

**INVOLVING EVERYONE
ESTABLISHES
A WINNING
ORGANIZATION**

A VICTORY GUIDE

James H. Saylor

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FORWARD

This book is part of the VICTORY series. For over 30 years, the pursuit of a simple, easy-to-use, proven, inexpensive management system for any organization has been my focus. MANAGING FOR VICTORY is this system. The MANAGING FOR VICTORY system includes:

Visioning creates a common focus

Involving everyone establishes a superior organization

Continuously improving achieves excellence

Training, educating, coaching, facilitating, mentoring develops a learning culture

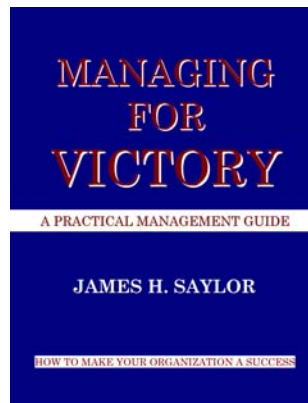
Owning the work fosters empowerment

Recognizing and rewarding builds high performance

Yearning ensures success

Customers drive VICTORY

Progressive Leaders guide VICTORY



ABOUT THE AUTHOR

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INVOLVING EVERYONE ESTABLISHES A WINNING ORGANIZATION

POWER OF PEOPLE

People are power. They are the most important resource. Everyone recognizes these facts. The power of people is in an essential tenet of the VICTORY framework. VICTORY requires the power of the individual and the power of teams. VICTORY requires the total involvement of everyone in the organization in a team-based, participative, organizational structure. Everyone includes all stakeholders in the organization including management, the entire workforce, suppliers, and customers.

Involvement requires the entire organization creating synergy. The foundation for involvement is a humanistic, participative, team-based organizational structure that values individual contributions. The target is synergy throughout the organization. Synergy is created by open and shared information with management of knowledge. In addition to the organization functioning as a team, the organization needs to launch many teams throughout the organization. Further, to assure effective involvement, teamwork must be verified regularly. Finally, involvement requires constant maintenance to keep people energized to sustain their commitment. Involving everyone considerations include:

Include everyone

Nurture a team-based organizational structure

Visualize synergy as the target

Open and share information

Launch teams throughout the organization

Verify teamwork regularly

Energize the organization/team constantly

Involve - **Include **E**veryone**

Everyone includes the entire organization, suppliers and customers.

The entire organization must be working together toward a common vision. Everyone includes the entire organization, suppliers, and customers.

Management

Management provides the organization's structure.

Management ensures that the total organization is geared to achieve victory. They provide the focus of the organization. Management designs the processes that are used to perform the work. Management must provide an organization where people can perform to the best of their capabilities. This involves providing everyone with the means to do their specific process. In addition, management fosters the development of a sense of pride and ownership of processes. They empower the workforce. They invest in education and

training. They guide cooperation and teamwork. They motivate actions through rewards and recognition. They guide the organization to victory. Managers' considerations include:

Manages systems and processes

Acts in a consistent manner

Nurtures workers involvement

Allows participative problem-solving and decision-making

Gives power to workers to perform processes

Encourages pride of workmanship

Removes barriers to work performance

Supports efforts

Workers in the Organization

Workers know their processes.

All the workers in the organization must be empowered to perform and improve their work with the intention of achieving excellence. In any successful organization, people are truly the most important resource. Therefore, people must be encouraged to be creative and innovative within all areas of their work. They must be allowed to make whatever changes are necessary within regulatory guidelines to perform the work and improve the system. In short, they must own their process. However, they also inform management so there are no surprises. Workers must be team players aware of both their individual and team contributions to achieving victory. Workers considerations include:

Work to perform and improve processes

Own their processes

Recommend improvements

Keep management informed

Encourage teamwork

Recognize individual and team contributions

Satisfy customers (internal and external)

Suppliers

The output to the customer is only as good as the input
provided by suppliers.

Suppliers are important players in any organization. Suppliers must be integrated into the organization's processes. The organization must ensure that suppliers understand the requirements of the organization. They must have specifications and standards to assure consistent quality. Further, the organization must develop a continuing relationship with its suppliers to ensure long-term customer satisfaction. This should include win-win relationships. It must also include incentives for achieving excellence. Suppliers must feel like they are important by letting them participate in teams and integrating them into internal processes. Supplier considerations include:

Survey your supplier to see if they know your requirements

Use suppliers that consistently meet your standards

Partner with suppliers for mutual advantage

Provide incentives for suppliers

Let suppliers participate in appropriate teams

Integrate suppliers into internal processes

Expect excellence from suppliers

Reduce the number of suppliers

Customers

Customers must drive the product and processes in the organization.

Customers drive victory. They can make or break an organization. This is one of the central themes of this book. Customers or the customer's voice must also be integrated into the organizational processes. This begins with communicating for results and weaving the customer's needs and expectations into all the organization's processes with total customer satisfaction as targets. The customer is special. The organization must have a customer focus with getting and keeping customers the goal. The customer or the customer's voice must be the leader of teams. Teams must operate with a customer focus. This is only possible with an intimate customer relationship as long-term partners built on mutual respect. Customer considerations include:

Can make or break an organization

Unique needs and expectations

Set total customer satisfaction targets

Treat customers as special

Orient everyone in the organization with a customer focus

Make getting and keeping customers the goal

Engage the “voice” of the customer in product/service design

Relate to customers as long-term partners

Involve - Nurture a Team-Based Organizational Structure

Teams give rapid, flexible response.

Today, teams are the organizational structure needed to meet the challenges of the global environment. High performing organizations require rapid, flexible response to beat the competition and achieve total customer satisfaction. This means the organization must be broken down into teams.

Teams with people working together for a common goal are absolutely essential to success. Teams maximize the use of human resources in the organization. Teams provide better decisions and the motivation to carry them out. Everyone can participate in a team. Relationships are nurtured for improved work coordination. Working together for a common goal leads to increased job satisfaction and rewards in the work itself. Teams foster freer contribution of information through more active communication. Further, the organization is thrust toward a common goal and an organization-wide perspective is fostered through teamwork. Teams provide the rapid, responsive organizational structure that is necessary for any organization to compete successfully in the ever-changing economic environment of today and the future. Team considerations include:

Teams are the organizational structure of choice

Emphasize the value of people

Acknowledge individual contributions

Make teams work

Team – Teams are the Organizational Structure of Choice

Teams must be the organizational structure of choice. The involvement of teams is critical to success in any organization of more than a few people. Teams simply provide better results. Teams should be the primary organizational structure to accomplish critical organizational missions. The organization's permanent organizational structure should be built from bottom up looking at teams. In addition, suppliers and customers should also be participating in teams within the organization.

Simply, it has been shown, without doubt that teams achieve more than a centralized functional organization structure. Therefore, a team-based organization is a vital element of the involvement element of MANAGING FOR VICTORY and any organization striving for success.

A team is a group of people working together for a common goal. Teams should not be confused with groups. A team shares responsibility, authority, and resources to achieve their collective mission. They feel empowered to do whatever is necessary within their defined boundaries. Action through cooperation is practiced both within the team and when acquiring support. Problem-solving and decision-making are natural activities. Effective, open, and full communication, especially listening, is prolific. The leader and the members possess a positive "can do" attitude even during difficult times. Team members motivate, respect, and support each other. Team members manage conflict. Team members build self-esteem and motivate other team members. They all contribute technical competence in their specialty as well as other skills. They acquire many skills to accomplish the mission and build and maintain teamwork. Effective teams realize that diversity, individuality, and

creativity are their greatest advantages. Individual and team contributions are recognized and rewarded appropriately. The team takes ownership and pride in their performance. Everyone is totally committed to cost, schedule, and quality standards of excellence, with total customer satisfaction the primary focus of all team activities.

Benefits of Teams

Teams provide the responsive work force required to survive in today's environment. Cooperation toward a common goal is essential for success. Some of the benefits of teams include:

Better decisions and motivation

Everyone can participate

Nurtures improved work relationships

Encourages rewards in work itself

Freer contribution of information

Increased communication

Thrusts an organization toward common focus

Supports an organization wide perspective

Types of Teams

There are many different types of teams. We all recognize types of sports teams. There are football teams, soccer teams, basketball teams, volleyball teams, and so on. Each of these teams has some characteristics in common. They all want to become champions. They all want to achieve victory. The players have specific positions. The positions have roles and responsibilities. There are certain rules. Also, each of the types of teams have differences. In some sports, there are

stars and role players. In other sports, the concept of stars is downplayed for the sake of the team. In some sports, players only play one position. In other sports, the players must know how to play all the positions. Just like in sports, the organization may need different types of teams. This is good. However in an organization, the type of team needs to be defined by the organization.

Teams can be functional or multi-functional. A functional team consists of members from the same discipline or organization. For example, an engineering functional team would be a team in which all the members work in the engineering department. A multi-functional team would have members from engineering, manufacturing, marketing, and others as appropriate.

In addition, a team may have each member perform only one task or each team member can do several tasks. The ideal team would be like a volleyball team where everyone can do all the tasks and team members are interchangeable.

Multi-functional and multi-tasking teams are the team type of preference for optimum success.

Team - Emphasize the Value of People

The team that maximizes its human resources wins.

People are the key to success in any organization. People do the work and improve the work. The successful organization aims to maximize the potential of human resources in an organization. This is accomplished by fostering both individual and team contributions to the organization. Individuals working smart and taking pride in their work are critical to accomplishing the mission. In addition, these individual contributions are multiplied through teams. Emphasizing the value of people considerations include:

Pursue a positive work environment

Encourage participation by everyone

Open communication

Provide an organizational system that meets individual needs

Let people perform

Enhance trust, cooperation, and teamwork

Team - Acknowledge Individual Contributions

I + I + I + I = Team

Although the saying goes “there is no “I” in TEAM,” each individual contributes to the team. Individual involvement concerns each person's contributions. In high performing organizations, the organization seeks to benefit from each individual in the work force. All individuals are different. Each individual is unique and valuable. This diversity is a distinct advantage in today's economic environment to the organization that learns to use this to improve their competitive position. People have a variety of attitudes, beliefs, perceptions, behaviors, opinions, and ideas. These are potential sources of creativity. Innovation can be gained from different competencies, abilities, knowledge, and skills of the work force. Each person's culture, background, and personality foster an individuality that can be used for the good of the organization. Creativity, innovation, and individuality can be the edge needed for growth. Therefore, individual differences are valued as an important resource.

