



MASTERFUL MEETINGS *Ignite a Meetings Revolution!*

Why it works:

This course is designed to help leaders like you create a meetings revolution inside your organization. Are you tired of meetings that don't start on time, don't have a purpose, don't stay on topic and don't reach a decision? This course equips you with a step-by-step guide for creating a culture in your organization that revolutionizes the way people run meetings. Starting with an understanding of the common problems with meetings, this course presents a vision of *Masterful Meetings* and provides specific techniques you can use right away for improving your meetings. Energetic instructors use our PDI process (practical, dynamic and interactive) to keep you engaged and the class highly interactive.

Learn how to:

Dramatically improve the quality of meetings by:

- Eliminating unnecessary meetings
- Discovering the most important component of a meeting
- Determining the right participants
- Developing a results-driven agenda
- Starting meetings on time with everyone present
- Effectively dealing with dysfunctional behavior
- Increasing productivity and efficient use of time
- Keeping meetings on track and focused
- Bringing groups to consensus
- Closing the session with clarity and commitment

Ideal for:

Meeting leaders seeking to drastically improve the quality and output of their meetings, including supervisors, managers, product & project managers, total quality facilitators, trainers, strategic planners, business analysts and reengineering teams

Duration:

2 Days

Objectives:

- Identify the role of meetings, the different meeting types, and how to avoid unnecessary meetings
- Describe typical problems with meetings
- Define the qualities of *Masterful Meetings*
- Provide a starting set of *Meeting Rights* to empower participants
- Describe detailed meetings techniques for achieving *Masterful Meetings*
- Give practice in using the meeting techniques to run *Masterful Meetings*
- Provide a roadmap for transforming meetings throughout your organization
- Provide techniques to use when you are not the meeting leader

Agenda:

Day One

- Getting Started
- Building the Vision
- Establishing Meeting Rights
- Preparing for the Meeting
- Starting the Meeting
- *Exercise #1: Starting the Meeting*
- Running the Meeting
- Gathering Information
- Review

Day Two

- Review
- Closing and Follow-up
- What if there is Dysfunctional Behavior?
- What if there is Disagreement?
- *Exercise #2: Handling Dysfunction*
- What if the Leader is not Leading?
- What if the Meeting is Virtual?
- Developing Your Master Plan
- Review/Close



Why This Course?

Surely you have sat through them. Those meetings that...

- Don't start on time
- Don't have a purpose
- Don't stay on topic
- Don't resolve the critical issues
- Don't have the right people present
- Don't engage those who are
- Don't reach a decision
- Don't produce an outcome worthy of the time invested

Why do we tolerate bad meetings? They just waste time and resources! Have we let the bar be lowered so much that bad meetings have become the norm? Why do we allow it? Enough is enough. It is time to declare war!

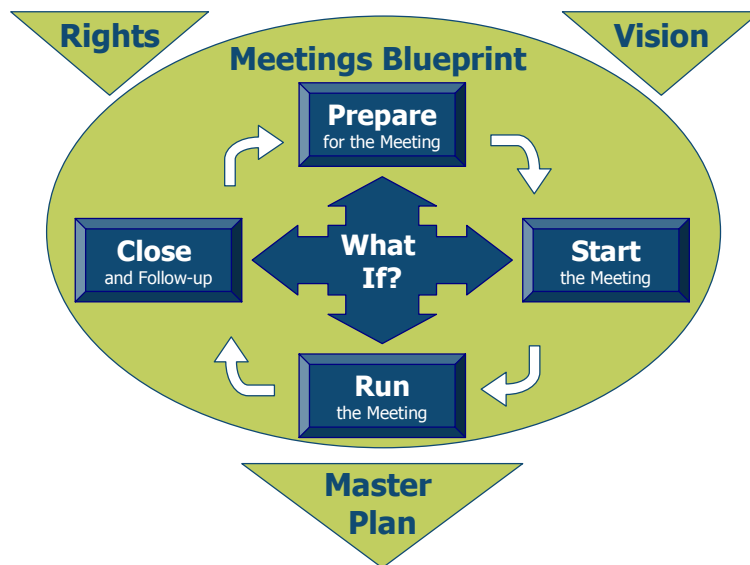
This course equips you with a step-by-step guide for igniting and sustaining a meetings revolution. Create a culture in your organization that permanently changes the way people run meetings.



