

An End to Meeting Madness



*How to lead focused, energized,
interactive meetings that build teamwork,
reduce stress, and deliver breakthrough results*

by Maria C. Birkhead
with John W. Myrna

Published by *QuickStudy* Press
PO Box 16234 ● Alexandria, VA 22302
20 19 18 17 16 15 14 13 12 11 10 9 8 7 6 5 4 3 2 1

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interactive meetings that build teamwork,
reduce stress, and deliver breakthrough results

By Maria C. Birkhead with John W. Myrna

With illustrations by Sir John Tenniel
and quotes from *Alice's Adventures in Wonderland*
and *Through the Looking Glass* by Lewis Carroll

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Printed in the United States of America
ISBN 1-891660-03-9

Proofreading by Nowick Gray
Hyperlife Editing Services, www.hyperlife.net/editing.htm

Index prepared by Sandi Schroeder
Schroeder Indexing, www.schroederindexing.com

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Forward

In 1991 we founded Myrna Associates to fill a void. The organizations with the passion and competence to truly assist businesses seemed focused on serving a small number of very large firms. The businesses that created the majority of new jobs, who represented the very bedrock of America, seemed to be left on their own.

Some businesses stretched their budgets and signed up Fortune 500 consultants, attempting to adapt techniques oversized for them. Others reached into the local community for help from colleagues, college professors, and independent consultants that traditionally provided a little bit of everything.

Myrna Associates took a different path, the road less traveled. We focused on businesses on the path between \$2,000,000 and \$100,000,000. Most importantly, we decided to focus exclusively on strategic planning. The core of our strategic planning process is a disciplined two-day meeting of senior executives followed by quarterly one-day reviews. Rather than taking an academic approach, we committed ourselves to building a process based on continuous feedback from those planning meetings. After eighteen years and hundreds of meetings, we have developed an all-but-foolproof process for developing a strategic plan that actually changes an organization's status quo. We also gained a deep understanding of how to make meetings successful.

At the end of every meeting we facilitate, we ask the broad question "How did we do?" One of the most common comments is "These Myrna meetings are so effective, how can we make our normal meetings work as well?"

Maria Birkhead, one of our senior facilitators, took up the challenge to document the best of the meeting techniques she and our facilitators have developed from the crucible of actual meetings.

This book was written for anyone who has to facilitate a meeting. Facilitating meetings is one of the key skills exceptionally successful people have. Meetings can be a powerful tool for problem-solving, setting direction, establishing commitment, and producing results. A well-facilitated meeting will enhance teamwork, improve results, and reduce everyone's stress. Poorly facilitated meetings not only waste everyone's time, they often damage teamwork and breed cynicism.

Whether you facilitate often, occasionally, or just want to see your meetings become more successful, this is the book for you.

January 2009 – John and Mary Myrna, Co-founders of Myrna Associates Inc.

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Introduction



Alice sighed wearily. "I think you might do something better with the time," she said, "than waste it in asking riddles that have no answers."

"If you knew Time as well as I do," said the Hatter, "you wouldn't talk about wasting it. It's him."

"I don't know what you mean," said Alice.

"Of course you don't!" the Hatter said, tossing his head contemptuously. "I dare say you never even spoke to Time!"

Alice's Adventures in Wonderland
by Lewis Carroll

Do your meetings make you mad?

In Lewis Carroll's *Alice's Adventures in Wonderland*, Alice falls down a rabbit hole and lands in one adventure after another. She finds herself in a number of meetings along the way. For Alice, these encounters are exasperating. Nothing quite makes sense. Conversations go in circles, and she leaves each meeting befuddled and without direction.

Do you ever feel like Alice at the mad tea party? Have you been in meetings where people, like the Mad Hatter, are downright rude? Is the talk a lot of nonsense with no connection to reality? Did you ever feel like you couldn't wait to get out there? If your meetings are less than perfect, you're not alone. There are 11 million meetings attended by professionals in the U.S. every day, and research indicates that at least 50% of the time in those meetings is wasted.¹

Interactive meetings don't have to be dismal. A room full of people fully engaged and actively learning from each other is a beautiful sight. Picture instead a focused, energized team putting heads together to make a positive difference in their work. Envision a session where people open up and talk about the things that really matter and then work together to figure out how to accomplish great things. Consider a gathering that is a splendid adventure rather than "just another meeting."

