. Give it a score of 3 if you think it needs to be resolved immediately, a score of 2 if it needs to be resolved soon, and a score of 1 if it can wait to be resolved until the 3s and 2s are handled.

Accord each issue a number of check marks corresponding to each person's score for that particular issue (a score of 3 gets three checks, etc.).

Count the number of check marks for each issue and record each total with a colored marker. You now have a ranking, which establishes the sequence we'll use in addressing these issues.

Step Six: Resolve the Issues or Move Them to Another Session. Some of the Critical Issues on the list can be resolved in-session. Others are more complicated and require that actions be taken out of session. Some defy any kind of resolution in the Issues Management Session and require a Problem-Solving or Innovation Session. Your goal is to help the group identify which of the issues can be resolved in-session and provide the Next Steps for those issues that can't.

On one of your easels, write "Action Plan," point to the first issue and ask the group:

Can Critical Issue No. 1 be resolved right now? Take three minutes to decide, as a group.

The objective is to facilitate group discussion about the resolution of Critical Issue No.1. If the group seems to be making headway, let them run with it and stay out of the way. If after about three minutes they seem to be stymied, however, intervene with a process suggestion: to schedule the issue for resolution via a Problem-Solving or Innovation Session, and then direct the group to the resolution of Critical Issue No.2.

By resolution, I mean that the group agrees on what the Next Steps should be, they have identified who's responsible for making this happen and they have established a deadline.

Step Seven: Write the Action Plan. All workflow sessions conclude with an Action Plan. Action Plans serve as the means to record the conclusions that were drawn, the solutions that were identified and the agreements that were made in any work session. An important function of Action Plans is that they ensure outcomes are implemented in a manner that optimizes accountability, transparency and speed-to-market performance. An Action Plan consists of four vertical columns:

1. Tasks/Next Steps. This column covers the nature of any issue's disposition, so it should be wide enough to accommodate descriptions of related tasks and spin-off activities.

2. Responsibility. The names of the individuals who have been assigned particular responsibilities are recorded. It's important to be clear about who is responsible for each step.

3. Due Date. Delay entering any dates until all other aspects of the Action Plan have been completed. This gives individuals who have volunteered to complete more than one assignment the opportunity to review the full list of their commitments and agree to realistic delivery dates.

4. Report. This column identifies the individual(s) to whom task results will be submitted. As a general rule, it's good practice to inform all participants of all task outcomes. However, there may be circumstances when this includes an individual who did not attend the meeting — perhaps a particular executive whose authorization is required to move things forward.

The Innovation Session

The Innovation Session is the work management session to use when you want to tap into the creative potential of a group. It has many applications, and use of it is indicated when any of the following needs are identified:

- Development of new products or services.
- Upgrade of systems and procedures.
- Streamlining of intradepartmental communications.
- Identification of alternative marketing strategies.
- Development of a name for a new product, service or initiative.
- Identification of a unique promotional idea or initiative.
- Jump-start of a stalled Problem-Solving Session.

An Innovation Session comprises four phases: Ideation, Building, Evaluation and Action Plan.

As with any workflow management session, begin an Innovation Session by clearly explaining to participants the difference between a conventional meeting and a workflow management session; then clarify the difference between content and process.

Purposefully state the goal as broadly as possible, and then ask the group if they agree with your interpretation. Without making it a drawn-out affair, allow them to guide you in rewording the statement if necessary.

Phase One: Ideation. In a roomful of people about to tackle the task of creating new product ideas, be assured that most of them already have some new product ideas in their heads. As in the Issues Management Session, you need to get those ideas out of their heads and onto paper as quickly as possible. Write "Ideas" on an easel and instruct the group as follows:

Our goal is to generate new product ideas. Most of you have some ideas already, and we want to capture all of those before we continue. With that in mind, and without discussion, would you please write as many new product ideas as you can. Absurdity is encouraged. Forget viability for the moment and strive for quantity of ideas. You have three minutes to do this.

At the end of the first three-minute period, instruct the group to stop writing. Go around the room and ask each participant to read aloud one or two of their ideas.

Don't take more than two issues at a time — especially with a large group. The reason for taking only two ideas from each person is that many people have similar ideas and by the time you get to them they complain that all of their ideas have already been boarded.

Once participants have identified concepts that appear to have strong appeal, guide them in ranking these concepts in terms of their viability.

By now the group is a bit more relaxed with the process, and their imaginations have been stirred by the ideas of their colleagues. To capitalize on this, ask participants to take another three minutes to use the ideas displayed on the walls to trigger additional new product ideas.