What is Covered

The course covers the four components of the *Masterful Meetings* Framework. Together, these components provide a vehicle for you to ignite a revolution that transforms the meetings throughout your organization.

Masterful Meetings



Your Meeting Rights: Discover the tools for empowering meeting participants to make bad meetings unacceptable.

Masterful Meetings Vision: Understand the vision of *Masterful Meetings* and the role meeting leaders and meeting participants play in realizing this vision.

Masterful Meetings Blueprint: This course provides a roadmap for meeting leaders to prepare, start, execute, and close *Masterful Meetings* by overcoming a series of "what if" scenarios.

- What if there is dysfunctional behavior?
- What if there is disagreement?
- What if the meeting leader is not leading?
- What if the meeting is virtual?

The Master Plan: While the *Masterful Meetings* Blueprint provides a guide for meeting leaders to run a great meeting, the Master Plan provides a guide for organizational leaders to transform all meetings inside the organization.

The Master Plan covers key steps for transformation, including:

- Gaining buy-in from the organization's leaders to implement the *Masterful Meetings* Framework.
- Establishing a baseline that measures the current effectiveness of meetings.
- Putting in place a transformation team.
- Providing support and skill-building opportunities.
- Implementing accountability.
- Rewarding successes.
- Measuring and sustaining progress.



What Makes This Course Unique: The PDI Difference!

The focus on meetings transformation is not just improving you meetings.

- Bad meetings waste time, consume resources, have a negative effect on the passion we have for our work, and often result in bad decisions that are poorly thought through, void of innovation and missing the necessary support for success.
- This course is designed for meeting leaders and explains how to bring about a comprehensive transformation of meetings throughout your organization.
- This organizational approach to meetings makes this course unique and attractive as an organization-wide purchase for every manager and employee to participate in transforming meetings.

Masterful Meetings is taught using the **PDI** style common to all of our courses: **practical, dynamic, interactive.**

Practical...You'll be able to use it! Expect concrete situation-specific techniques that you can apply right away.

- ❑ We take the "touchy-feely" concepts - like engaging a group and consensus building - and isolate the detailed, step-by-step strategies. We break the most difficult concepts down to their critical elements for success.
- ❑ We let you know what techniques work; we show you why they work, how they work and when and where to use them.

Dynamic...You'll get into it! Expect energetic instructors that consistently promote high-energy and fun to keep you engaged.

- ❑ Our facilitators are trained in using level 3 energy – dynamic techniques for engaging and focusing groups.
- ❑ We use the "WII-FM" principle to excite participants by letting them know "What's In It For Me."
- ❑ Throughout the session we use a variety of techniques to keep the energy high and participants engaged.

Interactive...You'll really get it! Expect intensive interaction, practice and feedback throughout the session.

- ❑ We use practice sessions to ensure active learning. You will have numerous structured opportunities to both exercise the techniques taught and receive feedback.
- ❑ We reinforce learning through "backward buildup" by constantly engaging teams with content specific questions about material previously covered.
- ❑ We use team quizzes and interactive games (e.g., Jeopardy, Three Question Panic) requiring team decision and action to vary the pace and increase comprehension.

The cumulative result of employing these techniques is the creation of a learning environment which encourages participation, engagement and application.



The Instructor as Role Model

While the timing varies by class and by participant, at some point over the course of the class sessions, participants realize that the techniques being taught are simultaneously being modeled by the instructor. They begin paying attention to how instructors introduce exercises, how they ask questions, how they use the pen, how they keep the group focused and on track. Instructors must not only be able to teach the material, they also must be instinctive and proficient users of the techniques as well. For this reason, our instructor certification program is extensive.



Practice Session

In the first hour of the class session, the participants learn by example that practice does not "make perfect"; rather, a continuous cycle of practice, feedback, and application are critical. Accordingly, the full course includes two practice sessions:

Exercise 1 – Starting the Meeting

Exercise 2 – Handling Dysfunction



Other Features

Spring Forward – We encourage you to implement you learning by providing a 60-day check-in to confirm your progress. At the end of the course you will be asked to indicate at least one technique you will implement in the next 30-45 days. We then follow up to have you report your progress.

The Secrets of Masterful Meetings –You also receive this book! Written by our CEO, this book is becoming THE handbook for meeting leaders to use in running meetings.



