Appendix 3

Survey guidance for reviewing your organisation

Parkinson's Law *("Work expands so as to fill the time available for its completion")* has a number of corollaries. One of these is that if you do not measure benefit in time and costs, and plan for how you will harvest them, they will get consumed and subsumed to the point that you might believe they never existed in the first place. Many improvement initiatives failed to realise their potential because the benefits they generated were never managed and harvested, and as a result they 'evaporated' often into inefficiency elsewhere.

Managing benefits requires that you have a very clear idea on exactly what they are. In the case of meetings efficiency, and the dearth of metrics concerning this in most organisations, there is very little hard data on which to base this. Hence the need for survey; to create a baseline against which to measure and manage benefits, and to ensure that they are realised.

But the survey also needs to guide us in deciding where the harvests will be greatest, and where we need to sow the initial seeds of investment, and this will vary from organisation to organisation, and from situation to situation.

On the companion website[1], we have a number of resources which we hope will help you to conduct an effective survey, and a number of links to resources which can help you to automate the

[1] www.meetingbydesign.org

process. But, however you undertake your survey, there are a number of things which you might consider before you start.

Who you survey

The lack of good metrics on meeting effectiveness tends to lead us all into a somewhat optimistic, and largely unchallenged, perspective on what has resulted from the meetings that we personally have designed and lead. And even where we know they have not gone as well as they might, we tend to put this down to a number of totally valid excuses and see them as the exception to the norm. Therefore surveying the leaders of meetings is not usually the most objective source of data on what emerges.

However, those same people who are leaders in some meetings are usually participants in others, and from this perspective they have the time and objectivity to come to a more realistic opinion on the effect of that meeting on what it was *(or might have been)* trying to do. And every meeting that is lead is also attended.

We therefore recommend you survey people as attendees of meetings rather than as leaders of them, and make that specific.

In terms of which actual groups of attendees you survey, you might like to think about the following:

- Do you survey the whole organisation or just the portion of it where you are likely to find the best opportunity for benefits *(such as the management and supervisory levels)*? And do you survey all of that population or just a sample?
- Will surveying people who you may be unlikely to address in the short term risk raising expectations that you will be unable to fulfil?

- Will you know who respondents are, or will they be anonymous? This is a more important question if the survey is being administered internally, and people may be concerned about what their boss *(or even their boss's boss)* might think about their answers.
- Will the people who you survey feel confident in the organisation's desire to use the data to improve their working lives and help them to achieve more with less stress, or will they fear that the data may be used to raise the pressure and/or make savings in headcount?

The points made above may not necessarily change who you survey, but it may help you to think through what additional information you provide when you do survey them, and the context in which it happens.

What you survey

The data that you are looking for out of your survey needs to do several things. It needs to:

- Confirm to you whether you need to do something within your own organisation
- Clarify exactly what that is, and the benefits that will ensue
- Determine any areas of focus within that in terms of particular populations and particular needs
- Provide an objective baseline against which you can measure your progress

We would therefore recommend that your survey covers the following areas:

- Time spent in meetings of various types, both physical and virtual *(video, audio or web-conference)*
- Time spent in travelling to meetings, the associated costs involved, and any implications for workload or effectiveness
- Quality of outcomes of the physical meetings they attend in terms of effectiveness, commitment, deadline conformance, impact on culture and development
- Quality of approach in the physical meetings they attend in terms of preparation, participation, behaviours, culture
- Quality of current virtual *(web-based)* meetings in comparison to this, and the underlying factors (still from the perspective of their attendance)
- The benefits of addressing issues raised in the previous three bullets, and how they would utilise these benefits
- The extent to which the available functionality of web-based meetings is understood and utilised
- The implications of forcing 50% of their current travel-to meetings into web-based meetings at the current levels of performance
- The benefits of moving 50% of their current travel-to meetings into web-based meetings, if web-based meetings could be as good or better than physical meetings

This is clearly a lot of work, but there are a lot of benefits to be gained, and only a small proportion of these concern travel cost savings. All the data which you do not gather at the outset is data that you cannot manage in terms of ensuring the benefits. But this leads us on to 'How you survey'.

How you survey

Although there is a lot of data to be collected, it may be possible to using a 'ranging' survey with a small willing group of volunteers to begin to identify the most productive areas of focus for your organisation, and then broaden the survey population, but with more focused content which is targeted at the areas *(benefits)* which you know will be those you most want to understand and manage.

Also you have a choice about whether you want to sample survey, and whether you want to target different questions at different samples. And you have a choice about how you survey; whether it is by physical interview, or paper questionnaire, or on-line; and whether it is general or focused on specific meetings.

If you are working with a third-party to do your survey, then they will have their own models for doing the survey, and some of the decisions will need to be made on the basis of economics, but if you are conducting the survey yourself internally then we would suggest the following step by step approach:

- Lay out your survey questions comprehensively, but think of them initially as areas for discussion
- Interview a few people within your organisation using this model and, through discussion, refine what it is you want to ask and understand
- Develop a draft questionnaire based on the above and pilot it with around 10-15 trusted people who you know will give you good feedback and honest answers
- Analyse their responses and go back to them with any supplementary questions which emerge

- Adjust, and possibly refocus, your questionnaire in the light of this, and determine a strategy of who to send it to, and how to prepare them to give the most honest responses
- Send out the questionnaire, either in a paper or an electronic version, and then analyse the responses.

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