

HOW TO HAVE

MEANINGFUL MEETINGS

Using CONNECT SCAN FOCUS ACT to ensure productive and impactful meetings

Meetings are expensive.

They take everyone's time and attention - so why would you have one without being really clear on why you are bringing these valuable resources together?

Your first step in having good meetings is to ask yourself if you can eliminate the meeting altogether.

Checking in on status, e.g. can be done via a shared Kanban board or project management system. Simply updating people can be done via your communication tool.

Only if you really need to get together to plan, coordinate, collaborate, or learn together does it make sense to take time away from getting things done.

So, when you decide to call a meeting, be clear on the purpose and who *really* needs to participate.

Make meetings as effective as possible with CSFA.

WHY MEET?

Strategy

Scenario Visioning, Pipeline Check, Decisions, Planning, Ordering of Work

Coordination

Updates, Prioritization and Alignment, Resource Management, Scheduling

Collaboration

Co-sprinting, Co-Creation, Research Spike, Prototyping, Ideation

Retrospectives

Feedback, Clearing, Feedforward, Acknowledgements, Celebrations

Meta or Social

Meet just to connect as humans or to talk about how you are connecting

MEETING PURPOSES

CSFA

Is a simple multi-purpose tool that provides a clear structure to meetings

CONNECT

Creating connection and safety in the room



ACT

Review what are we committing to and where we are storing information.



SCAN

What do we want to cover in this meeting?



FOCUS

Work through one item at a time until the next action is determined

1 CONNECT

Get everyone “in the room”

In an increasingly uncertain and stressful world, it is vital that leaders establish Purpose and **Psychological Safety** (the number one indicator of high-performing teams).

By starting a meeting with connecting to each other as humans, we subtly begin to shift from hiding and deflecting to sharing and vulnerability - both keys to creating together.

The difference between people who work together and a team, is that in a team people care about each other.

WHY?

- Welcoming atmosphere and setting the tone
- Get everyone “in the room” – establish presence and participation
- Set up psychological safety

HOW?

- Start on time - reliability creates comfort
- Intention – Focus on who you want to be before you even enter the room
- Modeling – Be the example of tone
- Use agreements to establish a clear container
- Synchronization, e.g. through breath

WHAT?

- From conscious breathing to deep sharing as appropriate to depth of relationship

PSYCHOLOGICAL SAFETY

When we have it

I am ok

Challenger Safety

Safe to speak up and challenge the status quo

Contributor Safety

Safe to use your skills and abilities to add value

Learner Safety

Safe to ask questions, experiment, and even to make mistakes or try something new

Inclusion Safety

Safe to be yourself and are accepted for who you are



Shutting out/ down

How we deal with people who challenge us



Devaluing Contribution

Reducing self-reliance and killing self-esteem



Punishing Mistakes

How we handle it when people screw up - why good feedback is key



Exclusion

Leaving people hanging when they long for belonging

Based on: Dr. Timothy Clark, *The 4 Stages of Psychological Safety: Defining the Path to Inclusion and Innovation*