Although each person is different, people generally want some of the same basic things. They want to be safe and secure, feel trusted, belong, be appreciated, feel important,

have pride in work, be involved, and have advancement and personal growth opportunities. The organization that provides a work environment where the individual can achieve all of these wants will be rewarded with high individual productivity.

The goal is the actual empowerment of everyone in the organization. Empowerment means all individuals in the organization have the authority to do what is necessary to perform and improve their work. Empowerment does not just happen. The organization cannot simply announce that people are empowered and expect it to work. Typically, empowerment comes in stages. First, people must trust the organization. Characteristically, most organizations have developed many adversarial relationships over the years. This has led to mistrust between management and workers, organizations and unions, and one department or function and another department or function. This barrier must be removed before an individual will become involved in any extraordinary effort. Restoring trust may take some time depending on the organization. This can only be accomplished by the actions of management working through structured activities. These activities should foster honest and open communication leading to some specific actions that build the trust.

Once trust is restored, people will begin to become involved in assuming more ownership of their work. At this point, the resources must be available to allow the person to take pride in their work. When pride in work is the norm, people can be completely empowered to provide total customer satisfaction.

With added emphasis on human resources, people must work smarter to perform and improve their work with a focus on customer satisfaction. People have always known best how to do things right, and do them better. However, neither the organization nor the people knew how to tap this resource for the benefit of the organization, the individual, and the customer. The organization must be transformed to

provide an environment where individuals can maximize their potential. At the same time people must be trained in a systematic process that provides them the capability to influence their work. When this is accomplished, individual involvement can reach its maximum potential. The following foster individual contribution:

Instill pride of workmanship

Nurture individual self-esteem

Develop an atmosphere of trust and encouragement

Involve everyone

Visualize a common purpose

Improve everything

Demand effective and open communications

Use recognition and rewards

Allow creativity and innovation

Lead by example

Team - Make Teams Work

$$1 + 1 + 1 + 1 = \text{infinity}$$

When teams work, we call this teamwork. Teamwork is the technique where individual team members work together to achieve a common goal. This involves cooperative relationships, open communication, group problem-solving and consensus decision-making. Teamwork can only be effective in an environment of honesty, trust, open communication, individual involvement, pride of

workmanship, and commitment. Specifically, effective teamwork involves the following:

Trust

Effective communication, especially listening

Attitude positive "can do"

Motivation to perform and improve

We mentality

Ownership of work with pride

Respect and consideration of others

Keeping focused on total customer satisfaction

Use Principles of Teamwork

In order to build and maintain teamwork, the team must obey some principles. The key principles of teamwork involve the following:

Keep focused on the mission; not on the person

Encourage open communication and active listening

Yearn for constructive relationships

In addition, the team must obey some principles to build and maintain teamwork over the long-term. The team must be continuously developing and maintaining teamwork. The individual team members and the team must receive appropriate recognition and rewards to maintain interest in teamwork. Further, all members must be involved in team activities to maximize the true potential of the team. Team members must have enough self-esteem to actively contribute. Communication is essential in any team activity. In addition, the strength of the team lies in the individuality

of each of the team members. Constructive cooperative relationships are critical both within and outside the team. Relationships are important between team members and with customers, suppliers, and other teams. All the members, especially the team leader, must set the example. Team members can develop the behaviors necessary to work as a team through observation. Ideas are the power of the team. All team members must be encouraged to continually contribute innovative and creative ideas. Above all, focus on the mission -- not the person. It is not personal. Teamwork demands an unrelenting devotion to a common purpose. The basic principles of teamwork can be summarized as follows:

Pursue team environment

Recognize and reward the individual and the team

Involve all team members

Nurture the self-esteem of all team members

Communicate freely and openly

Include individuality

Pursue constructive relationships

Lead by example

Encourage ideas from all team members

Stay focused on the mission

Building Teamwork

Team building requires continual diagnosing and improving the effectiveness of the team. In order to build the cohesiveness and effectiveness of the team, it is important to pay particular attention to the mission, roles and

responsibilities, group dynamics, and interpersonal relationships within the team.

The following are essential to build teamwork:

- Identify the team mission
- Establish team roles and responsibilities
- Understand team dynamics

Identify the Team Mission

The mission is the intended result. It provides the focus for all team activities. It gives the expected outcome(s) of the team. The mission provides an indication of the magnitude for the team. It should state the boundaries of the team to include specific process(es). It is important for the mission to define the authority of the team. Further, the team's resources to accomplish the mission must be identified. Normally the mission originates from outside the team. It comes in general terms from a variety of sources, i.e., management, customer. This general mission must be negotiated and clarified by the team.

The mission must be written in a mission statement. The clarification of the mission should be the first outcome related activity of the team. The mission statement must be understood, clear, and achievable. The team must reach consensus on a mission statement before doing any other team activity. Teamwork requires unrelenting devotion to a common purpose for success. The mission provides the common purpose.

Establish Roles and Responsibilities

Roles and responsibilities are the specific contributions expected from each team member to accomplish the mission. These contributions can include any formal or informal offering each team member brings to the team. Formal

contributions include the expected roles and responsibilities of a specific discipline, function or organization. Informal offerings are the contributions a team member can add as a result of personal strengths. Each team must develop their own unique roles and responsibilities based on the requirements of the mission and the capabilities of the team members.

Roles and responsibilities must be defined in a "living document" developed by the team. Each team member must have distinct responsibilities with corresponding accountability. The roles and responsibilities change as the team develops and the project progresses. Developing the initial roles and responsibilities should be the next team activity after agreeing to the mission statement. The roles and responsibilities should include:

Results expected - outcome(s) from each team member

Ownership - including the amount of control

Limits of resources - funds, equipment, and people

Empowerment with amount of authority

Standards focusing on customer satisfaction

The roles and responsibilities should include the expected outcomes from each team member. These should be stated in terms relating to the contribution to the mission. If possible, it should be stated in terms of metrics. In the initial stage of a project it may not be possible to include specific measurement, but performance measurements must be included as soon as possible. This allows team members to know exactly what they need to do.

Another part of roles and responsibilities involves ownership. The roles and responsibilities must state which processes each team member owns. This provides each team member with a statement of what they do.

Critical to performance of roles and responsibilities is the amount of resources available. Again, this should be detailed. This provides each team member a statement of what is available to achieve the mission.

Empowerment involves having the responsibly, authority and resources to do whatever is required to satisfy the customer and achieve the mission within defined boundaries. The key to empowerment is defined boundaries. Each team member must know the boundaries. These boundaries will change as the team develops and the project progresses. In the beginning of a project, team members usually do not have the capability to be fully empowered. As they are trained and gain new experiences, the team can assume more empowerment. Eventually the team can be fully empowered. This is when the maximum potential of the team can be realized through the creativity and innovation of the team members. This provides each team member with a statement of what they can do.

Standards are an essential part of roles and responsibilities. These are the accepted norms for all team members focusing on customer satisfaction. Standards must be a clear definition of what is acceptable under all situations. This provides each team member with a statement of what they all should do.

Specific Team Roles and Responsibilities

The team consists of team leader, team members, and sometimes a team facilitator. Each of these team players has a specific role. The team leader guides the team to mission accomplishment. The team members contribute toward achieving the mission. The team facilitator assists the team with focus, teamwork, methodology, tools, and techniques.

The team leader and team members roles depend on the category of the team. Figure 1 shows four categories of teams. The first category of team is the traditional directive

organization with a manager. The role of the manager in this team is to get the task accomplished. The role of the team member is strictly to perform the directed job. The second category of team is a participative organization. A leader guides the team to a common goal through a process involving all team members. The team members provide their expertise and cooperation. The third category of team is a collective self-led organization. In this team, ownership is shared by all team members. A team facilitator creates and maintains teamwork. The fourth category is an empowered organization. In an empowered organization, teams have the total responsibility, authority, and resources to perform and improve their process(es). In this category of team organization, a coach and/or resource person advises the teams.

Understand Team Dynamics

Each team must understand that although they are unique, all teams normally go through four distinct stages before they are truly performing as a team. The four stages of team development have various names the most common are: forming, storming, norming, and performing.

Each team must go through all four of the stages of team development before they reach synergy. There is no shortcut. The duration and intensity of each stage varies by team. It is important to maintain the focus and a positive attitude throughout all the stages for the team to achieve its mission.

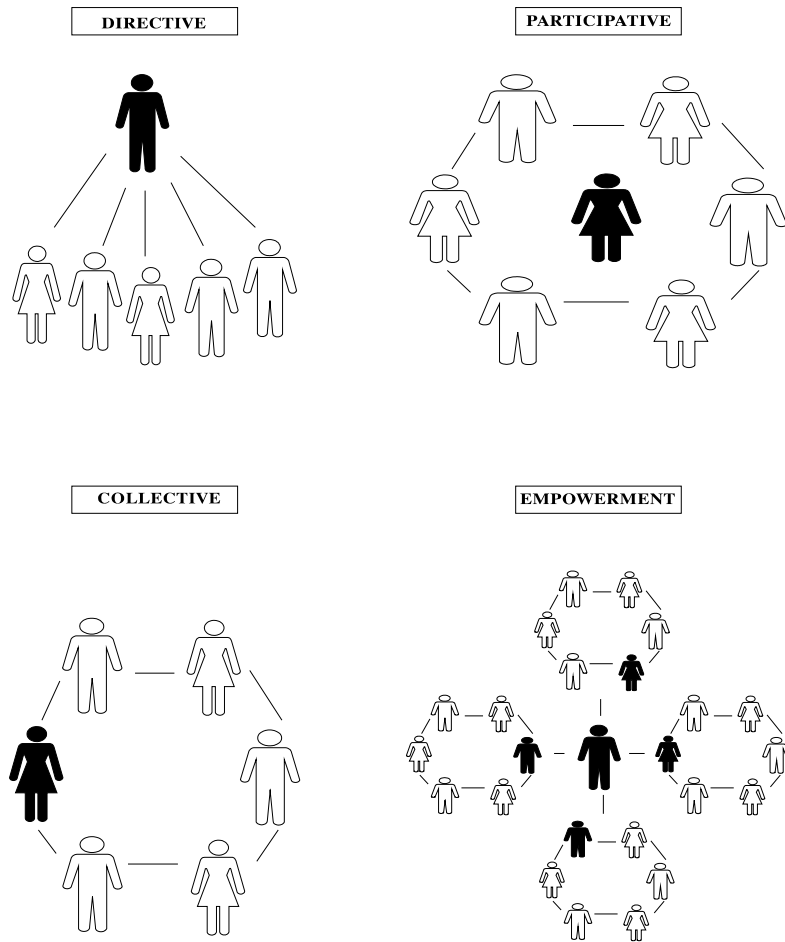


Figure 1 Team categories.

