

Executive Summary

Final Question

What constitutes an effective meeting vs email, including planning, information, participants, and the impact they have on driving outcomes? Essentially what is the lifecycle of a meeting.

Introduction

Meetings drive a company and its outcomes. Some signs of poor meeting culture are endless meetings, without results, there are too many people at every meeting, and not everyone participates, just a few speak up.^[3] What a company wants is to make things as easy and smooth as possible with the least amount of people necessary to push outcomes and improve the ROI of people's time. A good meeting culture can be summed up through 5 key characteristics: Accountable, Objective-Driven, Efficient, Honest, and Actionable.^[3] The essential conditions to make the lifecycle of the efficient meetings involve three distinct stages.

Stage 1. Whether the meeting should be an email or other?

The first stage to enhancing meeting culture is to set boundaries. In this case, what should be a meeting and what should be an email. In many organizations too many employees feel their time is wasted and the information could have been transferred through email^[4]. Some common recommendations can be broken down into 2 main ideas:

- 1. Give power to employees:** Employees should feel empowered to cancel meetings that have a standing date but no reason to meet or any updates^[11]. Additionally, meetings should set a clear agenda, limiting tangential discussions and being thoughtful in creating the attendee list^[6]. All of this is to push employees to make decisions around their own time and whether they need to be at the meeting. Instances with multiple people from an individual team attending a meeting likely doesn't need all of them there to hear the same information.
- 2. Train and audit:** Training employees on what meetings should include and setting guidelines can prove beneficial in determining which meetings are necessary^[6]. Additionally, regularly auditing how many meetings occur and questioning if a meeting is truly needed^[6] can help cut back on unnecessary meetings and transfer it to other forms of communication. One method that can be implemented without communication is a tracking system that allows team members to bring up challenges they're dealing with and provide status updates on their work^[6].

Stage 2: Who should be there?

The next step is determining who should be there. The general rule is the sweet spot is five to seven. More than seven attendees in any meeting can result in an unwieldy discussion^[12]. When considering scheduling a

meeting and who should be there, considering the *OVIS framework*: Owner, Veto holder, Influencer, and Supporter^[1].

- **Owners** have the final authority and are accountable for the impact and efficacy of their decisions. In addition, they are responsible of managing an inclusive decision process that involves all other relevant stakeholders.
- **Veto holders** can block owners' decisions but are advised to exercise that power sparingly. Veto holders should work to resolve their concerns with the owners during the decision process.
- **Influencers** are responsible for implementing the decisions that owners make, or they have unique expertise that owners need to make good decisions.
- **Supporters** provide required information to make decisions but are not necessarily included in the decision process.

This framework can facilitate clear and sustainable improvements for organizational performance which in turn helps any organization capitalize on the ROI of employees' time^[1].

Stage 3: How to drive results?

In the last step of the life cycle of a meeting, the key is to drive results. Meetings can be split into 3 stages:

1. **Before-meeting** the best practices is to assign each meeting to one of the following three categories: Decision-making meetings, creative solutions and coordination meetings, and information-sharing meetings^[13]. Doing this can prompt everyone with what type of discussion this will be and what they should prepare for. Additionally, share notes, materials, links, and other information in advance, so participants can prepare beforehand to prevent wasting time discussing details during the meeting^[8].
2. **During-meeting** assign a facilitator to balance participation and follow up after meetings^[7]. After deciding what type of decision is being made, the facilitators set a deadline, gather options, and determine the worst-case scenario^[9].
3. **After-meeting** procedures are not to be forgotten, as it serves as reminder to all who attended on what the goals are and tasks that have been delegated. Ideally the facilitator can follow up after the meeting with a summary of the meeting^[7]. Following through on action plans and consistently getting constructive feedback from all attendees are also important^[4].

Conclusion

Meetings can drive outcomes and create massive returns when done right. The life cycle of a meeting starts from determining what the goal of the meeting is and if a meeting is necessary. The 3 main stages described above are key factors to make meetings efficient and meaningful.

1. Deciding whether the meeting should be an email or other.
2. Determining who should be included in the meeting.
3. Ensuring the meeting drives results.

