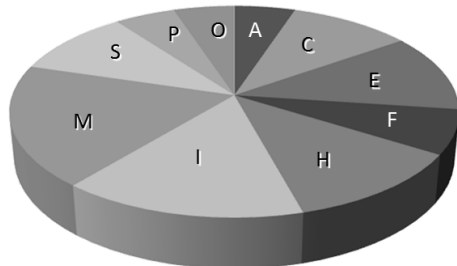
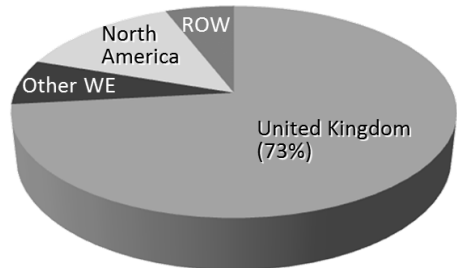


## Appendix 1

### Key findings from Meetings Survey

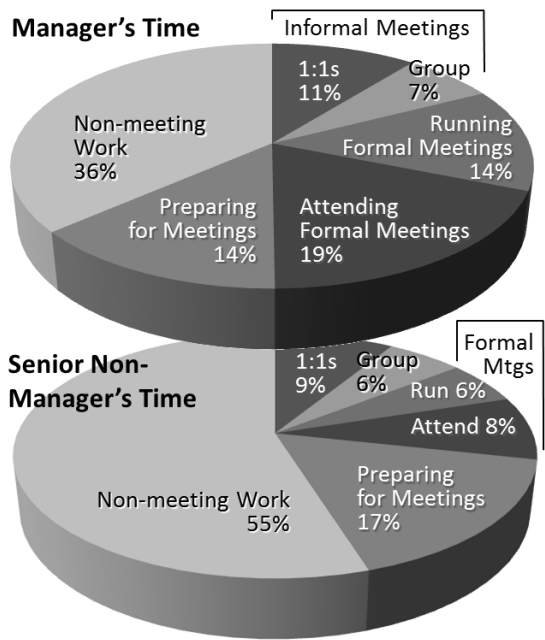
In the second quarter of 2011, we instigated a survey of 115 senior staff from a wide range of sectors and organisations. 101 respondents completed the survey (88%) from 59 unique organisations. 55 of the respondents held management or board level responsibility, and 46 were (predominantly) senior staff. The size, location and sector of the organisations surveyed are indicated in the pie charts on the right. While the results are predominantly UK based, there is sufficient data of non-UK respondents to indicate that the findings are likely to be largely consistent for non-UK based organisations and staff as well, and particularly relevant to those who are US based.



A.	Arts & Recreation	5%
C.	Charity Sector	10%
E.	Education & Public sector	12%
F.	Finance and Insurance	7%
H.	Healthcare sector	12%
I.	IT & Communications	15%
M.	Manufacturing	19%
S.	Professional Services	10%
P.	Process Industries	5%
O.	Other	5%

Reference Point  
**A**

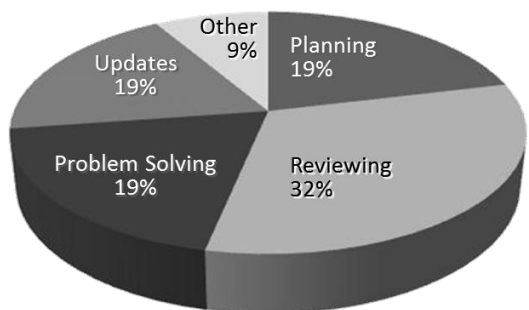
The diagram on the right illustrates how much time is taken up in meetings (formal and informal) or in preparing for meetings. Things to note here are that almost 50% of management time is spent in preparing for or attending (including running) formal meetings. While non-managers spend less than half the time that



managers do in formal meetings, they spend 20% more time in preparing for them. Ideally, progress reporting should be as close as possible to a natural outcome of our own meta-processes in planning and reviewing our own work, but the fact that almost one quarter of non-manager's non-meeting time is taken up in preparing for meetings, may indicate that there is an issue here.

