P2E
From Practice to Experience

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How to Make Meetings More Effective

Project meetings are excellent opportunities to combine the benefits of personal communication and formal impersonal communication. Meetings are a place for personal interactions. Documenting the outcome of a meeting by writing meeting minutes or updating design documents enhances the effectiveness of the work accomplished in the meeting.

Making Meetings a Valuable Communication Tool

Effective meetings have several things in common:

1. The needs of each participant are met.
2. Concerns important to the group as a whole are addressed.
3. The purpose is clear.
4. The atmosphere is comfortable.

The following activities will help you make your daily meetings more effective. They will be discussed in more detail below.

- **Identify the purpose of the meeting.**
- **Define the deliverables or work products of meetings.**
- **Create an atmosphere for success.**

Identify the Purpose of the Meeting

Meetings may be grouped into three general categories:

1. Meetings for exchanging information
2. Meetings for making decisions
3. Meetings for solving problems

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Examples for each are: (1) A project status meeting with a goal of exchanging information; (2) A change control meeting with a goal of making decisions; and (3) A design meeting with a goal of defining a design solution for a technical problem.

An **information exchange meeting** achieves its purpose if all team members get the information they need to proceed with their work. Information exchange meetings involve disseminating product requirement changes, raising technical issues, announcing changes in the lives of project team members, and reporting on risks that have either increased or decreased. Information exchange meetings are also great forums for team members to use each other as sounding boards for their upcoming decisions.

An important part of a **decision-making meeting** is to provide participants with the facts they need to make decisions. The purpose is to arrive at decisions that all participants agree to and can support.

The purpose of a **problem-solving meeting** is not only to develop a solution, but also to jointly formulate a common problem definition. It is important that all meeting participants have a chance to make a contribution.

Once you have defined the purpose in general, the next step is to prepare a specific agenda. An agenda defines an outline for the content for the meeting. What needs to be on the agenda depends on the task at hand.

When preparing a meeting agenda, ask yourself questions that will help you identify the topics to be addressed.

For example, when preparing an agenda for a status meeting, ask yourself the following questions:

What information is needed to begin work on upcoming tasks and who needs it?

Which external information and decisions have an impact on the project?

Which deliverables require coordination between several team members?

Have any concerns been brought to my attention?

What activities and tasks have been worked on?

Define the Deliverables or Work Products of Meetings

No matter what kind of meeting you are going to have, you should record the information shared and the outcome of the meeting in meeting minutes. Without meeting minutes, work accomplished in the meeting could be lost. Having someone record the information shared, the decisions made and the problems solved relieves other participants from keeping records themselves and allows them to participate more fully in the meeting.

Using a template for the meeting minutes allows them to be prepared faster, makes them easier to read and assures that nothing is forgotten.

For problem-solving meetings, it is important to assign ownership to a participant who is responsible for recording the work product and for distributing it to all participants. For example, the purpose of a meeting may be to define a documentation plan consisting of templates for all internal documentation. The recorder/owner is responsible for creating the final electronic form of the templates and for sharing them with all interested parties.

Create an Atmosphere for Success

The atmosphere or context of a meeting is an important factor in allowing people to share information, make decisions and solve problems jointly. People need to feel comfortable so they can focus on the task at hand. Participants need to feel and know that they can communicate openly, that their perspectives are respected, and that they can express their creativity.

Meeting participants will feel more comfortable if:

- A meeting adheres to a common format,
- The facilitator provides guidance, and
- The facilitator uses context-free questions to solicit needs and feelings.

People feel comfortable if they know what they can expect. A common format for meetings lets participants know that they can participate. This is the secret formula of toastmasters' meetings. Every meeting has the same format—an invocation, a joke, two speeches and table topics, followed by evaluations. The content is what changes. You can think of the familiar format as a ritual that makes participants feel at ease.

The following formats may serve as suggestions for your particular meetings:

Information Exchange Meeting

- Share general information.
- Follow-up on decisions and action items from previous status meetings.
- Summarize accomplishments.
- Outline upcoming work and decisions in the different functional areas.
- Summarize action items.

Decision Making Meeting

- Present facts.
- Obtain input and comments from stakeholders.
- Discuss and evaluate.
- Make decisions.
- Summarize decisions made and postponed.

Problem Solving Meeting

- Share problem perceptions.
- Jointly define problems.
- Jointly analyze problems.
- Jointly develop alternative solutions.
- Evaluate solutions.
- Make decisions.
- Summarize solutions.

Even if meeting participants are familiar with the format of the meeting, they still appreciate some guidance through the meeting. Just as we include written overviews, summaries and transitions to help a reader understand the written word better, spoken transitions, summaries and overviews help meeting participants to follow along.

By suggesting an agenda, the facilitator can provide an overview of the meeting. Articulating a transition will remind participants to move on to the next topic. The facilitator can bring closure to a discussion by summarizing the items of agreement.

The facilitator can also use context-free questions to solicit and comment on the perceived mood, to verify a common understanding and to inquire whether the needs of individual participants are met. Example questions are:

- Did you get all the information you needed?
- Are we moving too slowly?
- Does this summary express it clearly?

Context-free questions help to clarify and define the process. Example questions are:

- How long should we spend discussing item x?
- How should we document the decisions made in the meeting?
- How should we go about making decisions?