I'm not ok

When we don't

FREEZE
Procrastinate

FLIGHT
Deflect

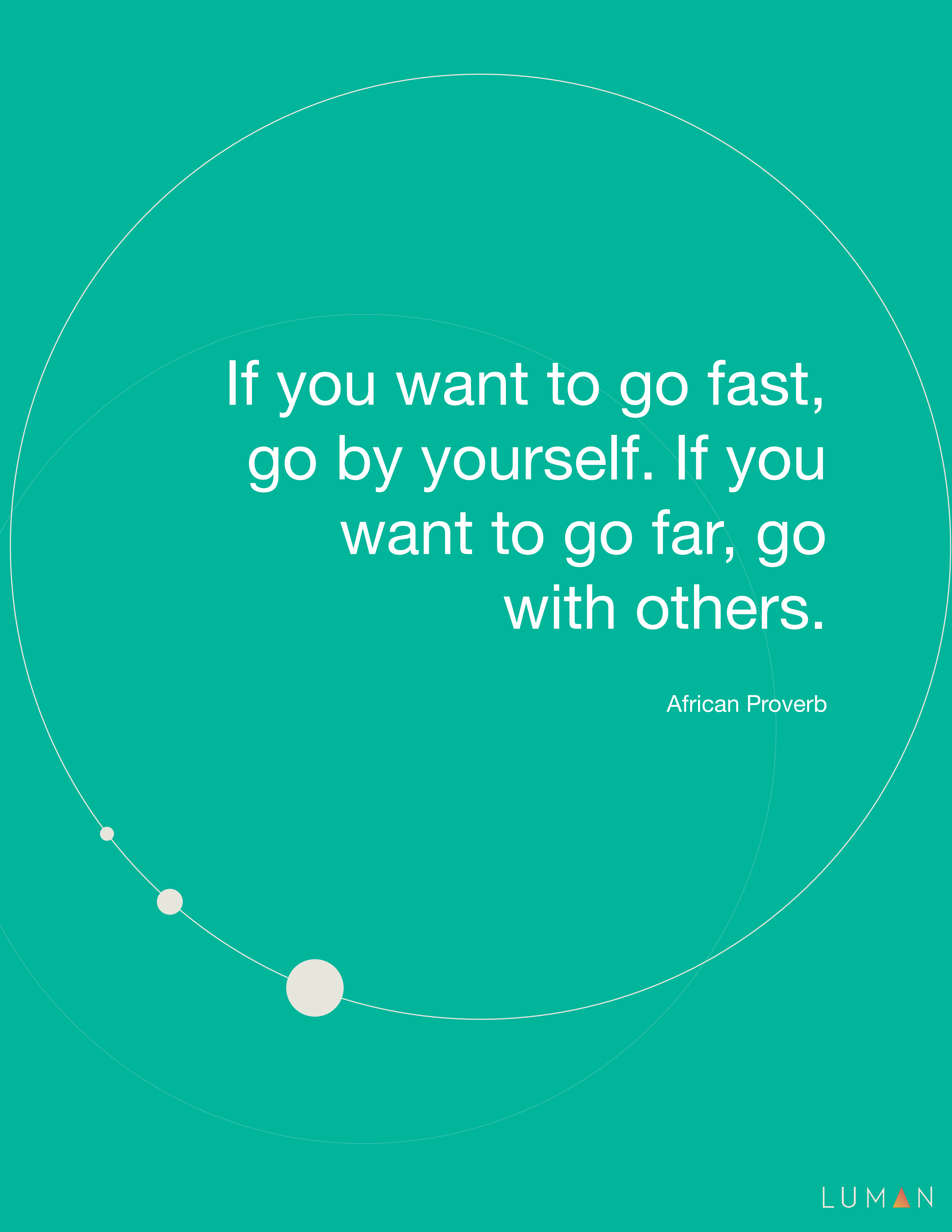
FIGHT
Blame

FAWN
Compromise

A lack of **Psychological Safety** results in an Amygdala response that triggers one or multiple of our stress responses. None of them are particularly helpful for collaboration.

The number one indicator for high-performing teams is Psychological Safety - as everyone feels included, safe to explore, feels honored around their contribution, and everyone takes ownership of how the team performs.

WHY?

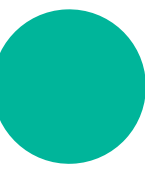


If you want to go fast,
go by yourself. If you
want to go far, go
with others.

African Proverb



Get everyone's agenda on the table



Everyone has an Agenda. Get it out. Key is that every item that is important to someone at least gets mentioned. You can then decide whether you want to focus on the item in the next step or find another way of making sure it gets addressed. This way, everyone can focus on the items at hand instead of holding on to their priorities.

Determine type for each agenda item and assign an estimated duration. Make sure to not get into any details, but stay focused on listing (can also start before meeting, but make sure to at least review together).

WHY?

- Clarify the purpose, agenda and anticipated outcomes
- Get everyone's voice "in the room"
- Make people feel seen and heard

HOW?

- Broad framing – corners of the container
- Active Listening – Restating for the room

WHAT?

- List items to cover
- Create a clear time box around each item
- Clarify anticipated outcome for each item

SCAN for what matters

Information

No discussion required

Decision

Permission, Completion, Stage gate

Coordination

Scheduling, Resource Allocation

Ideation

Information gathering, Solving

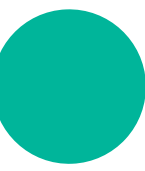
TYPES OF AGENDA ITEMS

*All wisdom is
rooted in
learning to call
things by their
right names.*

Confucius

3 FOCUS

GET TO WORK! Everyone's time is valuable



Once you determined priority and timing for each item, it's time to work through them.

Make sure people stay on topic, and have a timekeeper ensure that you stay on track (expand or postpone as necessary).

Remember that everyone is responsible for the outcome of the meeting - withholding and gossiping after are not acceptable.

If new items come up, add them to the scan list to be addressed later or scheduled for another time at the end of the meeting.

Keep track of who is doing what to be ready for review in the final step.

WHY?

- Bias for outcome and creation
- Decisions enable autonomy and action
- Keeps the conversation clear

HOW?