Below is a general description of each of the stages of team development.

Stage 1 - Forming

During the first stage, the team is becoming acquainted with each other and teamwork. Members are building rapport, honesty, trust, and open communication. They are trying to determine what it takes to fit in. The team members usually have great enthusiasm for the project. However, they do not know how to work as a team to accomplish it. During this stage the team is deciding what they need to accomplish and who needs to accomplish it.

Stage 2 - Storming

Stage 2 is characterized by being overwhelmed by the information and task. Sometimes power struggles, emotions, and egos become evident. This stage is the most difficult to overcome. Some teams never progress past this stage. If this happens, they should be disbanded. To move forward to the next stage, the team must find some small success as a group. Once the team understands they can perform as a team, the team usually progresses to the next stage.

Stage 3 - Norming

During stage 3, the team moves toward the mission. In this stage customer contact and measurements can help the team members start to assist each other and focus on the mission. This is the first stage where the team is actually working as a team. Here the team knows how to operate as a team.

Stage 4 - Performing

Finally in stage 4 the team becomes effective. The team members can to achieve the mission.

Inyolve - Visualize Synergy as the Target

One organization with one common purpose creates synergy.

One target of involvement is synergy. We visualize synergy as everyone working together in perfect harmony without conflict. The enemy of synergy is conflict. However, conflict exists whenever two or more people get together. Therefore, synergy focuses on managing conflict. Differences exist in every organization. These differences are an advantage to any organization that has learned to manage conflict. In addition, conflict can be positive and agreement may be negative. There are positive actions to manage conflict. The following are visualizing synergy as target considerations:

Observe differences as positive

Nurture conflict

Encourage conflict management actions to create synergy

One - Observe Differences as Positive

Differences exist in every organization. Our diversity is one of our major strengths. In teams, we must take advantage of differences to be successful. There are major benefits to be gained by difference. For example, an organization can use the people in its organization from different cultures and backgrounds to research a potential new market or product targeted toward a specific culture or background. Further, the organization can gain new ideas from a diverse work force. These new ideas can lead to improved operations, decreased cost, and/or reduced time. The following is a list of potential sources of conflict that can be beneficial to an organization:

Cultures and background

Opinions

Needs and expectations

Facts and perceptions

Levels, departments, and organizations

Interests, personalities, and egos

Competencies, knowledge, and skills

Targets, missions, goals, and objectives

One - Nurture Conflict

In order to nurture conflict, the organization must understand: conflict can be controlled, conflict exists in every organization, conflict can be positive, and agreement can be negative. Conflict can be controlled by:

Cooperate rather than compete

Orient toward the issue; not the person

Negotiate win/win solutions

Take an organization-wide perspective

Recognize conflict as natural

Observe empathy with other's views

Limit perceived status differences

The first step in nurturing conflict is recognizing that conflict exists. Everyone on the team must be constantly alert to the symptoms of conflict and groupthink. Some of the symptoms of conflict and groupthink are:

Stopping open communication

Yielding to win/lose solutions

Making little movement toward solution

Pressure to stop challenges

Taking sides (we/they)

Observing no building on suggestions

Members silent

Stopping any resistance

Conflict can be positive. Conflict leads to the pursuit of win/win solutions. It allows the team members to observe other team members' points of view. Conflict displays the team working through open communication. It forces the team to take an organization-wide view. By focusing on the mission, any conflict takes personalities out of the issue. Conflict invites trust and involvement while viewing the entire issue. It provides the opportunity to examine different sides of an issue. All this leads to effective consensus decision making, which establishes and maintains teamwork.

Pursues win/win situations

Observes other's point of view

Shows open communication

Instills an organization-wide view

Takes personalities out of the issue

Invites trust and involvement

Views the entire issue

Examines different sides of an issue

Agreement can be negative. This is commonly called groupthink. Groupthink is the tendency of the group to agree on almost everything and may have an adverse effect on the effectiveness of the team to achieve the mission. Groupthink comes from many sources. Sometimes groupthink results from the good intention of maintaining the cohesiveness of the team. In other cases groupthink stems from fear. The team members may be afraid of losing their job, losing face, or offending the leader, management or other team members. Regardless of the source, groupthink must be identified and controlled. The following are some specific actions to overcome groupthink:

Appoint a devil's advocate

Get open discussion on all issues

Recognize the impact of status differences

Examine all agreement without resistance

Evaluate all views/sides of the issue

One - Encourage Conflict Management Actions to Create Synergy

Synergy can be created by managing conflict during the day-to-day operations of the team. First, avoid any face saving situation. If honor and pride are at stake, people will defend their position even when they themselves realize they may not have the answer. Second, self-examination of attitudes is a necessity. Sometimes a person may develop an attitude triggered by some emotional response. This may be detrimental to teamwork. Focus on the mission and maintain a positive attitude throughout all team activities. Third, target win/win solutions. This allows the team to avoid we/they situations. Fourth, involve everyone in all team activities. People agree with their own contributions. If all

team members participate they will support the decision. Fifth, observe the limits of arguing. Arguing is useless. It does not lead to positive solutions. Sixth, nurture differences of opinion. Everyone is right in his or her mind. There are no right or wrong answers. Differences of opinion can be used to stimulate other ideas. Seventh, support constructive relationships. Relationships are the key to all teamwork. Build long-term relationships on a foundation of honesty and trust. This allows open and free communication that is the real key to conflict management. Conflict management actions are as follows:

Avoid "face-saving" situations

Continuously self-examine attitudes

Target win/win solutions

Involve everyone

Observe the limits of argument

Nurture differences of opinion

Support constructive relationships

Involve - Open and Share Information

Information for information's sake is worthless; shared information with a purpose grows exponentially.

Information is critical to success to any organization. This is especially true in a team-based organization. Information must be open and shared with everyone who has a use for it. The information must show the current status of the organization as well as projections for the future. It must provide an accurate and comprehensive picture of all supplier

requirements, internal process performance, and satisfaction of customer needs and expectations.

Information sharing is critical to showing management's commitment. This requires management to open up all information channels. It sometimes helps for management to translate traditional management information into a form that makes it easier for everyone to understand what he or she needs to do.

Critical performance information must be predominately displayed to all people who need it. This type of information should be on charts that can be easily read and updated. When possible, the performance feedback should be constant and immediate. This must include all critical performance information in an organization. Performance feedback is essential to success.

Manage Knowledge

Knowledge is power and technology can make it more powerful.

In many of today's organizations, a method to open and share information is called Knowledge Management. In any successful business environment, knowledge is king. Knowledge dominates. Knowledge provides value-added. Knowledge gains the competitive edge. Knowledge achieves total customer satisfaction. Knowledge Management integrates the organization's knowledge base into the organization.

Organizations must use its shared knowledge to target total customer satisfaction. The organization must institute a system for knowledge management that is useful for satisfying customers' needs and expectations. In its simplest form, total customer satisfaction information should be available both internally and to the customer. This should

include orders, order status, account and payment history, outstanding issues, product specifications and descriptions. In addition, a knowledge management system must include information learned throughout the entire organization. In small organizations, this may be simply providing a system that compiles, organizes and disseminates information throughout the organization. In medium organizations, this system might be expanded to an intranet program. In larger organization, it could include a formalized knowledge management information system.

Because of the importance of knowledge, knowledge management should be integrated into every organization. The organization must think of knowledge management as a system. As such the knowledge management system must be instituted like any other system initiative. A knowledge management system can be facilitated by telecommunication and information technology.

Knowledge Management Action Process

The knowledge management action process starts with leadership commitment and support. This should follow with the formation of a knowledge management team to direct the knowledge management initiative. The knowledge management initiative starts with the development of a knowledge management strategy for the organization. Next, a complete review of all information in the organization must be accomplished to determine what information is available now. Further, the organization decides what information they need for knowledge management. Then the organization gets rid of useless information and gathers new information. Finally, all the information is instituted in an organization-wide knowledge management system. This is summarized as follows:

Support open and sharing information

Have a knowledge management team

Agree on a knowledge management strategy for the organization

Review all information in the organization

Establish an organization-wide system to institute knowledge management

Involve - Launch Teams throughout Organization

A team-based organization starts with an executive team. This team consists of the top-management of the organization. As such, it would include the top manager and key players in the organization needed for critical mass. Ideally, the top leader in the organization should lead the executive team. It is critical to future success to have the top leader actively involved in certain activities, especially for the visioning process.

In the beginning, the executive team should be supported by a qualified coach and facilitator. The role of the coach and facilitator is to assist the top leader and the team in getting off to the right start. This support resource provides expertise, not available in the organization, to ease the transition to a team-based organization. In addition, this resource provides a different view of the organization, and he or she must be able to tell it like it is without regard to internal politics or personal job security.

This team forms the initial team-based organizational structure. It is recommended that this initial team resemble the day-to-day organizational structure as much as possible. Eventually, the team-based structure must be synthesized into a new way of organizational life.

The Executive Team determines the formation of additional teams throughout the organization. In addition to the Executive Team, it is recommended that a VICTORY Steering Team also be formed early in the process. The VICTORY Steering Team guides the organization to become champions as defined by the Executive Team. The VICTORY Steering Team consists of key players from the Executive Team along with key players or champions throughout the organization considering making the organization a champion. It is also recommended that representatives of suppliers, customers, and union, if appropriate, be invited to participate.

