Jana Kemp Stamped Webinar Transcription

[00:00:00.21] JANA KEMP: This is Jana and I was thinking yesterday after Steve and I met to work through how to best use the system that in order to prepare for this one hour presentation, how many hours or minutes do you think have gone into preparing for the one hour webinar? And if you have a guess, go ahead and type it into the chat box and then we'll kick off with introductions. So for a one hour webinar, how much time has been invested to prepare for today? Any estimates? Steve, you might even have an estimate.

[00:00:35.11] STEVE VILLACHICA: I know we've met for about an hour or so but there's also the time that went into your slides and--

[00:00:44.25] JANA KEMP: I like Don's answer, the years of experience to get us to today. Thank you. I hadn't even counted that. So I'm going to steal that answer and use that in the future. Years of experience plus the hands-on hours to be ready for today.

[00:00:58.41] So it definitely was a series of days. I would sum total it to about four hours between the phone calls and the content preparation, the marketing, announcement and the paperwork that I needed to sign to participate with BSU. And the reason I thought that was important is that sometimes the meetings that I'm facilitating actually do take more time to plan and organize than the time in a classroom or in a meeting room or, in today's case, in the one hour webinar. So with that, I'll pass the mic back to Steve and we'll get ready to start our content.

[00:01:37.65] STEVE VILLACHICA: We've all been to meetings. Some are good, so many aren't. So how do OPWL practitioners, including students in our project-based courses and graduates, make their team and their clients meetings more productive?

[00:01:54.29] Luckily, I met Jana Kemp at last month's meeting of the Treasure Valley Chapter of ATD. We got to talking about meeting challenges and how to overcome them, and Jana agreed to share proven strategies and tactics for more productive meetings. As with all of the talking shop webinars, we envision more of a dialogue than a one way presentation. That means Jana will answer your questions and it also means that Jana will be asking you questions. When she does, please feel free to jump in with your response. Jana, we're delighted to have you with us today.

[00:02:29.37] JANA KEMP: Thanks, Steve. I'm delighted to be here and I'm appreciative of an opportunity to see what new questions might come to the table about making meetings more productive. As you saw in the announcement to the webinar, our purposes today include the following, to look at the tactic of agenda building, how do we do it and when is it important to build agendas? We'll also look at setting the rate length of a meeting. I'm sure you've all been in meetings that were longer than you expected and maybe less productive despite the added length to the meetings. So I'll share the secret formula of setting affective meeting lengths for accomplishment.

[00:03:13.85] We'll also talk, as Steve mentioned, about some of your meeting pain points. You're partway through the semester or some of you just starting into a semester if you're a
future listener, and the key is to figure out, how can we avoid the pain by using structure and systems that still allow us to enjoy the interactions that we're having with each other? So I do look forward to hearing what your questions are along the way.

[00:03:42.47] And then we will wrap up with, what are the note-taking strategies and decision log tactics that we can create that effectively allow us to show what we've done, proof of performance kind of records for your portfolios, and to also make sure that work gets done in between the meetings. So let's dive in.

[00:04:05.64] What in the world does it mean to meet, M-E-E-T, to meet anyway? Now, I wrote a book in the 1990s that came out from McGraw-Hill in English and then it was translated into Italian. And as I was doing research for that book what I uncovered is that the word meet was originally used in old English to refer to a fox hunt, ergo the fox on the screen. So when you think about a fox hunt, what's the purpose of a fox hunt? Anybody can jump in. The purpose of a fox hunt is to what?

[00:04:44.95] STEVE VILLACHICA: Catch a fox?

[00:04:45.97] JANA KEMP: Well, that's one purpose. Is that the only purpose of a fox hunt?

[00:04:51.33] STEVE VILLACHICA: Maybe kill it or maybe just--

[00:04:54.60] JANA KEMP: Catch and release, I suppose.

[00:04:57.45] STEVE VILLACHICA: Catch and release.

[00:05:30.54] So, thanks, Devin, for jumping in as well. So coming together for a clear purpose is what in a 21st century I mean when we're talking about a meeting. And those meetings can be in a variety of environments, which we'll talk about along the way, too.

[00:05:46.77] So another question for interaction. Why does having a meeting matter? Why do we need to hold them? Why do we want them to matter even if we're suffering those pain points of it's not working well. So why do meetings matter?

[00:06:02.64] And the webinar counts as a form of a meeting today even though we're not face to face. So to gain agreement, share and distribute information. Absolutely. And on the sharing of information, there are many client organizations that I work with that hold face to face meetings or all employee meetings where people have to log in or get to an auditorium so that the consistency of the message is what remains intact rather than piecemeal, he said she said, the
manager said, the CEO said. And so sometimes the concurrent synchronous face to face meeting is a way to manage that communication effectively.