I've worked as a professional meeting facilitator since the early 80s when much of the world didn't know what a facilitator was. After about 20 years of this, I knew I was a good facilitator. I had collected some helpful tools for running productive meetings, and groups were thanking me and asking me back for more.

Then, around the turn of the century, it got better. I met John and Mary Myrna and found a treasure trove of facilitation methods that I knew were like nothing anywhere else in the world. John and Mary had conducted

¹ *Meetings in America: A Study of Trends, Costs and Attitudes Toward Business Travel, Teleconferencing, and Their Impact on Productivity*, Network MCI Conferencing White Paper (Greenwich, CT: INFOCOMM, 1998); and Robert B. Nelson and Peter Economy, *Better Business Meetings* (Burr Ridge, IL: Irwin Inc., 1995).

hundreds of planning meetings all through the 90s, and they did something that few facilitators take the time to do. When they happened on something that worked well in a meeting – something that struck a chord with people and resonated with groups, something that made a profound difference in a meeting – they documented it and then applied it repeatedly until perfected. By the time I came along in 2001 to sign on as a Myrna Facilitator, these gems of facilitation were achieving breakthrough results. When I added them to my professional facilitation toolbox, it was an instant WOW! People didn't just thank me and ask me back. There were rave reviews and standing ovations. The "Myrna Magic" is sprinkled throughout this book. You'll know when you come across it because it's unlike anything you've ever seen. These are gifts from John and Mary – like the penguin story in Chapter III – a tool that all by itself can turn a meeting around and take it from mediocre to memorable.

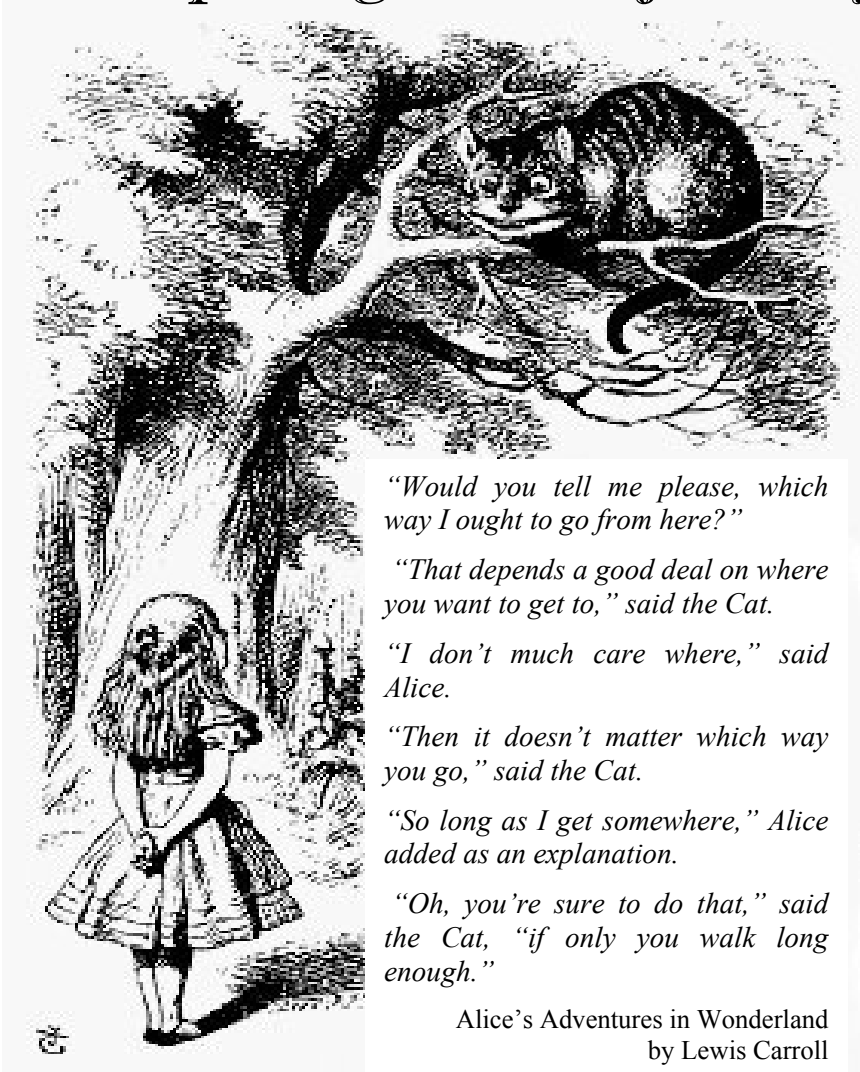
Professional meeting facilitators spend years learning how to make meetings go well, and we know that it's not as easy as we make it look. We have trolley bags full of tools to foster productive dialogue. Some of our facilitation techniques are sophisticated and take years of study and practice. That's why we recommend you use a professional facilitator for all-day off-sites and for meetings with high stakes.² We also understand that it's not practical to hire an outside professional for every meeting. Luckily, many of the tools we use are straightforward and relatively easy to learn. This book is full of simple tools that can dramatically improve your meetings.