Once the top-level of teams is formed, the organization can institute teams throughout the organization. These teams can take many forms depending on the organization. For example, organizations can consider the following teams:

- Functional Organization Team
- Process Team
- Manufacturing Cell Team
- Process Improvement Team
- Problem-Solving Team
- Customer–Driven Project Team
- Program Team
- Product Team
- Quality Action Team

Establish a Support Structure for Teams

A team support structure is critical in the beginning of launching teams. The team support structure should be integrated into the team-based organizational structure. The team support structure should be geared to the specific requirements of the organization. Since each organization is different, some organizations will require more support than others.

A team support system can have many elements. Typically, a support system can include some or all of the following elements: coach, facilitators, and trainers.

Coach

A coach assists the organization in creating and maintaining the team-based organization. The coach is the key support for the Executive Team and Steering Team. The coach must be able to “tell it like it is.” This requirement,, more than any other, makes using an outside source for a coach usually a necessity. Additionally, a coach can function as the coach to the top executive of the organization, help instruct the organization in the fundamentals of teams, and assist in orchestrating the team-based strategy.

Facilitator

A facilitator assists the team but is not a working member of the team. The facilitator helps the team concentrate on the mission. The facilitator ensures the team stays focused, gives on-the-job training on the use of tools and techniques, provides lessons learned from other team experiences, and assists the leader with team dynamics.

Trainers

Trainers provide help in developing the necessary team skills, as well as specific tools and techniques. Trainers can also be used as facilitators, often very successfully.

Involve - Verify Teamwork Regularly

Teamwork is not static.

Periodically, the team should perform a teamwork self-assessment. Each team can develop their own assessment based on criteria for successful teams. A sample Teamwork Critique follows this paragraph. The teamwork assessment should be completed individually. Then the team should tabulate the results, evaluate specific areas for concern and discuss improvement.

TEAMWORK CRITIQUE

INSTRUCTIONS: Please rate the team based on the five-point scale below.

Circle the number on each scale that best states your opinion at this time.

Upon completion discuss with team.

TRUST

Is the level of trust among team members sufficient to allow open and honest communication without tension?

Closed/tense	1	2	3	4	5	Open/relaxed
--------------	---	---	---	---	---	--------------

EFFECTIVE COMMUNICATION, ESPECIALLY LISTENING

Does everyone have the chance to express their ideas?

No ideas expressed	1	2	3	4	5	Variety of ideas
--------------------	---	---	---	---	---	------------------

Do team members listen to each other?

Members do not listen	1	2	3	4	5	Members actively listen
-----------------------	---	---	---	---	---	-------------------------

ATTITUDE, POSITIVE “CAN DO”

Do team members display a willingness to take risks?

Avoid risk	1	2	3	4	5	Take risk
------------	---	---	---	---	---	-----------

MOTIVATION

Are team members actively participating?

Bored/withdrawn	1	2	3	4	5	Involved/committed
-----------------	---	---	---	---	---	--------------------

“WE” MENTALITY

Do team members demonstrate togetherness in words and actions?

Individual contribution	1	2	3	4	5	Team actions
-------------------------	---	---	---	---	---	--------------

Are decisions based on consensus?

Decision by one	1	2	3	4	5	Consensus decisions
-----------------	---	---	---	---	---	---------------------

OWNERSHIP

Do team members take the initiative to solve problems and/or improve their process as a natural course of action?

Only do what told to do	1	2	3	4	5	Take action to make things better
-------------------------	---	---	---	---	---	-----------------------------------

RESPECT, CONSIDERATION OF OTHERS

Do team members respect differences?

Avoid others	1	2	3	4	5	Respect others
--------------	---	---	---	---	---	----------------

Are people's differences managed to the team's advantage?

Conflict	1	2	3	4	5	Cooperation
----------	---	---	---	---	---	-------------

KEEPING FOCUS

Does the team remain targeted on vision, mission, and goals?

Off target/ Go on tangents	1	2	3	4	5	On target
-------------------------------	---	---	---	---	---	-----------

Involve - Energize the Organization and Team Constantly

Keep the passion within the team going strong.

The team needs constant energy to move through the stages of team development. In addition, once high performance is achieved it must be maintained over the long-term. Performance is the result of having both the ability and motivation to do the task. The organization must continuously develop ability and motivation. Ability is influenced by communication and competence. Motivation depends on satisfying the needs of the individual members. Teams inherently satisfy some higher order needs such as the intrinsic needs of sense of belonging, feelings of accomplishment, improved self-esteem, and opportunities for personal growth. However, teams also require extrinsic rewards. Extrinsic rewards are important for long-term teamwork, but they must be appropriate for the desired

outcomes. Before any rewards are instituted, they must be thoroughly analyzed to ensure fairness to everyone. Chapter 8 provides detailed information on recognition and rewards for building high performance

The following provides guidelines to energize the team focusing on ability and motivation:

Establish communication and information flow

Nurture individual pride

Encourage a sense of belonging

Recognize contributions of individuals and team results

Give team rewards

Invest in training

Zealously promote teams

Enjoy the experience

ACTION PROCESS

A major part of involving everyone in a team-based organization is launching teams. It starts with the Executive Teams and works its way throughout the entire organization. Launching a team correctly can be the difference between success and failure. The launching a team action process can be summarized as follows:

Link the team to a vision

Assure that a team is appropriate

Understand the team makeup

Nurture the team

Consider planning meeting(s)

Hold team members accountable

1. **L**ink team to vision. When launching a team, the first consideration is the link to the vision and/or mission of the organization. How will this team contribute to achieving a focus of the organization?

Action: Think of a team you want to launch in your organization.

Action: Link team to vision/mission.

Link to Vision/Mission

2. **A**ssure that a team structure is appropriate structure. A team may not always be necessary. Although teams are the organizational structure of choice, it may be more appropriate to take individual action, establish a task force, or use a committee.

Action: State the reason a team is the most appropriate organizational structure.

3. **U**nderstand team makeup. Once you know a team is organizational structure of choice, you need to decide the makeup of the team. As a minimum, the team consists of team members. In most teams, there is a leader and members. In addition, teams often require support.

Once you decide the makeup of the team, the success of the team depends upon the people on the team. The team leader and the team members must work together to ensure that the team achieves its mission. The criteria for successful team leader and team members vary by team. It is important to decide on specific criteria for the team leader and team members for each team.

Finally, you need to decide who will be on the team and the roles of each teammate.

Team Leader

Action: Determine Team Leader Selection Criteria

- Communicates, allows input, is willing to listen
- Interested, supportive, appreciative, humanistic, considerate
- Displays trustworthiness, honesty, integrity, ethics
- Is objective, open-minded, tolerant, reasonable, fair
- Delegates, trusts, empowers, allows room to achieve
- Motivates, challenges, inspires, is team oriented
- _____
- _____

Action: List Team Leader Candidate(s)

Action: Select Team Leader: _____

Team Members

Action: Determine Team Member Selection Criteria

- Positive attitude
- Willingness to participate
- Flexibility and adaptability
- Ability to do and follow at same time
- Stakeholder, owner, or expert in the process
- _____

Action: Select Team Member and List Role of Each Member

	Name	Role
Member1		
Member2		
Member3		
Member4		
Member5		
Member6		
Member7		

Action: Determine Support and List Role of Support:

	Name	Role
Coach		
Facilitator		
Trainer		

4. **N**urture the team

Item: Launch your team.

- a. When launching a team, it is important to spend time on the team process. Each person on the team needs to:
 - understand the purpose of the team
 - know what is in it for them
 - get to know other members of the team

- be familiar with team tools and techniques

Action: Provide the purpose of the team.

Purpose or Initial Mission Statement

Item: Provide an opportunity for members to discover “what’s in it for me.” Address potential concerns. Outline benefits to the organization. Allow time for individual benefits to emerge.

Action: “What’s in it for me.”

Item: Take time to get to know each other. The team leader and team members introduce themselves.

Action: Team member introduction

Name:

Function in the Organization:

Team Member’s View of Their Major Contributions to the Team:

Previous Team Experience:

Action Learn how to conduct effective team meetings. It is important to use appropriate meeting tools for effective and efficient meetings.

5. **C**onsider planning a meeting. Meetings are necessary to the success of most teams. The first meeting is the most critical meeting when launching a team.

Action: Check Your Meeting Plan.

Use the following checklist to see how you could plan for the first meeting and to improve meeting planning for the future.

- Team's Mission Statement
- Reason for the Team
- Team Leader
- Team Members
- Team Support

- Meeting set-up
 - Determine meeting date
 - Schedule meeting room
 - Arrange for participation by management/guests
 - Letter of Invitation/Meeting Notice
 - Meeting Focus Statement
 - Meeting Agenda (attach to Notice)
 - Meeting room set-up
 - Meeting materials

6. **H**old team members accountable. In teams that work, team members become accountable to each other. This is achieved by paying more attention to the team process during the launching stages of the team. At an early stage define expectations of team success. Team members have been exposed to effective teams both in sports and in the work environment. Based on these experiences, type of team desired, and teamwork considerations, decide as a team the characteristics that will make this team the “best” team.

Action: Define team success factors.

Each team member brainstorms an individual list.

Write each item from individual list on a flipchart.

Decide on five to ten “critical” success factors.

Action: Define team member contribution. Define what contributions from team members will be necessary to achieve the mission. Each team member brings specific knowledge and skills to the team. These will provide what contribution is expected from each team member to accomplish the mission. Every team member is assumed to be competent in his or her specific discipline or function. This

is the formal role of the team member. In addition, team members may be required to face many new challenges for the team.

Action. Have each team member write a list of contributions they believe will help the team achieve its mission.

Team Member Contributions Chart

Member 1	Member 2	Member 3	Member 4

***FORMING,
ACTION
PROCESS
WORKSHEETS***

Forming a Team

Forming the team is an important first step and vital to making teams work. This is where the team develops the foundation for working together toward a common goal. In many teams, success or failure is determined during this critical phase. The formation phase sets the stage for all other team activities. When forming a team, there should be consideration for both relationship building and project performance. However, it is necessary to spend more time in the beginning on relationship building. Resist the temptation to jump right into performing the task. An investment in relationship building will pay huge dividends later in the process.