Now you have a decision to make: Do you go for a third round of Ideation or switch gears? This is a judgment call based on your feel for what's left in the group's creative tank.

Phase Two: Building. The strategy of the Building phase is threefold:

1. Focus on ways to make ideas work.
2. Avoid any discussion about why the ideas might not work.
3. Convert raw ideas into concepts.

The difference between a new product idea and a new product concept is in the degree of completeness. A new product idea is often just a bare-bones hunch or an inkling of what might be possible; a new product concept, however, is an idea that has been fleshed out. Often a new product concept reveals itself when several ideas are combined or when a value-added feature is integrated with an existing product or service. A new product idea usually needs more attention (building) before it is considered viable. Sometimes raw ideas are exposed in focus groups to find that missing piece of the puzzle that promotes a new idea to concept status.

For this step, again break the group into teams. The assignment for each team is to use the ideas displayed on the walls to build discrete new product concepts — concepts that the teams believe their organization could market successfully. The teams get 15 minutes to agree upon 10 new product ideas.

Phase Three: Evaluation. The Evaluation phase moves the participants from a focus on creativity to a focus on possibility and potential. The goal of this phase is to evaluate each concept and identify those that are most likely to be successful.

Once participants have identified concepts that appear to have strong appeal, guide them in ranking these concepts in terms of their viability. Specifically, ask them to take a sheet of paper and, without discussion, to list their top 10 new product concept choices. Give them 10 minutes to do this.

Phase Four: The Action Plan. The final step in the process is to develop an Action Plan to document the Innovation Session output in an actionable format with Tasks, Responsibilities and Due Dates.

Once the top new product concepts and Information Gaps have been accounted for in the Action Plan, you have completed the Innovation Session.

The Problem-Solving Session

The Problem-Solving Session produces transformative outcomes because it's an innovation-driven process; we don't try to cognitively hammer out solutions. Instead, we create an environment that entices the solution to reveal itself. This process upgrades the ability of a group to solve problems utilizing a unique blend of cognitive and creative skills.

The following is a partial list of specific needs that would benefit from the use of a Problem-Solving Session:

- Obtaining input from key individuals with regard to a specific problem, such as a systems and procedures upgrade.
- Enabling managers and supervisors to operate from a unified strategic perspective.
- Fostering earlier ownership for issues across departments and disciplines.

Step One: Laying the Groundwork. As in all work sessions, the first step is to establish an agreement with the group regarding your role and theirs. Emphasize that you are responsible for the process — structuring and guiding them through the session — but they are responsible for content.

Step Two: Identify the Problem. The next step is to identify the core problem that will be at the center of the session. Begin by writing your understanding of the problem on an easel. Then, guided by the group, edit your description of the problem to the satisfaction of the group. Don't strive for perfection — it isn't necessary at this point. Your goal is to get general agreement that the problem statement is in the ballpark of reality. In a normal situation, try not to spend more than five minutes on this step. Sometimes it helps if the group attempts to simplify what appears to be a complex problem by breaking it down into a set of smaller problems that might be easier to solve.

Step Three: Reframe the Problem. As mentioned previously, the Problem-Solving Session depends as much on creative thinking as on cognitive skills, such as the ability to analyze data and form rational and logical conclusions from that data. The process for resolving problems, therefore, includes a number of creativity exercises.

The first is the What-If Exercise. This exercise allows the group to uncover different facets of the problem and, in the process, some possible solutions, by turning the core problem into a "What if … ?" statement.

Once the group has agreed on the core problem, ask the participants to take five minutes to write as many interpretations of this problem (or its solution) as possible, without any discussion among themselves. They have only five minutes for the exercise. At the conclusion, ask each participant to share his or her list.

Step Four: Ask for Solutions. Once you've conducted several rounds of the What-If Exercise and have identified some of the roots of the problem you are addressing, you can make your first request for solutions. Instruct the group to write three possible solutions to the problem, without discussion. Give them five minutes for this exercise.

When their time is up, go around the room and display one solution from each person. When all of the solutions have been displayed, ask the group, "Do we have a solution to the problem?"

If any group indicates that they've found a solution, display it, with the group's editorial input, and determine whether there is consensus. If there is agreement that a solution has been found, you can proceed directly to Step Six: the Action Plan.