If you lead or participate in interactive problem-solving, decision-making or action-planning meetings, you need the tools in this book. It's miserable to sit through (and even more miserable to lead) meetings that wander around like Alice, stumbling through a lot of nonsense and winding up nowhere. Read this book and end the madness. I know you're busy, so I'll get right to the point. Here are the easiest and best tools for leading collaborative get-togethers. Take them and run.

² Special thanks to fellow Myrna Facilitators George Fowler and Jim Kabanni for contributing experience and wisdom to these pages. To facilitator and author extraordinaire Suzanne Giesemann, thank you for encouraging the writing of this book in the first place. All along the way, Suzanne supported the belief that we have a wonderful story to tell and gave me the confidence to keep after it. It's true. People can accomplish far more through the sustained efforts of a team.

I

Preparing for the Journey



“Would you tell me please, which way I ought to go from here?”

“That depends a good deal on where you want to get to,” said the Cat.

“I don’t much care where,” said Alice.

“Then it doesn’t matter which way you go,” said the Cat.

“So long as I get somewhere,” Alice added as an explanation.

“Oh, you’re sure to do that,” said the Cat, “if only you walk long enough.”

Alice’s Adventures in Wonderland
by Lewis Carroll

Know where you're going

Team meetings can feel like falling down a rabbit hole. There are



tumbles, surprises, wrong turns, and mishaps. The more preparation the better. The first tip for leading better meetings is to figure out why you're meeting. When you take the time to do this, much of the meeting will run itself. If you don't, everyone has a slightly different idea of what is to be accomplished. They all pull in different directions, and the meeting stalls out. So do your homework. Ask around and settle on a purpose.

Decide on the meeting's purpose.

Put your purpose statement in writing. Ask the folks who will be coming to the meeting if your statement of purpose makes sense to them, and plan to post it for everyone to see. Nothing fancy – just make sure there is a general understanding of why the meeting has been called and what results are expected. Refer to this statement as you progress through the meeting, and make sure that everything you talk about relates to the purpose at hand.

Here are three examples of meeting purpose statements:

1. For a work team meeting:

Agree on a prioritized list of features
to recommend for our new copying machine.

2. For a nonprofit board committee meeting:

Compare candidate qualifications with our hiring
criteria and select three candidates to interview.

3. For a management team:

Identify and understand the problems associated
with the acquisition and develop a plan to get
the integration effort back on track.

A good purpose statement focuses everyone on understanding an issue, tackling a problem, or making a decision. It should lead to action and real results. People need to know they are contributing to positive outcomes.

*Be very careful.
If you don't know where you're going,
you might not get there.*

– Yogi Berra

Write a commercial for your meeting.

When you send out a meeting invitation, include your purpose statement and an advertisement. Think about how you will sell the meeting in your communications. If people understand up-front why the meeting is important and how they can add value with their contribution, you'll begin the meeting with an advantage.

- *Many of you have expressed frustrations with our current copying machine capabilities. Now's our chance to step up our department's productivity with new equipment of our own choosing.*
- *As you know, we are in a unique position to take our organization to a new level this year. Hiring the right Executive Director is a key factor in achieving that success.*
- *Let's take some time out and tackle these nagging acquisition integration problems. Together, we can come up with the right answers.*

Make sure you have a clear, focused purpose and a good reason for everyone to be there before you start your meeting. While you're at it, ask yourself if you really need to have a meeting in the first place. Will this meeting address a complex topic for which no one person has all the answers? Is group support necessary to implement a plan of action? If an email, a memo, or one-on-ones will accomplish the same or better results, by all means, don't call another meeting. That's silly.