Forming the team involves:

- ❑ Establishing a shared purpose
- ❑ Conducting effective meetings
- ❑ Building teamwork
- ❑ Deciding on a common process or methodology

For many teams, education and training are also essential for development of essential team building knowledge and skills during the formation stage. Specific training should be conducted at the time it is needed for it to be efficient and effective. It is wise to integrate the training requirements into the team process.

Forming a team considerations include:

Focus on a shared purpose.

Orient the team to each other and the team process.

Recognize the expected outcomes.

Model a common process or methodology.

When to Form a Team

Teams are the organizational structure of choice for flexible, rapid response to ever-changing customer needs and expectations. Teams provide:

Better decisions and motivation

Everyone a chance to participate

Nurturing of work relationships

Encouragement of rewards in work itself

Freer contribution of information

Increases in communication

Thrusts toward an organizational focus

Support for organization-wide perspective

Therefore, a team should be considered when:

- ✌ Starting a project
- ✌ Solving a problem
- ✌ Performing a mission
- ✌ Setting strategy
- ✌ Implementing a new program
- ✌ Needing high performance, flexible, adaptable structure
- ✌ Involving many different people to achieve a common goal
- ✌ Empowering a work team
- ✌ Supporting a systematic integration of the organization

A team is normally not appropriate when:

- ❑ Reacting to a crisis
- ❑ Seeking to complete a short-term objective
- ❑ Working on an individual basis would be superior
- ❑ Trying for excessive control of process and people

For some activities individual contributions, work groups, committees, or task forces may be more appropriate to use.

Preparing to Form a Team

Preparing to form a team involves:

- ❑ Establishing the purpose of the team
- ❑ Determining why a team is the most appropriate structure
- ❑ Deciding who should be part of the team

Establishing the purpose of the team

The purpose is the initial mission statement of the team. It should be drafted before forming the team. The purpose should:

Provide the project scope

Unite the team

Recognize the desired outcomes

Prevent misunderstandings of what is to be accomplished

Orient the team toward specific customer expectations

Set the common direction

Empower - authority, responsibility, and resources

Determining why a team is the most appropriate structure

A team may not always be necessary. Although teams are the organizational structure of choice, it may be more appropriate to take individual action, establish a task force, or use a committee. The reason for forming the team should:

Reinforce business and individual objectives

Encourage participation

Anticipate objections

Solicit commitment to achieve the mission

Obtain support for the team process

Nurture both relationships and results

Deciding who should be part of the team

The team leader is critical to the success of a team. Since the team leader guides the team to work together to achieve a common purpose, the team leader should be selected first. Then, the team leader should determine who should be team members. The specific composition of the team depends on the team's mission. The team should include representatives of all stakeholders in the process i.e. customers, suppliers, process owners, process workers, union leaders, etc. In addition, the people on the team should be kept to the absolute minimum needed to achieve the mission.

Selecting the Team

The success of the team depends upon the people on the team. The team leader and the team members must work together to ensure that the team achieves its mission. Selection criteria for the team leader and team members will vary by the team. It is important to decide on specific criteria for the team leader and team members for each team.

Team Leader Selection Criteria Example

- Communicates, allows input, is willing to listen
- Interested, supportive, appreciative, humanistic, considerate
- Displays trustworthiness, honesty, integrity, ethics
- Is objective, open-minded, tolerant, reasonable, fair
- Delegates, trusts, empowers, allows room to achieve
- Motivates, challenges, inspires, is team oriented
- _____
- _____
- _____
- _____
- _____

Team Member Selection Criteria Example

- Positive attitude
- Willingness to participate
- Flexibility and adaptability
- Ability to do and follow at same time
- Stakeholder, owner, or expert in the process
- _____
- _____
- _____
- _____

In many organizations, you will not be able to find the “ideal” candidates. The criteria listed above are the basic characteristics to be a player in the game. In addition, team leaders and members also need to possess or acquire many team skills to be competent. Therefore, the team, team leader, and team members usually require additional assistance. The team should be provided coaching, education and training, facilitating, and mentoring help as necessary. Further, it is a good idea to systematize an ongoing team leader and team member development process in the organization.

Team “Kick-Off Meeting” Checklist

- Team’s Initial Mission Statement
- Reason for the Team
- Team Leader Selection
- Team Members Selection
- Kick-off meeting set-up
- Determine meeting date
- Schedule meeting room
- Arrange for introduction by management
- Letter of Invitation
- Meeting Focus Statement (attach to Invitation)
- Meeting Agenda (attach to Invitation)
- Meeting room set-up (chairs, overhead, easel, etc.)
- Meeting materials (handouts, chalk, markers, etc.)

How to Form a Team

The action process steps for forming a team are as follows:

1. Provide the purpose of the team.
2. Link the purpose of the team to business focus.
3. Provide an opportunity for members to discover “what’s in it for me.”
4. Take time to get to know each other.
5. Learn how to conduct effective team meetings.
6. Prepare a team code of conduct.
7. Determine team meeting roles.
8. Establish a process for conducting meetings.
9. Learn the fundamentals of teamwork.
10. Clarify or write the team’s mission statement.
11. Define the roles of team members necessary to achieve the mission.
12. Establish a methodology for accomplishing the mission.

Forming a Team Worksheet

1. **Provide the purpose of the team.** This is the initial mission statement.

Purpose or Initial Mission Statement

2. **Link the purpose of the team to business focus.** This is the bond to the vision and mission of the organization. NOTE: This should be presented by top-manager/leader in the organization.

Business Focus Link

3. Provide an opportunity for members to discover “what’s in it for me.” Address potential concerns. Outline benefits to the organization. Allow time for individual benefits to emerge.

Acknowledge Potential Concerns

Potential Benefits to the Organization

Potential Benefits to Individual Team Members

able to work together on a common purpose using a specified process.

Meeting Considerations

Make a focus statement

Ensure team meeting roles are assigned and understood

Ensure the team uses an agenda

Take time to prepare, participate, and perform

Focus Statement

The focus statement provides the purpose of the meeting. Each team meeting must have a written purpose statement. If the team cannot write a focus statement, there is no need to hold a meeting.

Focus Statement

Focus for the meeting

Output expected from the meeting

Clear, concise, simple statement

Understood by everyone on the team

Start for the agenda

EXAMPLES

Informational Meeting Focus Statement:

The purpose of this meeting is to gain insight into the requirements of an effective meeting.

Action Meeting Focus Statement

The purpose of this meeting is to create a mission statement for this team.

Action: Identify the focus statement for this meeting or for the next meeting. The focus statement is:

Focus Statement

Agenda

An agenda acts as the meeting guide. It gets the team to focus on the meeting's desired outcome(s). An agenda encourages an effective and efficient meeting because it provides a meeting target. It documents key team activities and it acts to stimulate progress.

Agenda

Acts as the team's meeting guide

Gets the meeting's desired outcomes

Encourages effective and efficient meetings

Nurtures a focused team meeting

Documents key team activities

Acts to stimulate progress

🗒️ **Action:** Use the agenda format on the next page to complete an agenda for this meeting or use at the end of the meeting to formulate an agenda for the next meeting.

TEAM AGENDA

Date:

Start Time:

End Time:

FOCUS STATEMENT:

ITEMS:

- Item:
Owner:
- Item:
Owner:
- Item:
Owner:
- Item: Meeting Critique
Owner: Team Leader
- Item: Next Steps.
Owner: Team

ACTION ITEM	OWNER	STATUS

Comments:

6. Prepare a team code of conduct.

The code of conduct provides guidance for the team's behavior. The code of conduct considers "how" team meetings will be conducted. Each team makes their own unique rules. These rules are determined during the first team meeting by consensus. The code of conduct opens communications for the team in a non-threatening situation. They are posted during every team activity. Although they are established during the first team meeting, these rules can be changed at any time the team determines it is necessary. However, the rules are established by consensus in the first meeting to help build rapport.

Code of Conduct

Considers "how" the team behaves

Opens communication

Done by consensus

Each team makes its own unique rules

Code of Conduct Considerations

Commitment of team members

Owners of specific processes

Negotiation process

Decision making process

Unity issues

Communications procedures

Time management

Example of Items for Code of Conduct

- R**ely on facts, not opinions.
- U**nderstand others' points of view.
- L**isten actively to all ideas.
- E**ncourage others.
- S**ubmit assignments on time.

- O**pen communication of all issues.
- F**ocus on issues and mission; not personalities.

- C**ome to meetings on time.
- O**rient toward customer satisfaction.
- N**ever gossip about the meeting or team.
- D**ecide using consensus.
- U**se and build on everyone's ideas.
- C**onduct the meeting using an agenda.
- T**ake time to self-critique the meeting.

- Action:** Prepare the team code of conduct.

Code of conduct.

7. Determine team meeting roles. The following are suggested team meeting roles. If your team decides not to use a certain team meeting role, just write “N/A” in name column. In some teams, each meeting role is assigned to a primary and an alternate. In this case, write the primary name first and alternate second under the name column. Note: It is recommended that each team member have a team meeting role. In addition, detailed minutes need not be taken. The agenda provides a record of the team’s progress. It should be sufficient to inform people outside the team about the team’s activities. Typically, team members take sufficient notes to be able to actively participate and to inform other team members.

 **Action:** Assign meeting roles.

<u>Role</u>	<u>Name</u>
Meeting Leader	_____
Recorder	_____
Assumption Recorder	_____
Glossary Recorder	_____
Chart Scribe	_____
Action Item Monitor	_____
Meeting Facilitator	_____

8. Establish a process for conducting meetings.
This involves deciding what to do before meetings, during meetings, and after meetings. In general, each team member should do the following before, during, and after team meetings.

Before the Meeting

Brainstorm ideas regarding focus statement

Evaluate what you know

Formulate alternatives

Orient toward one alternative

Review the agenda

Ensure that you complete assignments

During the Meeting

Display teamwork

Understand the viewpoint of others

Remain focused

Involve yourself

Nurture others' ideas

Go for win/win

After the Meeting

Act to perform assignment(s)

Find necessary support and resources

Talk up team activities

Ensure team integrity

Review the next meeting's agenda

Meeting Critique

Some teams find it useful to perform a meeting self-assessment at the end of each meeting. This is particularly beneficial during the early stages of forming a team. The following is a sample meeting critique. The team uses this critique or it can design its own critique based on the team's past experience.