Making participants feel comfortable is the first step to open communication. Open communication is based on trust, and trust can be earned by maintaining neutrality in all work products that result from meetings, especially the meeting minutes. For meeting minutes, this means no editing, no omissions and no additions to what was said and decided in the meeting. Open communication means not holding back information, not judging information or opinions, and includes respectful listening. Open communication is absolutely essential in status meetings, because without quality data, the wrong picture is painted.

Using Project Meetings as Successful Coordination Tools

For project meetings to serve as communication and coordination tools, they have to achieve the following goals:

- Inform project members
- Provide opportunities to contribute expertise and knowledge
- Achieve agreement and support for the outcome

To attain these goals we have focused on three aspects of meetings:

1. A well defined purpose
2. A tangible outcome
3. A comfortable and supportive atmosphere

All three are important for successful and effective communication. Defining the purpose of a meeting and the work products that result from it will sharpen the content. Creating the right atmosphere for the meeting helps participants to focus their attention. No matter whether the purpose of the meeting is to exchange information, make decisions or solve a problem, people need to feel comfortable in order to participate.

Reference: "How to Make Meetings Work," by Michael Doyle and David Straus, ISBN 0-515-09048-4

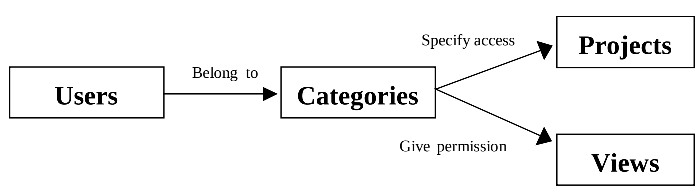
Administering Project Central

This is Part Two of the Microsoft Project Central series. Microsoft Project Central provides access for users to view project data through user and category administration. Categories specify the permission for viewing projects and which project data can be viewed.

Microsoft Project Central has four pre-defined user categories:

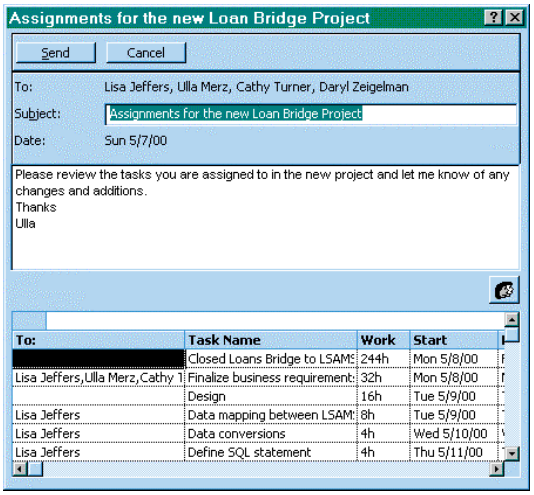
1. Executive Manager
2. Project Manager
3. Resource Manager
4. Team Member

Users belong to categories. Users with the resource role belong to the pre-defined Team Member category, and users with the manager role belong to the pre-defined category of Project Manager. Team members can view project data of projects they are assigned to. Members of the Executive Manager category can view all projects stored in Microsoft Project Central. Members of the Project Manager category can view projects after receiving permission from the Administrator.



Providing Users with Access to Project Data

To provide resources/team members with access to the projects and tasks they are assigned to, the project manager uses the TeamAssign function of the WorkGroup feature. Before using the TeamAssign function, review the user name specified under Tools, Options and the General Tab, and the settings for Identification for Project Central Server in the WorkGroup tab. As the project manager, select all tasks in the Gantt view and choose the TeamAssign function under Tools, WorkGroup.

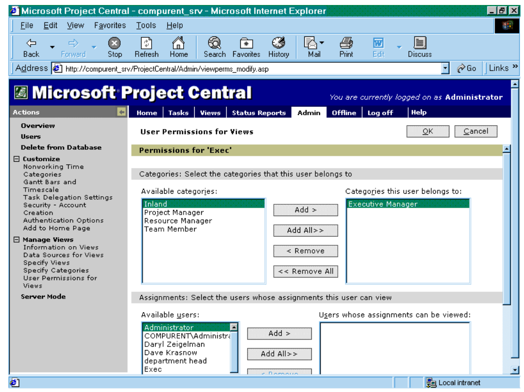


Following the execution of TeamAssign, team members and the project manager can login to Microsoft Project Central using their resource names as specified in the project file. Team members can retrieve the TeamAssign messages by selecting Messages on the Home tab of Project Central. A response to the message is not required. If there are changes and additions to the assignments, the project manager can send either TeamUpdate or TeamAssign messages for selected tasks, or select all tasks and use the Resend All Messages function.

Providing Access to Project Information for a Sponsor

Log into Project Central as an administrator. Select Admin, User and define a new user with the role of manager.

Select Admin and Manage Views, and then select User Permissions for Views. Select the user and then Modify User Permissions. Add the user to the Executive Manager Category.



P2E Calendar of Activities

- **Tues., Oct. 10, 3:30 – 9 p.m.**—SQUAD Conference 2000, Keynote Speaker Watts Humphrey. Contact sprenkle@lycos.com or 303-723-6817.
- **Wed., Oct. 11, 5:45 – 8 p.m.**—Channel Strategy and Development, Speaker: Liz Coker, Sr. Director of Marketing, Tactical Marketing Ventures, Boulder Software Club. www.dimensional.com/~sms/bsc/
- **Sat., Nov. 4**—"A Practical Look at Enterprise Applications and Middleware," Ron Schweickert, Professional Development Seminar, Boulder Chapter of the ACM. Cost: $95. www.acm-boulder.org

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ADDRESS CORRECTION REQUESTED

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