Reference Point  
**B**

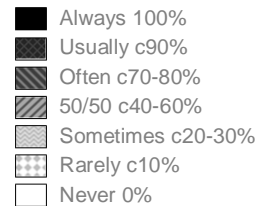
We asked respondents to analyse the last ten meetings for which they were present as an attendee (in order to increase the objectivity of the data). The diagram on the right shows the spread of purposes for these meetings.



Having identified a set of around ten specific meetings, we asked each respondent to evaluate the meetings in terms of five specific aspects:

- Quality of Purpose
- Quality of Process
- Quality of Preparation
- Cultural & Leadership Effects
- Quality of Outcomes

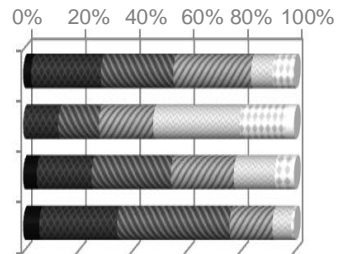
Each of these aspects was broken down into a number of specific questions, and respondents were asked to mark the proportion of their meetings that fulfilled the criteria in the question. The result of this for each aspect of the meetings is presented below, and each graph uses the key on the right.



### Quality of Purpose



- Did they have clearly stated objectives for the meetings?
- Would you say the objectives were well defined in terms of specific measureable outcomes?
- Was there a clear need for the meetings to take place at this time?
- Were the invitees to the meetings the best participants for achieving the objectives?



It appears that just over one third of meetings still take place without a clear objective, and where objectives are defined, they are often not specific. The consequence of this was summed up in a supplementary comment: *“Quite often the organiser has thought about what they want from a meeting but articulated it poorly, or not at all, and the meeting becomes about defining its purpose.”*

A separate comment, concerning the third question, was: *“Repetitive meetings on a monthly basis, weekly, whatever can be very dangerous. Same with set objectives. After several of these meetings people can become disinterested, attendance can drop, lack of attention often occurs.”*

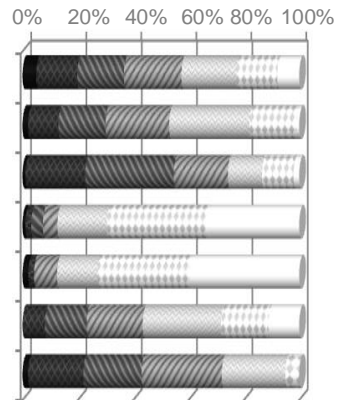
It transpires that 39% of meetings (presumably periodic or scheduled) take place when there is no real value that they can add at that point in time. This may be because of issues in driving progress (which we shall cover later).

The choice of invitees fared better than the other items in this section – correctly selected c. 75% of the time.

### Quality of Process



- Were there clear timed agendas for the meetings?
- Did the agendas reflect an effective and efficient process to achieve the objectives?
- Did the meetings stick to the agendas?
- Did the meetings agree a set of behavioural ground rules; and were these followed?
- Did the meetings make use of a 'Car Park'? (flipchart used to park off-topic issues)
- Did the meetings have access to best-practice and expert inputs where relevant?
- Did the meetings make full use of attendee's experience, abilities, insight and ideas?



Less than half the meetings surveyed had a clear timed agenda, or reflected an efficient process to deliver the meeting objectives, but in approximately 60% of meetings (which had an agenda) the agenda was followed. Only 20% of management meetings have groundrules and car-parks, and only c.10% of non-management meetings have them. The consequences of this become apparent in a later section of the survey.

To what extent did the meetings make effective use of the following tools:

Accurate and well-researched data on the situation?