Meeting Critique

Communications - Was there open and honest communication?

Results - Was the focus statement accomplished?

Involve ment - Did everyone participate?

Training - Does the team require any training?

Individuals - Were individual contributions recognized?

Questions - Are there any items requiring further research?

Unity - Did the team work together? Any symptoms of conflict?

Escalate - Are there any issues requiring management help?


✎ **Action:** Decide the meeting process.

It is important to decide how the meetings will be conducted. For instance, some teams have the team leader prepare the agenda before the meeting. In other teams, the team prepares the agenda for the next meeting at the end of the current meeting. For each of the “what” items, mark **B** for before the meeting, **D** for during the meeting, and **A** for after the meeting in the “when” column. Assign responsibilities in the “who” column.

<u>What</u>	<u>When</u>	<u>Who</u>
Meeting notice _____	_____	
Focus statement _____	_____	
Agenda _____	_____	
Code of conduct _____	_____	
Assign action items _____	_____	
Make decisions _____	_____	
Monitor progress _____	_____	
Meeting critique _____	_____	
Perform action items _____	_____	
Get resources _____	_____	
Escalate issues _____	_____	

9. Learn the fundamentals of teamwork. It is critical when forming a team to develop a common understanding of the meaning of teamwork for your specific team. People have different experiences with teamwork. They usually associate teamwork with a particular sport i.e. football, basketball, baseball, soccer, volleyball, tennis, etc. Each of these sports are different. For instance, they require differing degrees of leadership, decision-making, and team and individual contributions. In addition, people on the team could be confused by previously participating in work groups, committees, and/or task forces.

The meaning of teamwork depends on your specific situation. There are different types of teams. Teams can be directive, participative, collective, and empowering.

 **Action:** State the type of the team.

Your team is the _____ type.

Teamwork

Teamwork is the technique where individual team members work together to achieve a common goal. This involves cooperative relationships, open communications, group problem-solving, and team decision-making. Teamwork can only be effective in an environment of honesty, trust, open communications, individual involvement, pride of workmanship, and commitment. Additional information is contained in the “Building Teams” Workbook.

Teamwork Considerations

Trust

Effective communication, especially listening

Attitude positive “can do”

Motivation to perform and improve

We mentality

Ownership

Respect and consideration of others

Keeping focus

Team Dynamics

Each team must understand that although they are unique, all teams normally go through distinct stages before they are truly performing as a team. The common stages of team development are:

- forming
- storming
- norming
- performing
- continuous improvement/close-out

Each team must go through four of the stages of team development before they reach synergy. There is no short-cut. The duration and intensity of each stage

varies with each team. It is important to maintain the focus and a positive attitude throughout all the stages..

Team Success Factors

 **Action:** State team success factors.

Team members have been exposed to effective teams both in sports and in the work environment. Based on these experiences, type of team desired, and teamwork considerations, decide as a team the characteristics that will make this team the “best.”

Steps

1. Each team member brainstorms an individual list.
2. Take one item from each team member’s list until all the items on each team member’s list is
3. Decide on five to ten “critical” success factors.

Mission Statement Considerations

Must be customer driven

Includes the purpose of the team

Sets the common direction for the team

Sets the expected results

Involves all team members

Opens and maintains communications

Nurtures long-term results and relationships

Action: Finalize the team mission statement.

Final Team Mission Statement

Determine specific outcomes.

Visualize what it will look like if the mission is accomplished. This is how you know there is progress or the mission has been achieved by the team.

Specific Outcomes

11. Define the roles of team members necessary to achieve the mission.

Roles are the specific contributions expected from each team member to accomplish the mission. Every team member is assumed to be competent in his or her specific discipline or function. This is the formal role of the team member. In addition, team members may be required to face many new challenges for the team. This is the informal role. This informal role may be such things as: coordinator, troubleshooter, trainer, facilitator, etc. Additional information is contained in the “Building Teams” Workbook.

✎ Action: Define team member roles..

Each team member writes formal and informal role they would like to play in order to help achieve the team’s mission.

Team Member Contributions Chart

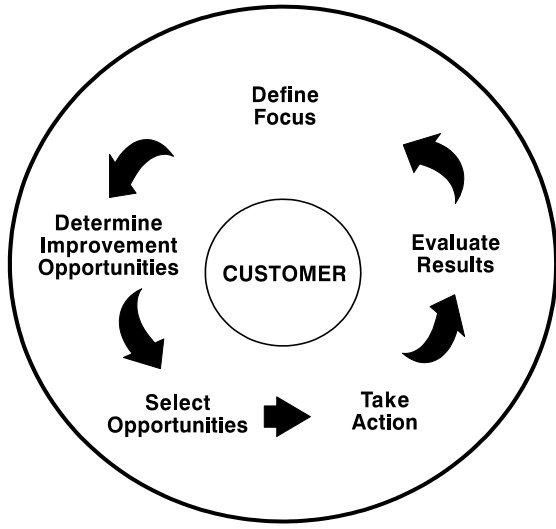
Member 1	Member 2	Member 3	Member 4	Member 5	Memb

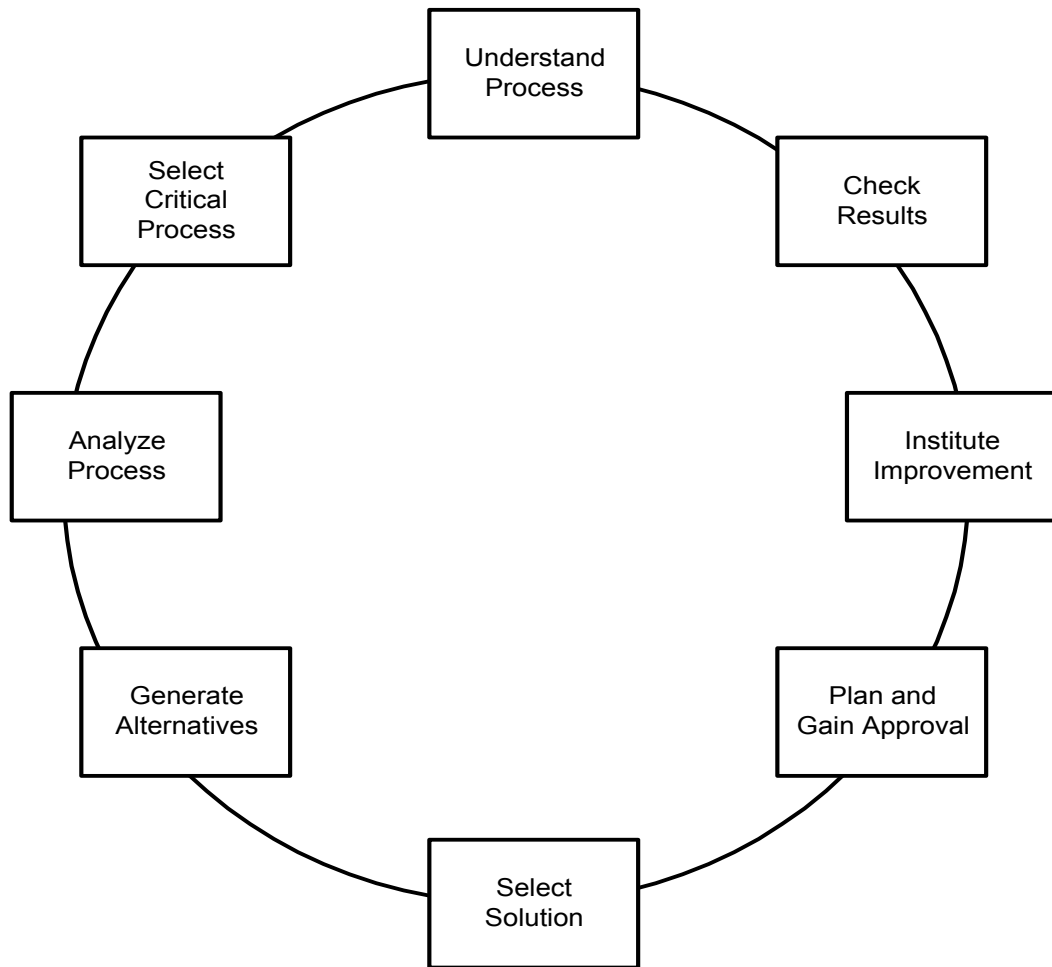
12. Establish a methodology for accomplishing the mission. Each team needs a common process. Examples of a common methodology are:

- Define focus, determine improvement opportunities, select opportunities, take action, and evaluate results. (figure)

- Understand process, select critical process, analyze process, generate improvement alternatives, select improvement, (plan, do, check, act), plan and gain approval, institute approved process, check results. (figure)
- Identify the problem, analyze the problem, generate alternatives, select a solution, implement the solution, evaluate
- Analyze, design, develop, implement, and evaluate.
- Plan, do, check or study, and act.
- Symptoms, diagnosis, approach, and action.
- Define customer expectations, understand processes, select improvement opportunities, analyze improvement opportunities, take action, check results, implement improvement, monitor results.

Additional information can be found in “Making Improvements/Problem-Solving” Workbook.





~~2~~ **Action:** Determine methodology.

In the space below, outline the process for achieving the mission.

Meetings can be more efficient through the use of meeting tools and participates actions before, during and after the meeting..

Meeting Considerations

Make a focus statement.

Ensure that meeting roles are understood.

Ensure the group/team uses an agenda.

Take time to prepare, participate, and perform.

When to Conduct a Meeting

A meeting should be conducted whenever a group of people need to get together to work toward a common focus. The focus could be to accomplish some action, or to provide some information.


A meeting should only be conducted when there is a specific action needing to be accomplished by the group, or for passing information.

An action meeting should be conducted when:

- Forming a new group or team
- Starting a new project
- Needing to accomplish an objective beyond the scope of one individual
- Solving a problem or improving a process
- Making a group/team decision


An informational meeting should be conducted when:

- Presenting a management message
- Advising of a change in focus, policies, procedures, etc.
- Motivating group/team members
- Welcoming a new leader or member
- Recognizing outstanding performance
- Learning from mistakes

 **Activity** Identify reasons when a meeting may be appropriate for your group/team.

What Does It Take to Make a Meeting Effective?