- Gently bring the conversation back
- Be rigorous about time and bias toward forward momentum
- Redirection - remember the Aikido of tangents

WHAT?

- Discuss items until a clear next action is clarified - this could be setting up a next meeting

*Nobody cares
how much you
know until they
know how
much you
care.*

Theodore Roosevelt

4 ACT

BE KIND. EVERYONE (INCLUDING YOU) IS DOING THEIR BEST.

Without making sure you capture what everyone is committed to creating by the end of the meeting, things can easily get lost - especially when moving from one meeting to the next in virtual spaces.

Make sure to transfer action items into your task management system before adjourning to capture your Agreements.

WHY?

- Transference
- Commitment
- Accountability

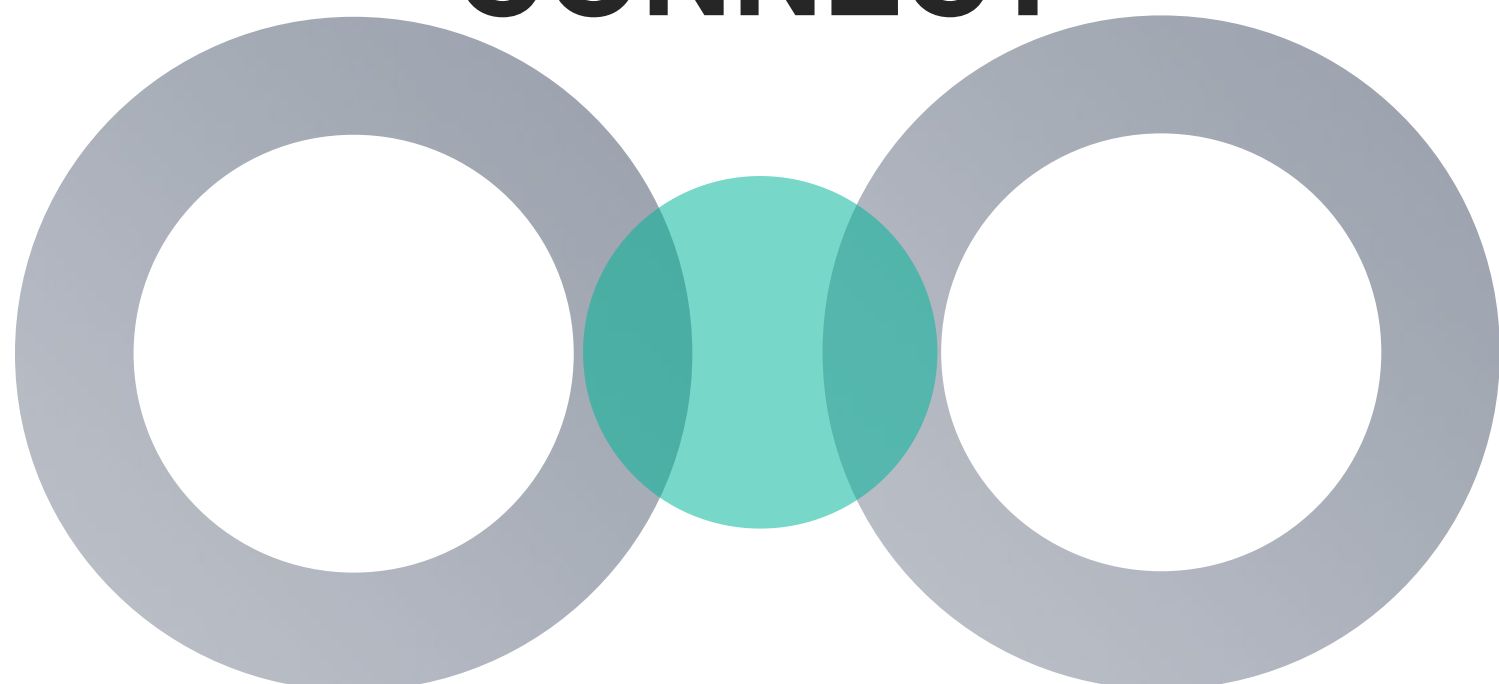
HOW?

- Write things down in systems: project management systems, task systems, notepads, kanban boards, calendars, intranets
- Write things down!
- No, seriously, write things down!

WHAT?

- Clear actionable items: Who, for What purpose, by When

Agreements CONNECT



→ Click to learn how to make good agreements ←



Individual
commitment to a
group effort - that is
what makes a team
work, a company
work, a society work,
a civilization work.

Vince Lombardi

**Want to learn how to
collaborate and
create together -
especially amidst
uncertain times?**



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