Step Five: Expand the Search. A solution rarely presents itself from the first request. More likely, a series of creativity exercises — including the vitally important Question Exercise — will be necessary before the group can identify a solution or solutions. Ask each participant to write the word Questions at the top of a sheet of paper and respond to the following: What question do we need to ask ourselves at this time? Give the group three minutes then take one question from each person. Without addressing the questions instruct the group to write a better question. Give them one minute. You now have a list of many questions that are related, in varying degrees, to the problem. Asking for a better question is a key element of this exercise. Board these questions. Resisting the urge to address any of them, push the group into a third round. You'll notice that the questions become more solution-oriented and that Information Gaps begin to sprout. With each series of questions, the group moves closer to the solution.

Step Six: The Action Plan. As with the Issues Management and Innovation sessions, it is vital to capture all of the Information Gaps, Conclusions and Next Steps from the session into an Action Plan. This provides transparency and responsibility and ensures ownership of issues.

The Ongoing Planning Process

To stay current, innovation and speed-to-market capabilities must be valued as core competencies and the ability to leverage human capital more effectively must be a strategic imperative.

Bottom line, to be effective in the digital age, the time span between planning and implementation must be minimized. Accomplishing this has to be an ongoing process that (1) capitalizes on the interconnectivities created by technologies and (2) maximizes speed-to-market capabilities.

This has created the need to reframe the planning function from a scheduled event executed by a few to an ongoing process that involves many in order to leverage the cognitive and creative capabilities of in-house talent, to stay current in the face of exponential change, and to shorten the timeline between intentions, strategies and implementation.

Effective Ongoing Planning is driven by three interrelated dynamics:

1. Innovative Collaboration Practices
2. A Robust Planning Database
3. Personal Workflow Planners

Innovative Collaboration Practices. Outcomes from the three collaboration sessions (Issues Management, Innovation and Problem-Solving) in the form of Action Plans are fed to a Planning Database at the conclusion of every workflow management session. This process creates critical-path transitioning from collaboration to Ongoing Planning.

A Robust Planning Database. The Planning Database is fed, primarily, by Action Plans and functions as the intelligence nerve center of the organization. Action Plans, in turn, function as the cohesive factor for Ongoing Planning, since they reflect and document outcomes from all workflow management sessions that occur within the organization.

The architecture of the Planning Database is customized to enable senior management to identify and assess interconnectivities, patterns and trends in a variety of contexts and to monitor both the workflow of the organization and the heartbeat of the marketplace in real time. The Planning Database also functions as sonar for pre-emptive opportunities.

A planning coordinator monitors the database. This individual's job is to extrapolate strategically pertinent information from the Action Plans and other sources of competitive and market data. All managers utilize the database to identify collaborative opportunities and interconnectivities that create value and to ensure they're operating from a unified strategic perspective. Input by individual managers is encouraged in the form of Information Gap queries, initiative updates, intradepartmental task and project coordination, and so forth.

As a learning and training resource, the database is invaluable.

The Ongoing Planning Database is a vital component of best workflow management practices for two reasons: It is comprehensive and it is ongoing.

Personal Workflow Planners. Workflow planners are used by managers to handle expanding personal workloads and to streamline workflow management practices. The planners enable managers to maintain a strategic perspective as they manage issues. Workflow planners are not submitted to the planning database. They are personal workflow tools that managers may customize to fit their individual leadership styles.

One-on-One Sessions

While the cornerstone workflow management sessions are utilized primarily for team collaboration, they can also be used to upgrade the effectiveness of one-on-one collaboration.

One-on-one collaboration is the established approach for activities such as performance feedback and compensation discussions. However, it can also be quite effective as an alternative to meetings for many workflow management tasks.

A one-on-one session can be used to resolve a large number of issues expeditiously with another individual. It can be conducted on the spur of the moment and the human capital investment is minimal. The process can be as effective digitally as in person and it can serve as a means to introduce another person to the Issues Management Session.

Usually, you get the most out of an Innovation Session when it's done with a group. However, there are times when you want to simply explore some possibilities with a colleague informally.

The one-on-one Problem-Solving Session is a work management session that two people can utilize to solve problems effectively. While it's not expected to produce the large-caliber results of a formalized group Problem-Solving session, it can be relied upon to deliver solutions on a sustained basis with an economy of human capital, and it will produce better results than conventional problem-solving efforts.

Your instructions in a one-on-one session should be as precise and crisp as if you were leading a 15-person group Problem-Solving Session. Stay on-purpose and move things along at a challenging pace. Remember, the dynamics of the facilitator role are consistent, regardless of the type of work session you're conducting.

Solo Sessions

To run a productive solo workflow management session, you must be able to separate process from content without the benefit of a facilitator and be capable of switching back and forth in the alternate roles of facilitator and participant without getting lost in content. This means you adopt the role of a bridger, one who can do both. (This is one of the reasons that I strongly recommend you acquire experience in facilitating group workflow sessions before you make use of their corresponding solo versions.)