In order for your group/team to be able to conduct an effective meeting in your organization, the group/team needs to agree on the elements of an effective meeting. The following exercise will help the group/team determine “what it takes to make an effective meeting in your organization.” In addition, the exercise will assist the group/team in identifying the potential barriers to conducting an effective meeting.

 **Activity:** Determine barriers to an effective meeting and identify the elements of “best” meetings.



Instructions:

1. Each person visualize their experience in “best” meetings.
2. Brainstorm the elements of “best” meetings. Write this list in the left column below.
3. Agree on a list of elements for “best” meetings for your group/team.
4. Brainstorm possible barriers to “best” meetings in your organization. Write this list in the left column below.
5. Use the information in this workbook to remove the barriers and work toward conducting “best” meetings.

Goal: Conduct effective meetings.

“Best” Meetings

Barriers to “Best” Meetings

“Best” Meetings	Barriers to “Best” Meetings

Focus Statement

The focus statement provides the purpose of the meeting. This provides the common focus for the meeting content. Each meeting must have a written purpose statement. If the group/team cannot write a focus statement, there is no need to hold a meeting.

Focus Statement

Focus for the meeting

Output expected from the meeting

Clear, concise, simple statement

Understood by everyone on the group/team

Start for the agenda

EXAMPLES

Informational Meeting Focus Statement

The purpose of this meeting is to gain insight into the requirements of an effective meeting.

Action Meeting Focus Statement

The purpose of this meeting is to create a mission statement for this group/team.

 **Action:** Write a focus statement.

 **Instructions:**

Identify the focus statement for this meeting or for the next meeting. The focus statement is:

Focus Statement Draft

Focus Statement

Agenda

An agenda acts as the meeting guide. The agenda provides the focus for the meeting process. It gets the group/team to target on the meeting's desired outcome(s). An agenda encourages an effective and efficient meeting because it provides a meeting process. It documents key group/team activities and it acts to stimulate progress. An example of a format for an agenda is shown on the next page.

Agenda

Acts as the group/team's meeting guide

Gets the meeting's desired outcomes

Encourages effective and efficient meetings

Nurtures a focused group/team meeting

Documents key group/team activities

Acts to stimulate progress

AGENDA

Date: September 10, 2005
Start Time: 10:00 AM
End Time: 1:00 PM

FOCUS STATEMENT:

The purpose of this meeting is to form the Council.

ITEMS:


- Item: Senior Manager's Message Owner: Joe
- Item: Quality Management System Owner: Mary
- Item: Leading the Quest for Quality Owner: Jim
- Item: Next Steps. Owner: Group/team

STATUS

<u>ACTION ITEM</u>	<u>OWNER</u>	<u>STATUS</u>
Forming the Quality Council	Leader	Complete

Comments:

 **Action:** Prepare meeting agenda.

-  **Instructions:** Formulate an outline for an agenda for your next group/team meeting based upon the focus statement you wrote on the previous page.

AGENDA ITEM	OWNER

AGENDA

Date:
Start Time:
End Time:

FOCUS STATEMENT:

ITEMS:

STATUS

<u>ACTION ITEM</u>	<u>OWNER</u>	<u>STATUS</u>
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Comments:

Code of Conduct

The Code of conduct provides guidance for the group/team's behavior. The code of conduct considers "how" meetings will be conducted. Each group/team makes their own unique rules. These rules are determined during the first meeting by consensus. The code of conduct opens communications for the group/team in a non threatening situation. They are posted during every group/team activity. Although they are established during the first group/team meeting, these rules can be changed at any time the group/team determines it is necessary.

Code of Conduct Considerations

Considers “how” meetings are conducted

Opens communications

Done by consensus

Each group/team makes its own

Commitment of group/team members

Owners of meeting roles

Negotiation process

Decision making process

Unity issues

Communications

Time management

Code of Conduct Example

Rely on facts, not opinions

Understand others' points of view

Listen actively to all ideas

Encourage others

Submit assignments on time

Open communication of all issues

Focus

Come to meetings on time

Orient toward customer satisfaction

Never gossip about the meeting or group/team

Decide everything by consensus

Use and build on everyone's ideas

Conduct the meeting using an agenda

Take time to self-critique the meeting

Using the Code of Conduct

The code of conduct is posted at all group/team meetings in plain view of all participants. This can be posted on the wall or it can be placed in front of each participant. When a member notices a code of conduct issue, the item is pointed out. At that time the group/team takes action to resolve the code of conduct issue.

As the group/team progresses, the code of conduct should be revised as necessary. As the group/team moves through the stages of group/team development, the behavior of the group/team changes, this requires the group/team to re-evaluate the code of conduct to minimize and manage the potential conflicts.

How to Develop a Code of Conduct

The process for developing a code of conduct involves brainstorming items for consideration and then reaching consensus on the items included in the code of conduct. The code of conduct action process is as follows:

1. Review background information for a code of conduct.
2. Write “Code of Conduct” along the top of a flipchart.
3. Review meeting and group experiences.
4. Brainstorm ideas for code of conduct.
5. Clarify ideas and focus on consensus.
6. Get consensus on code of conduct items.
7. Finalize the code of conduct.

Developing a Code of Conduct Worksheet

1. **Review background information for a code of conduct.**

Introduction to Code of Conduct

Code of Conduct Considerations

Examples of Code of Conduct

Using Code of Conduct

2. **Write “Code of Conduct” along the top of a flipchart.**

CODE OF CONDUCT

3. **Review meeting and group/team experience.** Each group/team member mentally reviews their past experiences with meetings and working in groups. In addition, each group/team member analyzes their past interactions with the other members.

4. **Brainstorm ideas.** During the brainstorming session make sure the group/team follows the rules for brainstorming.

Brainstorming Rules

Record all ideas

Use creative, innovative thinking

Limit judgment until discussion

Encourage participation by everyone

Solicit quantity



Action: Brainstorm code of conduct items.



Instructions:

1. Each member takes five minutes to write items for code of conduct consideration on a blank sheet of paper.
2. The group/team conducts a round robin brainstorming session to list items on the flipchart.
3. Add items to the list by a freewheeling brainstorming session. This opens the list to everyone to add more items.

Code of Conduct Items

5. **Clarify ideas and focus on consensus.** Discuss each item requiring explanation.

6. **Get consensus.** The group/team needs to decide which items should be included in the code of conduct. The group/team must all agree to agree with items to be included in the code of conduct.
 - a. Discuss why consensus is important for this decision.
 - b. Evaluate each item as a yes, no, or maybe.
 - c. Get consensus on the yes items.
 - d. Get consensus on the no items.
 - e. Seek consensus on changing maybe items to yes or no.
 - f. Get everyone to personally agree to support the code of conduct.

7. **Finalize the code of conduct.** Write the final code of conduct on a flipchart and post.

Determining Meeting Roles and Responsibilities

Besides normal functions, meetings involve additional roles for group/team members. It is important to define specific meeting roles and responsibilities. For instance, the leader guides the team to mission accomplishment. However, the leader or members may guide certain parts of the meeting. Often a group/team needs a facilitator, this can be someone from outside the group/team or it can be a role of the leader or a specific member. In addition, the group/team may require various administrative assistance during the meeting. This could include such tasks as: charting, recording information, monitoring action items, documenting the agenda, keeping assumptions and glossary, and preparing reports.

Responsibilities

Meeting Leader

The role of the meeting leader is to guide the group/team to achieve the focus statement. The leader balances process and content with the emphasis on the meeting process. The leader oversees the preparation for the meeting, leads the meeting process, and ensures action and follow-up after the meeting. The meeting leader requires assistance from others to perform his or her role.

Meeting Leader Responsibilities

Leads by example

Empowers the group/team

Acts to guide the group/team to achieve the focus

Develops balanced participation of all members

Encourages teamwork

Recognizes and rewards appropriate behaviors

Member

The role of the member is just to do it. The group/team members must balance relationships and tasks. They must prepare for the meeting by doing research on agenda items. During the meeting, members must participate to their maximum potential. After the meeting, they must complete assignments.

Member Meeting Responsibilities

Maintain focus

Expect to contribute your ideas

Maximize the participation of others

Build constructive relationships with other group/team members

Encourage open and honest communication

Require win/win solutions

Support the group/team's decisions

Recorder

The recorder(s) serves as the memory. In some groups/teams, one recorder is sufficient. However, many teams, especially project, process improvement, or problem solving teams, use more than one recorder for assumptions, glossary terms, and action items. In addition, many groups appoint a chart scribe to capture ideas on flipcharts. Note: It is recommended that detailed minutes need not be taken. The agenda provides a record of the group's progress. It should be sufficient to inform people outside the group about the groups activities. Typically, members take sufficient notes to be able to actively participate and to inform other team members.

Recorder Responsibilities

Remember group/team meeting content

Emphasize recording of ideas

Communicate internal and external

Organize correspondence

Report progress

Document meeting

Facilitator

The facilitator drives the meeting process as a neutral observer. It is a role that can be assumed by the group/team meeting leader, a group/team member, or an person not part of the group/team. If the role of facilitator is assumed by group/team leader or group/team member, the facilitator role must take precedence over the group/team role. The role of the facilitator is to make it easier to accomplish the mission of the group/team by ensuring the group/team does the right things right.

Facilitator Responsibilities

Focus on the mission, objectives, and goals

Apply appropriate principles, methodology, tools, and techniques

Coach the leader and the group/team

Intervene when appropriate and necessary

Let the leader lead and the group/team perform


Initiate action to help the group/team manage conflict


Train specific skills

Assess performance


Take the initiative to ensure doing right things right


Encourage open and honest communication and active listening

 **Action:** Determine and assign meeting roles.

-  **Instructions:** In the table below, there are suggested group/team meeting roles. If your group/team decides not to use a certain group/team meeting role, just write “N/A” in name column. In some groups/teams, each meeting role is assigned to a primary and an alternate. In this case, write the primary name first and alternate second under the name column. Note: It is recommended that each group/team member owns a group/team meeting role.