Course Workbook Outline

I. Establishing Your Meeting Rights

- A. Your Meeting Rights
- B. The *Masterful Meetings* Framework
- C. What This Course Will Do For You

II. Building the Vision

- A. Problems to Eliminate
- B. The Characteristics of *Masterful Meetings*
- C. What Do *Masterful Meeting* Leaders Do?
- D. What Do *Masterful Meeting* Participants Do?
- E. Special Topic: Meeting Types
- F. Eliminating Meetings
- G. The Secrets to a Meeting Vision

III. Preparing *Masterful Meetings*

- A. Decide the Meeting Purpose
- B. Define the Meeting Products
- C. Select the Participants
- D. Identify Probable Issues
- E. Develop the Agenda
- F. Determine Key Processes and Timings
- G. Determine Meeting Date, Time, and Location
- H. Develop and Distribute the Meeting Notice
- I. Hold Preliminary Discussions as Needed
- J. Prepare the Room and Other Logistics
- K. Prepare Your Opening Words
- L. Checklist for Preparing

IV. Starting

- A. Start the Meeting on Time
- B. Deliver the Opening
- C. Engage Participants (The Starting Question)
- D. Confirm the Agenda
- E. Review the Ground Rules
- F. Review the Parking Boards
- G. Make Introductions if Needed
- H. Checklist for Starting

V. Running the Meeting

- A. Focus the Participants (Checkpoint)
- B. Instruct Through Clear Directions (PeDeQs)
- C. Record Relevant Information
- D. Seek Consensus Before Moving On
- E. Track Time Against the Agenda
- F. Checklist for Running a Meeting (FIRST CLASS)

VI. Gathering Information

- A. Listing to Gather Details
- B. Grouping to Categorize (Affinity Diagram)
- C. Brainstorming to Generate Ideas
- D. Prioritizing: The Dot Method (Multi-Voting)
- E. Question & Answer
- F. Small Group Break-out
- G. Feedback (Pro-con Chart)

VII. Closing and Follow-up

- A. Review Items Covered in the Meeting
- B. Confirm Decisions Made
- C. Address Outstanding Issues
- D. Assign Actions
- E. Evaluate the Meeting
- F. Thank Participants and End the Meeting
- G. Document and Distribute Meeting Notes
- H. Follow-up to Hold People Accountable
- I. Sample Meeting Notes
- J. Checklist for Closing and Follow-up

VIII. What if There is Dysfunction?

- A. The Cell Phone Junkie
- B. The Door Slammer
- C. The Drop-out
- D. The Interrupter
- E. The Late Arriver or Early Leaver
- F. The Loudmouth
- G. The Naysayer
- H. The Physical Attacker
- I. The Storyteller
- J. The Topic Jumper
- K. The Verbal Attacker
- L. The Whisperer
- M. The Workaholic
- N. Group: Low Energy
- O. Group: Time Pressures

IX. What if There's Disagreement?

- A. Defining Agreement
- B. An Alternative: Five-Finger Consensus
- C. The Three Reasons People Disagree
- D. Level 1: Lack of Shared Information
- E. Level 2: Different Experiences or Values
- F. Level 3: Outside Factors
- G. Solving Level 3: Take it to a Higher Source
- H. Solving Level 1: Delineation
- I. Solving Level 2: Strengths, Weaknesses, Merging

X. What if the Leader is Not Leading?

- A. The Meeting Starts Without a Purpose or Agenda
- B. The Discussion is Getting Off Track
- C. Someone is Dominating or Someone Drops Out
- D. Decisions or Actions are Not Being Documented
- E. The Meeting is About to End Without a Review

XI. What if the Meeting is Virtual?

- A. Preparing for the Virtual Meeting
- B. Executing a Virtual Meeting

XII. Developing Your Master Plan

- A. Success Factors for Meetings Transformation
- B. Sample Master Plan
- C. Introduce the Concept to the Leadership Team
- D. Seek Leadership Team Commitment
- E. Orient the Transformation Team
- F. Hold a Joint Meeting of the L-Team and the T-Team
- G. Communicate the Intent to Proceed
- H. Finalize Your Meeting Rights and the Master Plan
- I. Gain Approval of the Master Plan
- J. Implement the Meetings Survey
- K. Execute the Master Plan
- L. Hold Formal Progress Reviews Quarterly