Visual presentations? (e.g. PowerPoint)

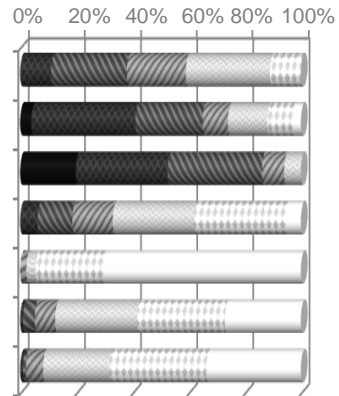
General debate & discussion within the group?

Brainstorming? (Following its rules)

Creativity tools, such as SCAMPER, reframing, or de Bono's methodologies?

Using things like post-its & wall templates, where everyone contributes simultaneously?

Problem solving tools such as cause & effect diagrams, process mapping, 5 whys etc.?



In terms of the approaches used within the process, the most prevalent of these are clearly visual presentations (64% of meetings), well-researched data (49% of meetings) and general discussion (80% of meetings), and this is consistent with a fairly traditional approach to meetings. There is also a reasonably high incidence of brainstorming (29% of management's meetings and 38% of non-management's).

Conversely, only 14% of meetings utilise problem solving tools. If we take as our premise that meetings should exist to close existing or potential gaps in our performance (see main text, page **Error! Bookmark not defined.**) then this may reflect either: a lack of recognition of 'gaps' in what is happening as problems to be solved; or a lack of awareness of the best approaches to systematically address those problems. Not all meetings have problems to solve, but most do if only we are willing to look for them and see them as such. In this regard, 14% seems a low proportion.

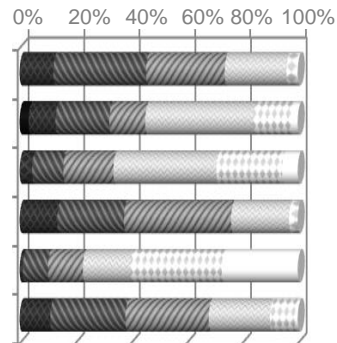
But the issue of recognising problems appears dwarfed by the issue of accessing people's creativity. Only 5% of management meetings, and 3% of non-management meetings use creativity

tools; 70% of organisations never use them. In a World where the West is no longer a competitive source for ‘routine’ labour, we need our people’s ideas and insights to sustain our future. And yet we appear to ignore (*or even eschew*) the very mechanisms that are most effective in inspiring those ideas and insights.

## Quality of Preparation



- Were info/explanations well thought through; designed to convey key messages efficiently?
- Where pre-reading would have been useful, was that pre-reading available beforehand?
- ... and had people made use of pre-reading ... and did the meetings avoid repeating it?
- Where actions were required to be completed for the meetings, had these been done?
- Did the meetings make use of external work on current innovations and best practice?
- Were all scheduled items completed as intended with the info at hand in the meeting?



Preparation is one of the biggest issues in the quality and efficacy of meetings. Managers are always in a rush (two thirds of their time is in meetings or in preparing for them), they lack the time to prepare properly, as a result the meetings are inefficient, and so we have more meetings to make up the deficit.

Almost half of all presentations to meetings have not been designed to make best use of people’s time at the meeting; as one comment put it: *“Internal ‘Experts’ are often blinded by their own knowledge and egos, and sometimes have an inability to summarise and present concise information.”* And as another phrased it: *“Many people like to tell ‘war stories’ which get drawn out (long winded) and often causes loss of audience. Same point with over extended explanations.”*