Create an agenda

Your agenda is your GPS. Don't leave home without it, or you can get hopelessly lost. Ideally, agendas should be distributed in advance for a more focused, more productive meeting. In the real world, this often eludes us. The secret is to keep it simple. Strive for an agenda that fits on one page. Use bullets with big spaces in between. Put space at the bottom so that people can make notes. The example on the next page is based on one of the purpose statements I mentioned earlier. You can put something like this together in no time, and it will save you big time.

Consider the main questions.

When developing an agenda, first ask, "What are the main questions to be answered by the group in order to achieve our purpose?" It's a good idea to ask key stakeholders to help you develop these questions. Compose a list of background questions. Here are some examples of questions for a meeting to select features for a department copying machine:

1. *What copier features are available?*
2. *How might these features improve our productivity?*
3. *What are the budget considerations?*
4. *What are the essential features to recommend to Purchasing?*
5. *What additional features would be nice to have?*

Notice that these questions are broad. That's important. If the questions are "either/or" questions (such as whether to order the copier from one vendor or another), it will limit participation. If an answer to a question can only be "yes" or "no" (as with "Do we need a new copier?") people are likely to line up on two sides of the room for a tug of war. To foster robust dialogue, design questions that open the floor for a variety of ideas and opinions. Follow up with questions that encourage the group to analyze, prioritize, and decide. It takes some thought to come up with the right background questions, but once you know what they are, creating the agenda is easy.

Agenda

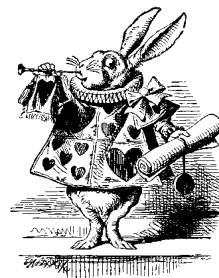
90-Minute Team Meeting

Meeting Purpose:

Select the features to recommend for our new copier

- Introductions/Purpose & deliverables (5 minutes)
- Meeting rules (5 minutes)
- Key background information (5 minutes)
- Generate a list of copier features (10-15 minutes)
- Understand uses and benefits of each feature (15-20 minutes)
- Analyze features in relation to costs (10-15 minutes)
- Agree on “Must Haves” and “Nice to Haves” (5-10 minutes)
- Agree on a list of prioritized features to recommend (5minutes)
- Next Steps / Summary / Close (5-10 minutes)

Action items:



Keep the big picture in mind.

Your topic may link to other meetings. When a meeting is one of a series of meetings, prepare a rough draft of all the agendas in advance to keep everything in its place. Ask, “How does this meeting tie in with previous and subsequent meetings?” Forgetting this step is one reason meetings get such a bad rap. People feel like nothing gets accomplished in meetings when the next meeting rehashes the last one and ends right where the first one started. It brings to mind the Red Queen’s remark,

“It takes all the running you can do, to keep in the same place.”

Establish discussion timeframes.

In deciding how long your meeting should be, consider the cost of meeting time. Perform a quick cost-benefit analysis. If the average hourly wage for group members is \$50 per hour, a 2-hour meeting with 7 people attending will cost at least \$700. Ask the question, “Will something worth \$700 be accomplished in this meeting?” “What aspects of the meeting will deliver the most value?” Now choose your topics and their timelines carefully. Remember, meetings are generally longer than they need to be. Many of the items that wind up on agendas shouldn’t be there. They can be handled outside the meeting. Problems arise when you overload the agenda. Keep it simple.

I know that figuring out how long discussions will take can be puzzling if you’re new at designing collaborative meetings. Here’s some help. Keep introductions, lead-ins and wrap-ups short – no more than 5 to 10 minutes. Save the majority of your time for drawing out and prioritizing critical issues, solving problems, engaging in open dialogue, building consensus, making decisions, and planning action. Work in small manageable chunks of time. The most effective activities and processes are generally 30 minutes in length or less.

