

# Meet Less, Meet Better

Support Project Success by Optimizing Your Meetings



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# Outline

- Should We Meet?
- Meeting Scope & Objectives
- Preparing for Success
- Managing the Meeting

# Meeting When It Matters

## Effects of Meeting Culture

Responses from Senior Managers to 2017 Survey



Time spent per week in meetings (1960s)

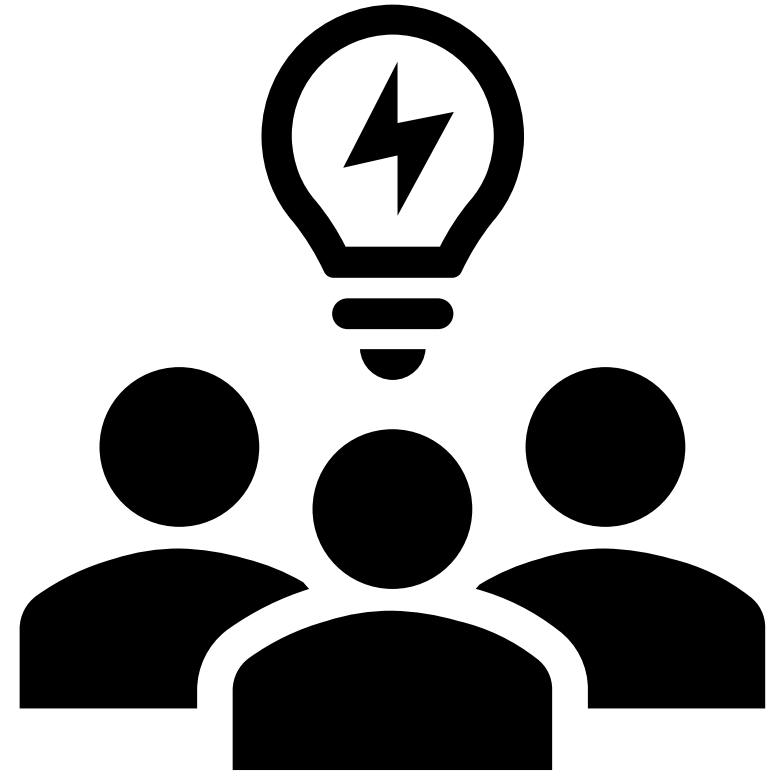


Time spent per week in meetings (2017)



# What Warrants a Meeting?

- Group decision-making
- Discussion, brainstorming, ideation
- Fostering connection



# But It's Not *MY* Meeting!



# Signs of a Bad Meeting

- Multi-tasking
- Lack of participation
- Information available elsewhere
- No new insights, actions, or decisions
- No shows
- Participant feedback



# Conducting a Meeting Audit

- List out all your meetings for next month
- Look for:
  - Symptoms of bad meetings
  - Outcomes
  - Duplication
- Decide for each meeting:
  - Is it needed at all?
  - Is it needed, but at a different frequency?
  - Is it needed, but with adjustments to agenda or attendees?
- Share with stakeholders and agree on a plan



# Improving *Your* Meetings

# Scope & Objectives

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

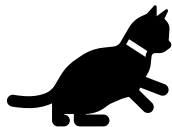
*“That depends a good deal on where you want to get to,” said the Cat.*