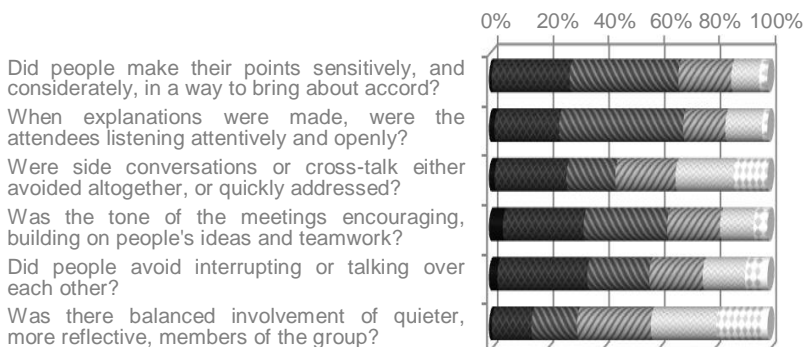
Useful, relevant, pre-reading is more usually (56%) not available before the meeting and, where it is available, two-thirds of the

time it is not efficiently utilised. This appears endemic and to have become the accepted norm in many situations – an illustration of ‘tragedy of the commons’ reported in the main text on page **Error! Bookmark not defined.**: *“People seem to come to meetings unprepared more often than not, so there is unnecessary repetition. Also if the attendees vary due to absence or perceived higher priorities, much time is spent getting the new folks in the picture.”*

Furthermore, almost half (45%) of actions required for the meeting are not completed. As one respondent put it: *“Completion of actions is a problem in that it’s usually obvious that people either haven’t done them or have done them hurriedly at the last minute. It also seems that actions are not always recorded accurately, and people don’t clarify or challenge the inaccuracies until the next meeting.”* The consequence of this is picked up later, but it is interesting to note the similarity of composition for this bar on the chart, and the bar for: Were all scheduled items completed as intended with the info at hand in the meeting?

In respect of accessing information on innovations and best practice in the meeting, over 60% of organisations do this only rarely or not at all.

## Cultural and Leadership Effects



On their own, scores of almost 70% for ‘points made sensitively’, ‘attentive listening’ and ‘tone open and encouraging’ seem very reasonable (and probably a great improvement on what it has been in the past). The issue, however, is what happens for the other 30%+ of the time that suppresses the involvement of quieter and more reflective member of the group – the majority (57%) of management meetings do not have a balanced involvement from those attending them.

It is relatively easy for the more ‘driven’ managers to be calm, gracious and involving when things are going their way, but what happens on the occasions when they don’t. The CMI (Chartered Management Institute) “Survey into the Quality of Working Life” 2007 concluded that the predominant management styles were still bureaucratic, reactive and authoritarian. This is perhaps reflected in the following comment raised in the survey: *“The culture at [name removed] is he who shouts loudest and longest gets his point across. No understanding of the quiet person or reflectors etc..... Get in shout about it, tell people what to do and get out again!”*

Not all organisations are quite that bad, and yet the low figure for the involvement of people shows that they are not that good either. It is often the people who have got to senior positions by listening rather than speaking that have more insight and wisdom to bring to situations, and it is therefore somewhat ironic that it is in heated (and thereby presumably important) discussions that we are least likely to solicit their opinions.

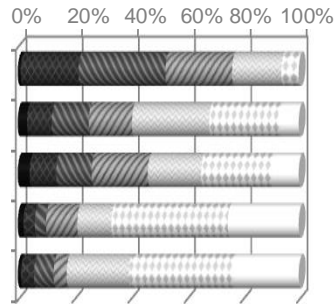
In large part, this comes down to the leadership and facilitation of the meeting, and there does appear to be an issue in this respect.



The chart below shows responses to questions exploring the management of the meeting.



- Did the way the meetings were run reinforce values & behaviours a leader should promote?
- Was there sufficient/appropriate follow-up on those who failed to complete prep'ns/actions?
- Are you confident that poor behaviours will have been appropriately addressed off-line?
- Did the meetings conclude with a review of the performance of the meeting?
- Is there evidence that such reviews are used effectively to improve future meetings?