Gather participant input in advance

Meeting leaders often set up interviews prior to the meeting to find out what's on everybody's minds. This helps with agenda development. It can also be dangerous. As the meeting facilitator, you are to remain neutral, and it's easy to get embroiled in "palace intrigue" with one-on-ones. You might appear to be in collusion with someone or, worse yet, unwittingly play into the hands of a conspirator.



Send out a simple questionnaire.

It's your call of course, but if you are an internal facilitator and hope to get everyone to participate equally, here's a technique that's almost foolproof. Circulate an input form along with the agenda in advance of the meeting.

Ask a handful of questions based on the agenda topics. Invite people to take the time to think about and answer the questions and to return their responses in advance of the meeting. Use email or a fax machine or one of those nifty survey services on the Internet. Limit answers to three to five bullets per question and request brevity. Honor confidentiality. If people are uneasy about sensitive issues, have the input sent through the most neutral party you can think of to provide some anonymity. I ask a colleague to key in the responses for me so that by the time I receive them, I can't see the source. It keeps me from forming opinions and making assumptions about people and content while I'm facilitating.

Now, capture all of this valuable input in one place. Cluster similar topics and put everything in alphabetical order to obscure the author and eliminate any assumptions about the relative importance of the items. Number the grouped ideas for easy reference. Hand out the compiled results in your meeting one page at a time and watch the magic.

Using input forms saves time. First, everyone has already begun to think about the agenda questions. That's huge. It also eliminates a lot of

Preparing for the Journey

nonsense. You'll see less relevant comments on the handouts, but people look right past those and go to the heart of the issues. They'll also focus on what's been said, not who said it.

A second benefit to using forms is that a diverse, independent group of people will derive a better solution than any one expert. By way of explanation, consider the following story.

In 1968, the US submarine *Scorpion* disappeared in the North Atlantic. The Navy knew the sub's last reported location, but had no idea what happened and only a vague sense of how far it traveled. John Craven assembled a team of submarine specialists, mathematicians, and salvage men. He asked each to provide their best guess about why the sub had a problem, its speed and direction, steepness of descent, and so forth. The average of all their guesses placed the sub within 220 yards of where it was ultimately found.³

Preliminary input is a powerful tool. When people see one another's best thinking assembled on a page, they can mix, match, and blend thoughts. They can see the interconnectedness of all their ideas. They can grasp issues in the whole to make sophisticated tradeoffs. The result is deeper insight, better decisions, and sometimes – pure brilliance.

³ The book *The Wisdom of Crowds*, by James Surowiecki (Doubleday, 2004) relates this story from the book *Blind man's Bluff* by Sherry Sontag and Christopher Drew (New York: Harper Collins, 1998).

Appendix



Who is Maria Birkhead?

Perhaps you recognize Maria. She was an original Kuner Tomato – but that's another story.



Confucius says, “Find something you love to do, and you’ll never work another day in your life.” Maria discovered her love at a family reunion, around a campfire late one night, when she found herself encouraging robust conversations about happy and not-so-happy family memories. That was the first time she realized she wanted to be a facilitator –

she didn’t know there was such a thing, but knew she could be great at it. With this newfound goal and the encouragement of the other love of her life, husband Charlie, she set out to be among the best in the world.

She joined the International Association of Facilitators and studied the relatively new art of facilitation extensively. She is a Certified Professional Facilitator and one of only 44 Certified CPF Assessors in the world. She was certified as a trainer for AchieveGlobal and Development Dimensions International and is a qualified trainer for Ken Blanchard Companies’ *Situational Leadership II*.[®] Over the years, she has facilitated countless interactive sessions to strengthen organizational leadership and engage workforces.

Today, as a Senior Facilitator with Myrna Associates, Maria facilitates strategic planning retreats and ongoing strategic renewal sessions that build teamwork, reduce stress, and deliver breakthrough results. In addition, she designs and delivers customized, facilitated sessions for the public, private, and nonprofit sectors that enable teams to tackle a wide range of organizational issues. Maria won’t show up in a tomato suit, but you can count on a relaxed, light-hearted atmosphere where people open up, laugh a little, and work together to get important things done.

Maria and Charles raised five beautiful daughters, have one perfectly delightful granddaughter and another on the way. They live in Oklahoma for the time being and have a dream awaiting on 40 acres in Colorado.

Who is John Myrna?