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

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

*“—so long as I get SOMEWHERE,” Alice added as an explanation.*

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

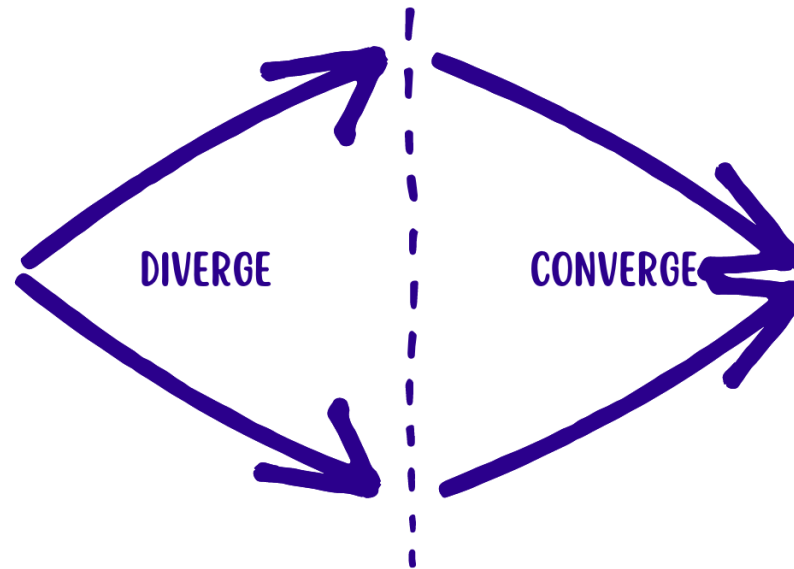


*—Alice’s Adventures in Wonderland*

# Before the Meeting – Scope & Objectives

- Setting Outcomes – Defining Success
  - Identify specific outcomes for the meeting (and/or each agenda item)
  - Ensure they are measurable
- Setting Scope
  - Manageable within the timeframe
  - Interests/impacts all attendees
  - Related to a single topic or theme

# Scope – Avoid Trying to Diverge & Converge



# Before the Meeting – Inviting Attendees

- Identify the *right* people
  - Who needs to attend
    - Have information to share
    - Need to make a decision or provide input to the decision
    - Need to hear the decision-making process first-hand
  - Who wants to be there, but isn't required
    - Why do they want to be included?

## Before the Meeting – Agendas

- Logistics (where and when)
- Topic and Objectives/Purpose (why)
- Attendees (who)
- Agenda items (what)

### Meeting Agenda

#### Topic: Project Schedule Review

Date & Time: April 8, 2023 @ 9.00am - 10.00am

Location: Boardroom A (or

<https://us02web.zoom.us/j/90210000000>)

Facilitator: Shandi Martinez

Minutes: Paul Warkins

Objectives/Purpose:

Review project schedule and identify adjustments that need to be made; obtain agreement for milestones

#### Attendees:

Shandi Martinez (Project Manager)

Carl Brohemier (Project Sponsor)

Paul Warkins

Susan Grimes

Bindi Walker

Surya Devi

Mei Yeung

#### Project Objectives Overview

9:00am - 9:20am | Presenter: Carl Brohemier

Project Sponsor to review project objectives and the business benefits of the work.

Objective: Ensure understanding of why we're undertaking the project before reviewing the schedule

Prepare: Review annual corporate KPIs ([link](#)) and project charter ([link](#))

#### Project Schedule Review

9:20am - 9:50am | Presenter: Shandi Martinez

Project Manager to provide a walkthrough of the project schedule with team and get feedback into milestone dates, activity sequencing, and potential gaps.

Objective: Confirm agreement on project milestones, confirm that activities are sequenced properly, identify any missing activities

Prepare: Review project charter ([link](#)) and Project Schedule ([link](#))