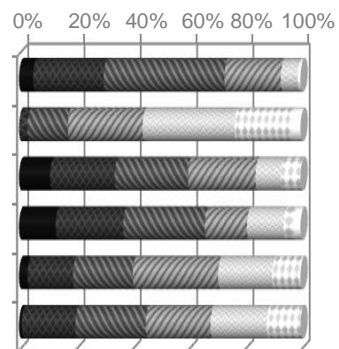
What is notable on this chart, in the context of earlier data regarding the level of poor preparation for meetings, are the low scores for 'follow-up' and 'confidence that poor behaviours will have been addressed off-line' (both less than 40%). The inference is that counter-productive (at least in terms of the organisation as a whole) behaviours go largely unrecognised and unchecked, and so continue as part of most people's every-day experience.

This has significant implications for the effectiveness of meetings (as we have seen already and will see again later) but the reason that it is not systematically addressed is evidenced in the last two bars of the chart. 67% of organisations rarely or never review their meetings and, even where meetings are reviewed, it is highly unlikely that the review will be revisited to improve subsequent meetings (22%).

### Quality of Outcomes



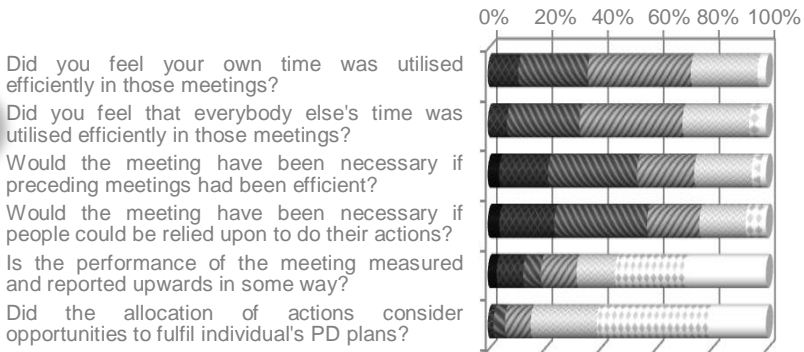
- Did the meetings develop a practical plan of action to move forward?
- Where appropriate, did the plan of action contain innovative elements within it?
- Did those actions clearly specify what was to be achieved, by whom and by when?
- Were the key conclusions/actions arising from the meeting documented and circulated?
- Did the meetings result in energy, commitment, passion to move forward & deliver the actions?
- Were you confident (based on experience) that actions will be completed to schedule agreed?





People’s responses to the questions on quality of outcomes indicate that, one way or another, meetings do result in some sort of plan of action in 71% of cases, and that the actions have defined owners and timescales in 66% of cases. While there is clearly room for improvement here, it does appear (anecdotally) to represent an improvement in basic disciplines over the past decade or so. It is also clear that some creative ‘outside of the box’ thinking is finding its way into those actions (37% of those meetings that are appropriate to it).

What is of more concern is the low levels of commitment generated in the people that are required to take those actions forward (54% of meetings), and the resulting low level of confidence that the actions will be delivered (55% of meetings). The consequences of this can be seen, in part, in the chart below:



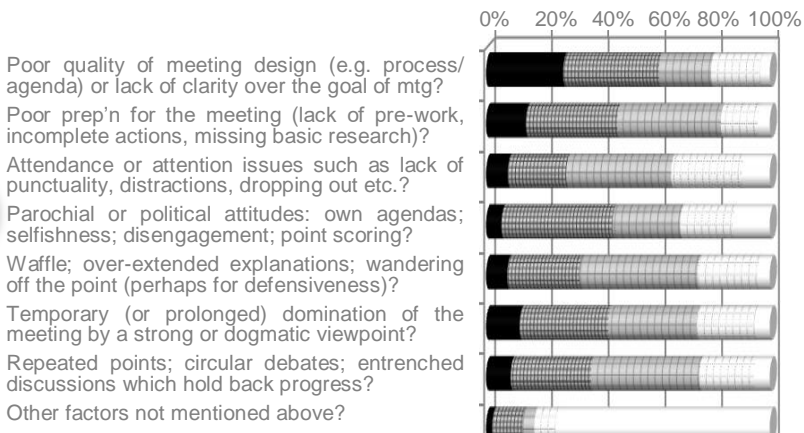
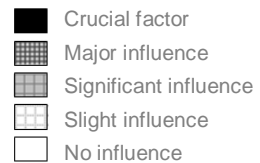
The most interesting aspect of this chart is the two highest scoring bars in the middle, and the fact that they are not almost entirely black or very dark grey. Basically, 40% of our meetings arise as a result of a previous meeting being deficient in some way (lack of conclusion; lack of actions; lack of commitment – please see the