John has the gift for bringing out the best in companies and their management teams. His broad business experience and knowledge, quick



intellect, and native ability and passion for teaching have combined to produce one of the truly great strategic planning facilitators – or so his myriad of satisfied clients have reiterated time after time. From John’s first magical experience in 1976 he’s marveled at the power of a well-facilitated strategic planning meeting

to affect change, generate immediate results, and kick start growth.

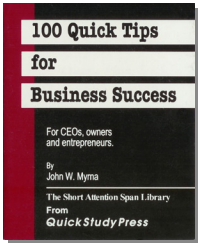
What started as marvel evolved into all-consuming passion. Applying his Electrical Engineer’s discipline, he studied and analyzed the planning process to learn its secrets and pitfalls. How did some meetings work better than others? Why did one year’s plan set the place on fire while another disappeared into the file cabinet? And, why did it take two weeks?! Who can afford two weeks? Soon he was applying his insights at his and colleagues’ companies. He fashioned a two-day planning process that became the cornerstone of a successful turn-around practice.

In 1991, after telling his wife Mary for the thousandth time how he was going to facilitate strategic planning once he retired, she laid down an ultimatum. “Start the business now or stop talking about facilitating planning – forever.” He countered – “I’ll do it, but only if you are my full partner.” “Great,” she said, “as long as I own half!” Since then they have been totally focused on strategic planning and only strategic planning. In many ways they were like Bill Murray in the movie *Groundhog Day*, reliving the same two days over and over again – until they got the process perfect.

John freely shares the secrets he’s uncovered. His website is a cornucopia of useful information on planning and management, as are his talks, articles, books, CDs, and special reports. He is a frequent speaker at CEO groups.

John and Mary’s son Adam is a Network Engineer with a major consulting company in Maryland. Daughter Kathern is a DVM with an ophthalmology specialty. Daughter-in-law Jennifer manages Myrna Associates’ back office and their two grandchildren.

Other Publications of the Authors



100 Quick Tips for Business Success

107 pages, one strategy per page

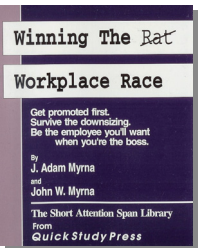
©1994 John W. Myrna, published by *QuickStudy Press*

Perhaps it is the engineer in John, but he has forever been asking himself how and why things work. Over the years he has built up an informal set of strategies – rules of thumb – general insights on why things work and how to be successful.

These pragmatic tips come from struggling with the day-to-day chaos of business operations. John has developed tips to help grab hold in a crisis – tips he's used in corporate turnarounds. Tips for hiring and managing employees, and lessons from mismanaging employees. Tips on dealing with the two great, unsolvable issues of every organization – communication and focus.

When John wrote this book in 1994 he couldn't escape the feeling that somehow it had captured part of his soul.

Purchase copies for yourself and other CEOs, owners and entrepreneurs who appreciate the value of one good idea – let alone 100! Learn how the 80/20 rule works in your business; what are the only three jobs the CEO has; why you need fresh frogs.



Winning The Rat Workplace Race

130 pages, one strategy per page

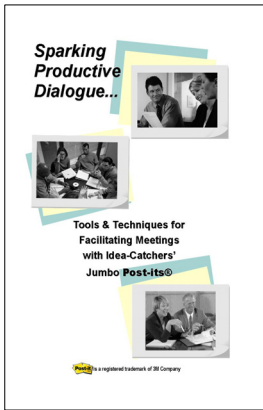
©1998 J. Adam Myrna and John W. Myrna published by *QuickStudy Press*

Over the years a common theme in planning meetings has been the problem with today's employees. Why don't they show greater commitment, work harder, be more appreciative, take risks, invest in their own careers, etcetera.

Everyone just assumes that employees know how to succeed and are choosing other behavior. Why should we make this assumption? If an employee never had a mentor, got bad advice, or started their career with an awful company or on the wrong foot, they may not have a clue as to what is expected and how to succeed.

At age 21 Adam Myrna, John and Mary's son, started a storefront business requiring that he hire people who, frankly, demonstrated many of the traits he demonstrated when working for others. After a year of this he decided the best way to learn how to motivate employees was to go work for someone else and be the employee he wished he could have hired.