#### Close-out

9:50am - 10.00am | Presenter: Paul Warkins

Review action items and next steps

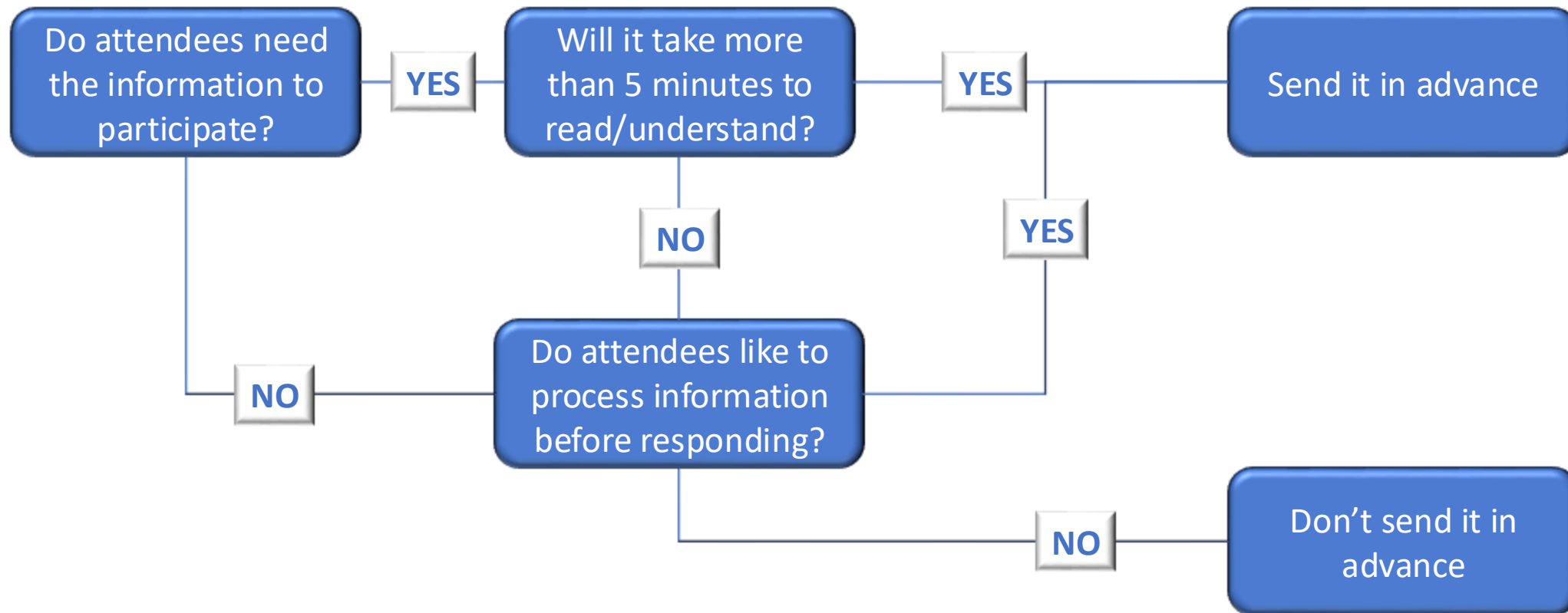
Objective: Confirm all action items and next steps are identified and agreed upon, including assigning responsibility and due dates

Prepare: n/a

WHO, WHAT, WHEN, WHERE, WHY



# Before the Meeting – Pre-Reading








# During – Setting Expectations

- Review the agenda together
- Agree how to manage out of scope items
- Agree on objective to finish on time
- Avoid shortcuts!

# During – Staying on Track

- Prepare
- Be disciplined
- Interject! It's your job, it's not rude!
  - “This sounds like an important discussion, but we need to cover the agenda items first. Can we schedule a separate meeting/circle back at the end?”
  - “I’m mindful of the time. Do we want to continue on this topic and cut item #3 or can we table this for now and schedule a follow-up meeting?”
  - This sounds like an important discussion, but I’m not sure if we all need to be a part of it. Can we continue with the agenda and schedule a separate meeting for you two?”

# Managing Different Meeting ‘Personalities’

The Multitasker		“Sorry, I was writing an email. Can you repeat that?”
The Time is a Construct		“Sorry I’m late. What are we talking about?” “I’m not sure if this was covered before I got here, but...” “I’m double-booked, so I need to leave. Send me an update on the discussion, and I’ll give you feedback later.”
The Overtalker		“Yeah, I’ll let you finish but I just wanted to add...”
The Usurper		“I know that’s what the agenda says, but this is important.”
The Tangent Taker		“This reminds me of a time when...”

## Remember!

- Only meet when you need to
- Be prepared
- Be clear
- Give and ask for feedback
- Practice, practice, practice





**What is one thing you can take away  
to help your team meet better?**