[00:06:43.83] Getting agreement often happens most effectively when we aren't lifetime. We may not be face to face, but at least if we are lifetime synchronously interacting, then we have the opportunity to address questions and concerns. So, yes, the more efficient sharing of information and being able to make decisions.

[00:07:03.64] STEVE VILLACHICA: One of the things that struck me as a consultant is how different organizations look at meeting times.

[00:07:11.34] JANA KEMP: Yes.

[00:07:11.65] STEVE VILLACHICA: We had some organizations and their culture looked at meetings as a place where we're going to be very structured, we're going to look at reviewing and approving things, making decisions. And there were other organizations where meetings were actually workplaces that people could actually carve out and get something done. And even those were very different purposes for a meeting, both of those organizations used the same term to mean very different things.

[00:07:42.87] JANA KEMP: And that's a great segue into knowing what the purpose of the meeting is. So why are we getting together? Which is what Steve was just talking about. Is it to accomplish work, is it to make decisions, is it to share information, is it to see where we are with status updates and work progress assessments?

[00:08:03.57] Without understanding why we have asked everyone to come together, it's very difficult to know how to build the agenda. So when you think about your team meetings, why is the team coming together at any given moment? Is it to accomplish work, is it to share information gained from the client, is it to move the work forward with clear decisions, that once we make those decisions we're now in development and it'll be difficult to go back and we need to log those decisions? So recognizing that the purpose question is why are we getting together, to then identify what topics and discussions do we need to address.

[00:08:44.43] We'll talk a little bit more about outcomes on the next slide because we also need to know if decisions need to be made and that decisions will take more time than discussion might take because decisions come only after discussion has occurred. So it's an iterative build. Share information, have discussion, get work accomplished, then make a decision.

[00:09:08.75] So why are we getting together is followed by the outcome of, well, how do we know that we accomplished it? What measures can we use to identify that we can cross off on the checklist or on the purposes of the meeting that, yes, we did it? So the outcome is back to measures. What is it that needs to be achieved?

[00:09:31.42] Now, I would caution you in saying, well, we need a yes decision. Well, maybe sometimes you do. Because if the budget is $10,000 and the client needs to know that there's a $10,000 decision point, then you need a yes to continue to do work. In other cases, though, it's
that we need a clear yes or no decision, and whatever the decision is, we have clarity about how to move forward. So the caution again I provide to groups is, is it about a certain decision or is it simply about getting a decision?

[00:10:05.70] And then one of the ways to measure is to ask yourselves three questions about what do you want people to know. In other words, as we share information, as we have discussions, what should each meeting participant be able to know as a result of being in that meeting room? If they're not learning something new, why did they come to the meeting?

[00:10:29.83] Well, maybe it's because of the second question. What should the person or each person at the meeting discussion be able to do as a result of being there? Now, that ties back to decisions. Once we make a decision, we then should be able to recognize what work components come next. Are there new assignments to be made? Are there new action items to pursue? And if so, who is responsible for that? So what are we able to do individually as well as a team as a result of that meeting?

[00:11:05.89] And then the third piece is tied to that social element that Jon referred to back to the fox hunt. How do we want people to feel as a result of being at the meeting? Now, some of you, especially since I'm sitting in an engineering building at Boise State University would say, but I don't want to talk about the emotions of it. Can't we just stay on task and measure the knowledge and the ability to do things?

[00:11:31.40] And while I acknowledge that frustration, I also would caution here to say, but we all have feelings. And frustration is a feeling. Excitement to get the work done or commitment to get the work done also has a foundation in our feelings and emotions. So when we are planning the meeting, if we are not thinking through, do I need to get people from negativity to neutrality or from neutrality to commitment, then we typically are ending the meeting without people willingly committing to the follow through actions that we need to have in between times.

[00:12:09.51] So let me pause there. Are there any questions about purpose, outcomes, why in the purpose statements are we getting together? Which from today's agenda would be those objectives that I shared at the beginning. That's why we're getting together. The outcomes for today's webinar that I would hope are that you are able to use a new structure for agendas, use the template that we'll look at today, and that you will put into use-- so ability to do things-- the minute-taking or decision log process more effectively than now. So what questions do you have at this point?

[00:12:49.40] STEVE VILLACHICA: While people are thinking, the question that pops in my mind is, what are the major differences between the meetings that a project team will have among themselves and the meetings that they'll have with clients?