The solo issues management process enables you to quickly identify all Critical Issues, resolve those that you can, and be certain about which issues would best benefit from delegation or collaborative attention.

Once you're familiar with the group Innovation Session, the solo version enables you to tap into your own creative potential between collaborative sessions.

Solo problem-solving can be an economically sound alternative to group sessions. Just because you have the ability to leverage the cognitive and creative capital of others to solve problems doesn't mean you should always opt to do so. Once you acquire the skill to facilitate workflow sessions, you can choose to resolve many problems independently.

Making It Happen

Ideation is a tool for accessing and leveraging the creative potential of individuals and groups. It's an integral part of all the workflow management sessions. Most managers justify their lack of attention to this issue by citing demanding workloads of a more "pragmatic" nature. However, the pace of innovation set by the technological evolution puts enormous demands on leadership in other industries to stay relevant.

Here are some reminders about how to get the most out of the innovation processes you've already learned:

Lead by example. It's up to you to set the tone for upbeat, enjoyable and productive workflow sessions. You need to show up looking well-rested and filled with positive energy. This attitude is contagious, so let the group see that you are enjoying yourself.

Validate. Expect to do a lot of encouraging and validating. Your role is to orchestrate a roomful of mainly pragmatic minds to switch mental gears and tap into their creative capabilities. For many people, this is a new and potentially exciting experience.

Expect success. As a facilitator, you need to remember a very important fact: There is enough intellectual and creative talent in the room to solve any work-related problem and identify a billion-dollar idea. Your job is to convince the participants of their unused creative potential and to provide them with the environment and the collaborative tools to access it.

Always be asking. In sales, it's a well-known fact that the most successful salespeople don't hesitate to ask for the order; they're "always closing." Similarly, you should always be asking for new ideas. Don't get so wrapped up in the excitement of the session that you forget your purpose: to elicit innovative ideas and breakthrough solutions.

Handle the chaos. A hardworking group often becomes so loud and excited that the session appears to be chaotic. Properly guided, the moment that seems most chaotic can also be the most productive point in the session. As you gain facilitator experience, you'll be able to create the right balance between chaos and structure.

Stay tuned in. Always be tuned in to the energy level of your group and allow yourself to be influenced by them in terms of when to take breaks, which Ideation exercises to select and how long sessions should last. You are there to enable the participants to exceed their normal collaborative performance. How you collaborate with them dictates how well they collaborate with each other.

Clarify instructions. Continually ask the group whether there is anyone who does not understand an instruction before you direct them to begin a new process or cycle. If you don't, you're likely to experience interruptions midcycle by participants who are uncertain or confused. This slows down the pace of the session and deflates the energy in the room.

Maintain speed. Speed plays an important role in all workflow management sessions because it creates the tendency to bypass rational thought; it doesn't give participants the time to settle into their cognitive comfort zones. So make your instructions to the group precise and to the point. Doing so short-circuits rational thought processes and, in their place, encourages uncensored creativity.

Refrain from judging. Be extra firm about refraining from evaluation during an Ideation phase. By instructing a group to strive for quantity of ideas, you deny them the time to indulge in self-censorship and evaluation.

Free their minds. Most participants in an Ideation exercise already have some ideas in mind before the start of the process. You need to get all of these ideas and opinions out of their heads and onto paper as quickly as possible. Otherwise, those ideas will prejudice and contaminate their contributions throughout the session.

Restrict discussion. By restricting discussion during most sessions and exercises, you intensify individual focus, build the desire to collaborate and minimize distractions. Make sure the group understands that there will be time allotted for discussion in every session.

Encourage laughter. Laughter helps release pent-up stress and enables enjoyable creativity. In general, the more laughter there is in an Innovation Session, the better the results.

Maintain control. Stay in control of the group. It's a big part of your job. You've probably noticed an apparent paradox here: You're imposing structure to enable the group to be creative. It works.

Stand up. Always conduct workflow management sessions on your feet. Motion generates energy. One of the hallmarks of the conventional meeting model is that everyone is sitting down. Some are asleep.

One of the many ways to keep a group involved is to conduct some exercises while participants are standing instead of sitting.

Don't comment. If you comment on the quality of any idea offered by a member of the group, it has an undermining effect on productivity. By all means, feel free to ask for clarification to make sure you're boarding a person's idea accurately.

Be assured that the window of innovative opportunity is normally quite short before individuals relapse into habitual thinking patterns. One of your primary responsibilities as a facilitator is to create an environment that makes it easy for people to break out of their habitual thinking patterns at will.