chart on the preceding page), and 39% of our meetings arise basically because we cannot rely on people to do what they promised to do when they promised to do it!

Even if there is a lot of overlap between these two figures, the idea that virtually half of all meetings are a result of compensating for poor disciplines in other meetings (or in preparing for them) is somewhat discouraging. Particularly in an environment where busy (even over-busy) managers spend two thirds of their time associated with meetings.

Furthermore, if we look at the two uppermost bars on the chart, we can see that even within meetings time is not utilised efficiently. 47% of meetings were felt not to use the respondent's time efficiently and 49% of meetings were felt not to use other participant's time efficiently. It may be an extreme extrapolation, but one interpretation of these data would imply that in an ideal situation 75% of meeting time could be avoided since we have twice as many meetings as we should have, and they are twice as long as they need be for what they achieve.

In any event, there is clearly a number of problems with the effectiveness and efficiency of meetings, and we asked respondents what they saw as the biggest influences within that. Their responses are presented in the chart below:



Apart from the first item, which was the most prominent in the responses, all of the other factors are behavioural, and this reflects strongly back on the preceding section of the survey: 'Cultural and Leadership Effects' and in particular, issues raised concerning the low level of follow-up on such behaviours.

### Spread of opinion

It would be tempting to hope that within the survey, there may be one organisation that consistently scored highly across all aspects of meetings, and that that organisation is representative of our own. Sadly, with only two exceptions, everybody who scored certain aspects as 'always' or 'usually' scored others as 'rarely' or 'never', and those exceptions both happen to work for organisations with over three other respondents, none of whom shared their views. In this arena, there is no perfect organisation – but therefore, on the positive side, all organisations have a lot to gain from getting this right. And this seems to be true irrespective of the size of the organisation you work in, or in which World area you operate. Averaged across the key questions that have been emphasised in this report, the effect of geography is within +/- a quarter of one grade point from the overall average and the effect of organisation size is even less at +/- 0.07 grade points.

Apart from the data on current meetings, there were two other areas that the survey examined. These were undertaken to support key arguments used in the body of this book in respect of effective adoption of web-based meetings:

- The first of these concerns the efficacy of multi-channel meetings over single-channel meetings, and the key factors against the increased utilisation of these
- The second concerns the key factors in building effective relationships and the role of 'physical proximity' or 'sight' within that.

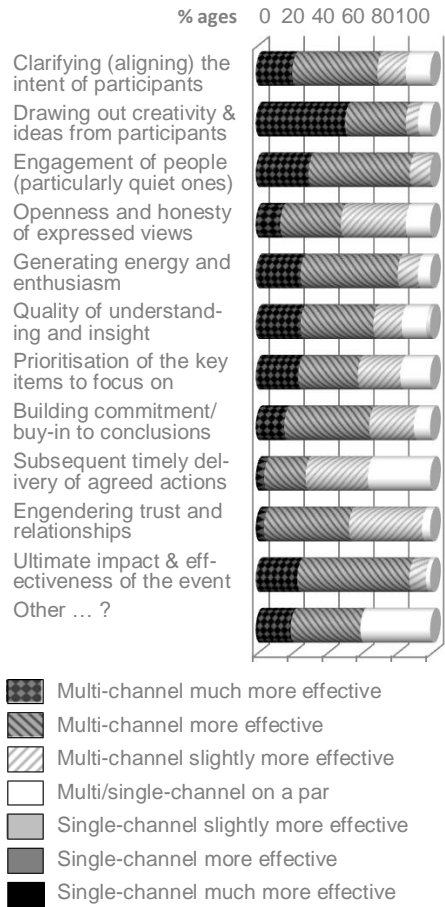
These two things are now taken in turn.