This book grew out of Adam's strategies for being a successful employee. It blends Adam's experience with his dad's insights. Purchase copies for yourself, your children or your employees and: Learn how to read your boss's mind. Coach yourself to better pay. Avoid work foul-ups. Create your future with high-payoff behavior. Get promoted first. Survive the downsizing. Be the employee you'll want when you're the boss.



Sparking Productive Dialogue

Fresh Tools and Techniques
for Facilitating Participative Meetings
with Jumbo **Post-its**® from 3M

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Maria C. Birkhead, CPF, CPFA

If you're new at leading collaborative meetings and shudder at the thought of standing with marker in hand beside a chart stand, this primer is for you. In just 43 pages, you'll learn how to engage your team in using big self-stick notes to capture, organize, and prioritize their own ideas. The notes will free you from writing and documenting so that you can ask questions,

listen to the group, and encourage their progress. Folks in your meeting will do all the work for you and then thank you for it! The step-by-step instructions in this booklet have good facilitation techniques built in so you look good in front of your crowd, and there are even tips for livening things up and getting participants energized. Order special oversized **Post-it**® notes with the form included in the booklet to have everything you need to get started.

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Where the hell are we?

**How to implement
Total Quality Planning™**

John W. Myrna

The breakthrough step-by-step program that enables you to create a strategic long-range plan in under two days with immediate bottom-line impact.

Your executives reach consensus on where your company is today and should be in the future with a commitment to specific actions to create and control that future.

Where the Hell Are We?

112 pages, includes work sheets, 8½" x 11" workbook size ©2005 John W. Myrna, published by QuickStudy Press.

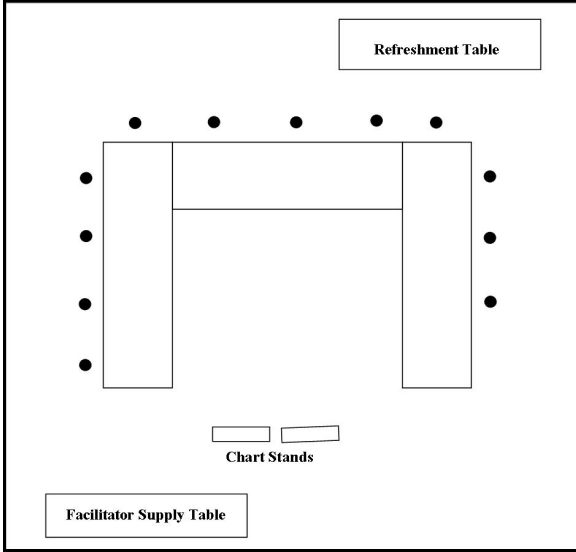
A detailed TQP™ guide, including sample plan, documenting the Total Quality Planning™ process. This pragmatic how-to book contains detailed instructions on executing John's breakthrough Strategic Planning process.

Everything you need from soup to nuts.

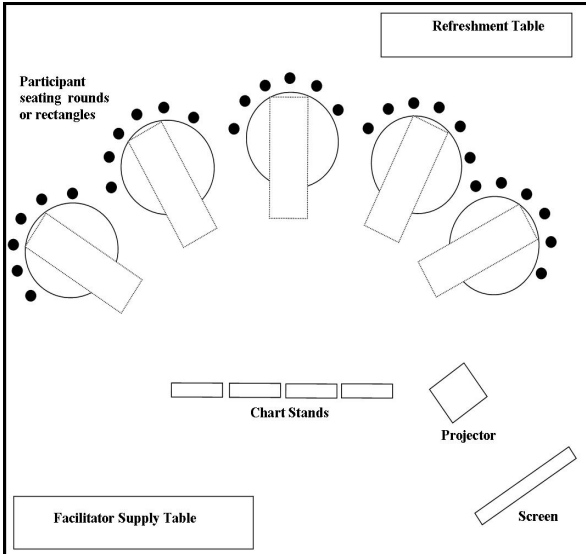
Purchase a copy of this book to learn exactly how you can apply strategic planning to your needs. Whether your goal is to learn enough so you won't be snowed by a professional facilitator, or to enhance your own facilitation, you'll find this unique book pragmatic and valuable.

Room Setup

Up to 18 participants



18 or more participants



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