Meeting Role	Primary	Alternate
Meeting Leader		
Recorder		
Assumption Recorder		
Glossary Recorder		
Chart Scribe		
Action Item Monitor		
Meeting Facilitator		

 **Action:** Determine meeting responsibilities.

 **Instructions:** For each meeting role selected above, write the specific responsibilities.

ROLE	RESPONSIBILITIES
Meeting Leader	
Recorder	
Assumption Recorder	
Glossary Recorder	
Chart Scribe	
Action Item Monitor	
Meeting Facilitator	

Preparing for the Meeting

The success of the group/team depends on the active involvement of all of the members. Members should participate fully in all meetings. The following are some meaningful guidelines to assist the group/team in conducting an effective meeting.

Brainstorm ideas. Review the focus statement and write your ideas of everything you know about the focus.

Evaluate what you know. Start with the ideas you brainstormed and gather any additional information you may need. Analyze the information trying to determine the specific opportunity, problem, or root cause.

Formulate alternatives. Generate a list of alternatives to accomplish the focus.

Orient toward one alternative. Determine one alternative you can support. This is your starting position based on the information you know. During the meeting, you may change your alternative based on additional information provided by other group members.

Review the agenda. Ensure that you are prepared with information, status, or assignments.

Ensure that you complete any assignments. The group depends on you to accomplish your specific actions. Even if you cannot make the meeting, try to make sure your assignments are on time.

Before the Meeting

Brainstorm ideas regarding focus statement

Evaluate what you know

Formulate alternatives

Orient toward one alternative

Review the agenda

Ensure that you complete assignments

Participating in the Meeting

During the meeting, obey the code of conduct and the principles of teamwork. In addition, speaking, listening, and cooperation are the key activities of all members. Speak to make your point and to present and clarify ideas. Listen actively to learn from others. Cooperate with all other participants.

Display teamwork. In all actions, work to build the team. Pursue an environment of trust. Reward and recognize both the individual and the team. Involve all team members. Nurture the self-esteem of all team members. Communicate freely and openly. Include individuality. Pursue constructive relationships. Lead by example. Encourage all team members ideas. Stay focused on the mission.

Understand the viewpoint of others. Try to see their point of view.

Remain focused. Pay attention to the specific desired outcomes. Don't try to jump ahead or push your own agenda.

Involve yourself. Actively participate and provide your expertise.

Nurture others' ideas. Look for ways to build on other team member's ideas.

Go for win/win solutions. Foster the synergy of all ideas rather than one idea over another.

During the Meeting

Display teamwork

Understand the viewpoint of others

Remain focused

Involve yourself

Nurture others' ideas

Go for win/win

Participating in the Meeting - Speak

During the meeting speak to make your point, and to present and clarify ideas.

Share information, but be short, simple, and concise. It is important to contribute to the meeting by ensuring the group/team knows your ideas, opinions, and position. This should be done while building credibility within the group/team. This will give you the best chance to actively participate.

Plan what you are going to say before you say it. This will help you focus and save valuable time. If possible write down your ideas then organize them to make your point.

Encourage the building of ideas. This stimulates interest and involvement. Although you or others may not have anything to initially contribute, many people can add their ideas to others.

Avoid personal remarks. Remember, it is not personal. Also, avoid any words that may trigger an emotional reaction. These types of words may refer to race, sex, religion, politics, etc.

Keep remarks focused on the mission, goal, problem, and issue. This keeps the group/team aimed in the right direction.

Speak

Share information, but be concise

Plan what you are going to say

Encourage building of ideas

Avoid personal remarks

Keep remarks focused on subject

Participating in the Meeting - Listen

Listening is essential during a meeting. In fact, it is the most important part of communication during a meeting.

Let the other person convey his/her message. Do not interrupt others while they are speaking.

Involve yourself in the message. Look for ideas you can support. Determine the central theme or concepts.

Summarize and paraphrase frequently. This provides the speaker with feedback on the success of the communication. It also is the only way to confirm your understanding of the information. Further, there may be another member who does not understand. All critical ideas must be repeated by another member and discussed to ensure clarity of ideas necessary for consensus decision-making.

Talk only to clarify while you are listening. Effective listening requires your full concentration.

Empathize with other people. In other words, put yourself in their shoes for awhile. You do not have to sympathize with them. Empathy helps you understand; sympathy may actually be a barrier.

Nurture active listening skills. Active effective listening is not natural. It requires a dedicated concentration of effort.

Listen

Let other person convey his/her message

Involve yourself in others' message

Summarize and paraphrase frequently

Talk only to clarify

Empathize with other people

Nurture active listening skills

Participating in the Meeting - Cooperate

Cooperation makes a meeting work.

Consider the self-esteem of others. This will give them the confidence to participate. Operate with the team--give others a fair chance. Do not go outside the team to seek action or talk about other members.

Observe others' reactions. This provides feedback on true reactions. Use this to find common ground for negotiations for win/win solutions.

Pursue a common focus. As long as the team focuses on a common goal, the team can work. Many times a common focus overcomes conflicts. Peer pressure to achieve a shared result overshadows the personal agenda of team members.

Establish open communications. This is necessary for any cooperative effort.

Recognize individual contributions. This helps stimulate more participation. Allow positive conflict. This leads to consensus decision-making. The team will support a decision better if positive debate was endorsed during the meeting.

Trade-off ideas with the group. This distributes ownership to the whole team.

Encourage trust. This is the most important ingredient to developing and keeping cooperation in the team. Without trust, there can be no real cooperation during the group/team meeting.

Cooperate

Consider the self-esteem of others

Operate within the group/team

Observe others' actions

Pursue a common focus

Establish open communications

Recognize individual contributions

Allow positive conflict

Trade off ideas of the group/team

Encourage trust

Performing After the Meeting

Once the meeting is over, the real group actions are performed.

Act to perform assignment. This is when the group/team members act to perform assignments and action items.

Find support and resources. This may be necessary after the meeting. A member coordinates with management, or a support function, to ensure the group can complete actions or implement a solution.

Talk up group/team activities. All members must talk up group/team activities to develop pride for their team in the organization. This gives all group members a feeling of belonging to a worthwhile group. It also helps promote teamwork throughout the whole organization.

Ensure group/team integrity. Members do not gossip about group activities or other group members.

Review the agenda of the next meeting. This starts the preparation before the next meeting.

After the Meeting

Act to perform assignment(s)

Find necessary support and resources

Talk up team activities

Ensure team integrity

Review the next meeting's agenda

Meeting Critique

Some teams find it useful to perform a meeting self-assessment at the end of each meeting. This is particularly beneficial during the early stages of forming a team. The use of a meeting critique provides a means to develop the effectiveness of the team during meetings. It also fosters teamwork through finding successes. The following is a sample meeting critique. The team uses this critique or it can design its own critique based on the team's past experience. The meeting critique should be conducted during the last few minutes of each team meeting.

Meeting Critique

Communications - Was there open and honest communication?

Results - Was the focus statement accomplished?

Involvement - Did everyone participate?

Training - Does the team or any member require any training?

Individuals - Were individual contributions recognized?


Questions - Are there any items requiring further research?

Unity - Did the team work together? Any symptoms of conflict?

Escalate - Are there any issues requiring management help?

Establishing a Process for Conducting Meetings

Establishing a process for conducting meetings involves deciding what to do before meetings, during meetings, and after meetings.

 **Action:** Decide the meeting process. It is important to decide how the meetings will be conducted. For instance, some teams have the team leader prepare the agenda before the meeting. In other teams, the team prepares the agenda for the next meeting at the end of the current meeting. For each of the “what” items, mark **B** for before the meeting, **D** for during the meeting, and **A** for after the meeting in the “when” column. Assign responsibilities in the “who” column.

WHAT	WHEN	WHO
Meeting notice		
Focus statement		
Agenda		
Code of conduct		
Assign action items		
Make decisions		
Monitor progress		
Meeting critique		
Perform action items		
Get resources		
Escalate issues		

How to Conduct an Effective Meeting

The action process steps for conducting an effective meeting are as follows:

1. Establish foundation for effective meetings.
2. Determine the focus statement.
3. Review experience.
4. Brainstorm ideas for agenda items.
5. Prepare a list of agenda items and assign owners to the items.
6. Finalize the agenda.
7. Prepare for the meeting.
8. Participate in the meeting.
9. Perform assignments after the meeting.

Meeting Preparation Checklist

ITEM	CHECK
Determine meeting date	
Schedule meeting room	
Arrange for outside assistance for meeting	
Prepare Meeting Notice	
Prepare Meeting Focus Statement (attach to notice)	
Prepare Meeting Agenda (attach to notice)	
Send Meeting Notice prior to meeting	
Prepare meeting handouts	
Set-up meeting room (chairs, overhead, easel, etc.)	
Arrange seating (circle or U-shape seating)	
Ensure equipment operates properly	
Check equipment supplies i.e. spare bulb	
Have meeting materials (handouts, chalk, markers, etc.)	

Conducting an Effective Meeting Worksheet

1. **Establish foundation for effective meetings.**

- Understand elements of “best” meetings
- Use agenda with focus statement
- Develop and use a code of conduct
- Determine meeting roles and responsibilities
- Use a meeting critique
- Establish a meeting process

Note: This step is particularly important during the initial meeting. During subsequent meetings, appropriate information in this step should be reviewed and updated as necessary.

2. **Determine the focus statement.** What is the purpose for having the meeting?

Is the purpose to seek action or convey information?

Is a meeting the best method to accomplish the focus statement?

Write the Focus Statement

3. **Review experience.** Each meeting participant reviews his or her experiences with the focus statement ideas. What can the participant contribute to help achieve the focus statement?

4. Brainstorm ideas for agenda items.

5. Prepare a list of agenda items and assign owners to the items.

6. Finalize the agenda.

<u>AGENDA</u>		
Date:		
Start Time:		
End Time:		
FOCUS STATEMENT:		
ITEMS:		
<input type="checkbox"/>	Item:	Owner:
<input type="checkbox"/>	Item:	Owner:
<input type="checkbox"/>	Item:	Owner:
STATUS		
<u>ACTION ITEM</u>	<u>OWNER</u>	<u>STATUS</u>
Comments:		

7. **Prepare for the meeting.** What can I contribute to achieve the focus statement?

8. **Participate in the meeting.** How did I contribute to achieving the focus statement?

9. **Perform assignments after the meeting.** What assignments must I complete before next meeting?