## The impact and the difficulties of multi-channel meetings



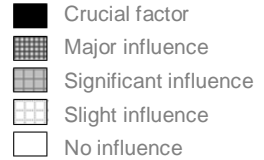
This part of the survey was only asked of people who had direct experience of a particular type of multi-channel workshop that we run for our clients. Although others may have had experience of such workshops, we have no idea what they may have contained or whether they were effectively facilitated, and so we wanted a ‘controlled population’ where knew exactly what they had been exposed to, and could be clear about what we were describing. 43 people responded to this section of the survey; 35 in management roles, and 8 in senior non-management roles.

We began by asking them about their experience of multi-channel meetings and their effectiveness in comparison to their normal meetings on a number of criteria. The results can be seen in the chart above right. From this can be seen that overall, an average of 67% of participants found multi-channel meetings either more, or much more, effective across all of the criteria listed, and the rest saw the as at least on par or slightly more effective in those areas. Clearly there are some areas which score more strongly than others: drawing out creativity & ideas; engaging people; and

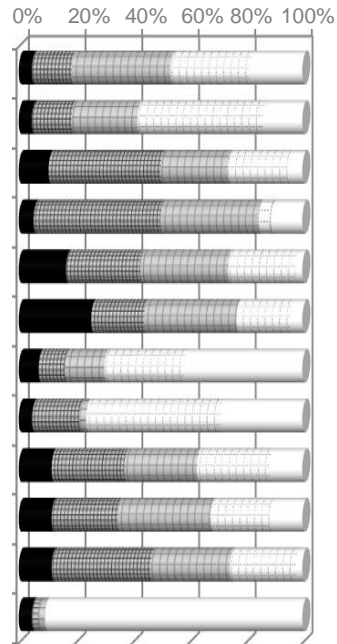


the ultimate impact and effectiveness of the event, but there was no area of 'effectiveness' on which they were in any way inferior.

The problem comes in how practical they may be in a general situation. In theory, all of the tools people experienced in these workshops could be adapted and imported into a normal meeting, but in practice people see a number of barriers to doing that, as illustrated by the diagram below:



- Practical limitations such as lack of facilities or the available space in the meeting room?
- Use of shared meeting room, where such tools need to be taken down, put up again, & stored
- Perceived time constraints in preparing for the meeting
- Perceived time constraints in running the meeting
- Lack of awareness of the tools and their relevance to the meeting
- Lack of skills and confidence in introducing them or using them effectively
- Past bad experiences with the tools, where they just did not work effectively
- Past experiences where the tools were subverted (hijacked) by influential people
- Cultural influences such as ingrained cynicism about 'new' or different approaches
- Reluctance from senior people (who may owe current position to their skill in old meetings)
- Optimism that the objective and buy-in can be achieved perfectly well without them
- Other ...

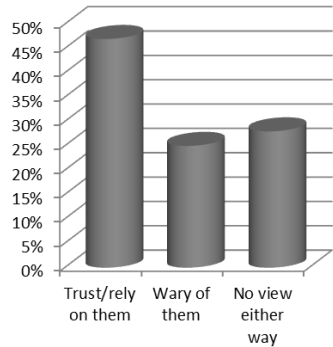


The interesting thing here is just how many of these issues can be addressed by good use of the web-based meeting environment, by the arguments structured around that, and by appropriate training.

## Key factors in building effective relationships

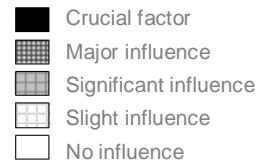
The survey asked respondents to reflect on people who they had ‘newly met’ over the last few months, and what proportions of them fell into the following categories:

- At present, I believe I understand them can trust them, & could rely on them?
- At present, I would be wary of trusting them and/or relying on them?
- I haven't developed a view yet, or I believe they are neutral between the above two descriptions?