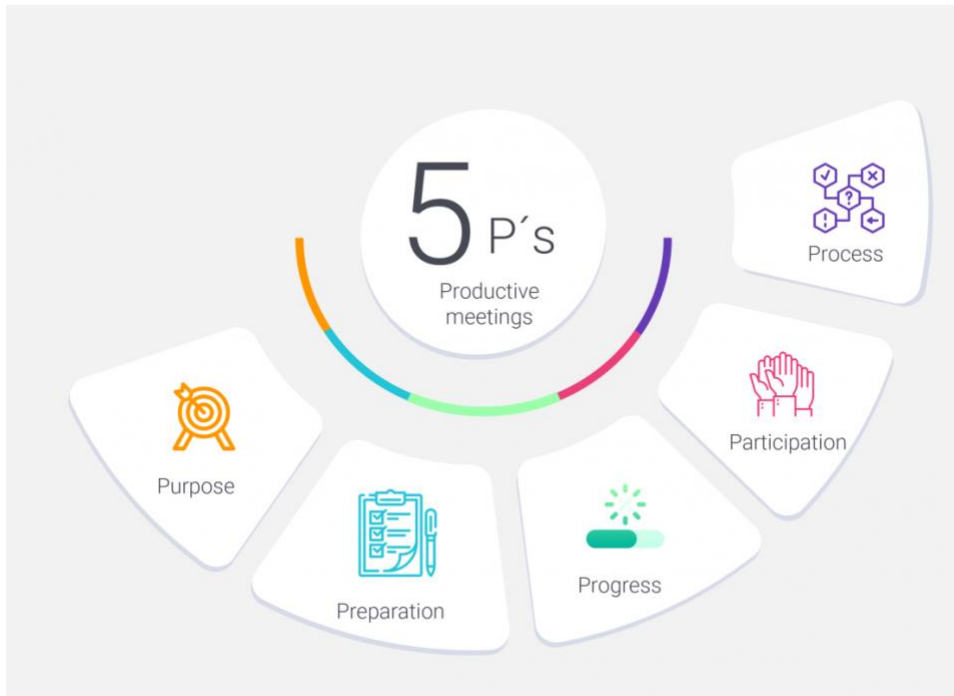
By adhering to this meeting lifecycle, organizations can cultivate an effective meeting culture.

References

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Appendix

The 5 P's^[2]



1. Purpose:

The purpose is the starting point for any efficient meeting. Before scheduling the meeting, clearly define what it intends to achieve. Ask yourself about the meeting's specific objectives and what you expect to be discussed or decided. Make sure that the proposal is relevant and that the meeting is the best way to deal with the topic at hand. With a clear purpose, participants will be more aligned and focused, increasing the chances of success.

2. Preparation:

Preparation is one of the secrets to an efficient meeting. Communicate the purpose and the meeting agenda to all the participants in advance. This will allow them to adequately prepare, gathering relevant information and arriving at the meeting ready to contribute. In addition, assign specific tasks if necessary, so that everyone's responsibilities are defined prior to the meeting. Appropriate preparation also involves reserving the right location, providing audiovisual resources, and guaranteeing that any necessary documents or presentations are available.

3. Progress:

It is important that meetings be conducted in a way that ensures progress toward the objectives established. Stay focused on the agenda and avoid unnecessary detours. Set a timeline for each topic and make sure that

all important issues are covered within the time allotted. If tangential issues or matters that require more time arise, write them down to discuss at another time, if needed. Monitor the meeting's progress and ensure that everyone is aware of the next steps to take.

4. Participation:

An efficient meeting depends on active engagement and participation from everyone involved. Encourage participants to share their opinions, ideas, and concerns. Create a safe environment for everyone to feel comfortable contributing. As a leader or facilitator, be inclusive and guarantee an equal opportunity for everyone to express themselves. If necessary, encourage shier people to talk, while at the same time keeping one or a few participants from monopolizing the conversation. Having diverse perspectives is an excellent tool for finding better solutions.

5. Process:

Process refers to the meeting's structure and organization. Start and end the meeting at the times set to show respect for everyone's time. Follow the agenda with discipline and control the time spent on each topic. Note decisions and the main points discussed during the meeting and share this information later with all the participants. Check that actions and responsibilities are clearly attributed and documented to avoid misunderstandings.