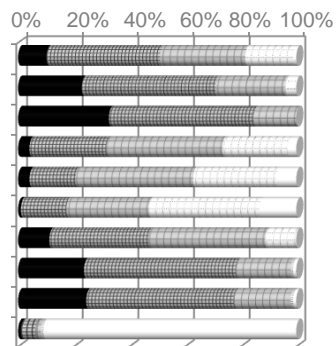


The overall results are shown in the chart above right.

We then asked people to consider what they thought were the biggest factors in building positively on these relationships, and the results are shown in the chart below.



- Arriving at conclusions where we agree
- Being listened to and understood
- Delivering what was promised/agreed
- Responding to face and body language
- Being physically located in the same space
- Spending time together socially
- Being treated fairly in arriving at a decision
- Developing a shared vision of achievement
- Building successful outcomes together
- Other factors ... (Please specify)

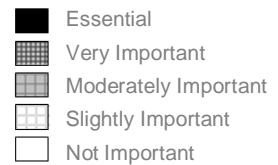


The interesting thing about this chart is what criteria score lowest on it: Responding to face and body language; being physically located in the same space; spending time together socially - the three factors that are uppermost in people’s minds when they

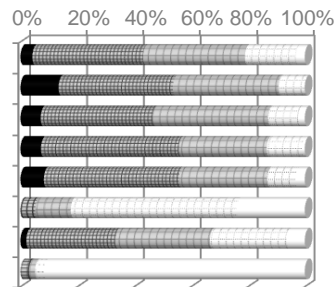


think about relationships and the problems with web-based meetings. Conversely, the most important things are all factors which are the product or process of a well-designed and facilitated meeting. As we discovered earlier, these are better achieved in a multi-channel meeting and thereby, paradoxically, easier to deliver through a well-designed web-based meeting.

Building on this theme, we asked respondents why good relationships with their colleagues were important to them; we asked what benefits they saw from improving relationships:



- Easier to state my case and get it listened to
- Better understand/appreciate their case
- Tolerance of any misunderstandings that arise
- Greater influence in ensuring right outcomes
- More comfortable in raising difficult issues
- Enlarge my social circle: friends/acquaintances
- Approach people for support outside meetings
- Other advantages ...



The interesting thing about this list is that people are not seeking relationships for the sake of relationships ('enlarge my social circle' scores by far the lowest on the chart) but to be more effective in the meeting itself, and beyond it. In single-channel meetings, these benefits can make a lot of difference to your influence and power. But they hold less sway in multi-channel meetings, where the outcome is more influenced by merit.

The point here is that there is some mythology about relationships and visuals that is not borne out in practice. But there are also aspects of the visual that are not entirely reflected in the analysis above, that was neatly captured by the following comment within the survey: *"I would have answered this*

*differently prior to lengthy experience of working with remote teams. It is true that this differs from one culture to another. For example, Brazilians are warm people who need more personal interaction than say American colleagues. Always use webcam when talking to them.”*

Differences between national cultures were also reflected in the following comment: *“Meetings ran best where adequate consideration was given to cultural context during preparation. For example, when [X] are running a meeting with a group of primarily Japanese attendees and are perceived to have failed to 'respect' the relative status/seniority of key players the objective of the meeting will not be achieved. (And, by the way, [X] won't realise it as the Japanese won't voice disagreement).”*

Perhaps it would be best to leave the final statement on all of this to another comment made in the survey:

*“I think there is a cultural gap in terms of the traditional thinking of a meeting as a set and formal process with an agenda, a discussion and a recorded set of notes, actions and key points and people in my view often don't even think to use tools during meetings. On the occasions when someone does (which aren't very often) it can have a significant effect on the quality of the discussion and/or outcome.”*

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