[00:13:05.60] JANA KEMP: That's a great question. As we-- you've probably discovered already, the internal team meetings are sometimes less formal, sometimes more vocal in the way that we debate with each other about what part of the project really needs to be done and when and who wants to do it. And with a client we're a little more guarded, put on our professionalism and have clear talking points so that we can provide information-- back to our purposes-- provide
information to the client, as well as engage the client in discussion about what the product
you're looking for, what goals they're trying to achieve along the way, and what are their
expectations of the finished product that you provide for them. So the formality changes, the
time limits are usually more strict when you're in front of the client.

[00:14:01.76] My encouragement today is that your internal team meetings also take on your
structure so that you're reducing your frustration levels and increasing your productivity levels.
So we know who we are. We're teams working to produce OPWL projects, we are working
internally as well as extremely with clients to do that, and we know that our outcome, by the end
of the semester, is that we have a completed deliverable for the client who then says, yes, this
meets our expectations and we can implement it internally.

[00:14:36.62] So along the way, the structure, then, the structure for the agenda is really this
template. I've given you all of the working headlines, if you will, of what goes into an effective
meeting agenda. So let's start at the very top. Let's start at the place where the first bullet says
Day and Date, right under the headline meeting agenda. So Day and Date.

[00:15:03.03] Most people say, well, why can't we just put the date of the meeting? Why do we
have to put the day in? And, Jana, what about all those times when the day and the date don't
match up and then there's confusion? Well, of course we want the day and the date to match up,
but the reason we do both is this. Most people think in terms of days of the week. For instance,
quiz question time. What day of the week is October 13th, 2017?

[00:15:30.45] Do you have a prize, Steve, for whoever types in the answer first? And I will tell
you, since I'm sitting here in person with Steve, he looked off to the side to visualize a calendar
to figure out what day of the week is October 13th. Any takers? Who's in? And, yes, both of you
are correct. It's Friday. A week from tomorrow. Friday, October 13th.

[00:15:54.53] But you see how long it took us to get to Friday. Most of us think in terms of days
of the week. So if you're trying to get a client to commit to a meeting, say, Friday, October 13th,
is when we would like to schedule our next meeting. Because right away they know, oh, every
Friday morning we have an operations meeting and then at 1:00 in the afternoon we have a week
in review summary so Fridays are completely out for us.

[00:16:20.60] Whereas if we had just said, October 13th, you might have got people saying,
yeah, I think we could probably make that work. But it's Friday and they're already booked. And
that is true of every day of the week. So we want the day and the date clearly stated on our call to
the meeting which is our meeting agenda.

[00:16:38.86] The next line then is about time, start time and end time. And over the last 10
years I've seen the end time on more agendas because even the call to this meeting in the form of
the webinar clearly stated we were starting at noon mountain time and ending at 1:00 mountain
time. So as the use of technology to schedule meetings increases, those end times are there.
However, as an internal team meeting, my guess is you're most often saying, hey, let's get
together at 7:00 PM at such and such a location and then not putting an end time on it.
So work to include that end time and here's why. This is a big football campus as well as sports campus, and when you think about what happens in the middle of a game or a sporting event or the intermission of a performing event, there's regrouping activities and there are breaks and coaching things that happen. The same thing is true in the middle of a meeting. Oh, my goodness, have we gotten through all of our agenda items? There's that time check of, oh, wow, we're accomplishing more than we thought or oh, we've got to get people to stop talking and focus on the task at hand.

That end time provides that way to check where you are in the middle of the process of the meeting itself. So a clear start time and a clear end time. You'll notice that I said mountain time. Idaho is one of the few states that has multiple time zones. So in your workplace, in your team environments for your course, get in the habit of adding the time zone that you're in so that it's clear.

One thing about technology is that in most cases it will enter the time zone in which the person is currently using their technology, which then may not convert for people who are in other time zones. So I've worked with clients where that's actually been a dilemma. So start time and stop time so we can get there on time and end on time.

The location almost goes without saying. Today it's online via the webinar. Be clear with your location if directions are needed or provide a link to a map. Also, you might add a contact person in the event that it's difficult to find that location.

So we talked about purpose and outcome. Purpose is, why are we getting together? What are the things that we need to accomplish during the meeting? Outcome, the measure. How will we know that we've accomplished it?

Again, the easy three, if you will. What do I want people to know-- as I point to my brain-- what do I want people to know? What do I want people to be able to do-- as I look at my hands-- the ability to get work done. And what do I want people to be able to feel? What are those emotional outcomes? Neutrality, commitment, excitement, willingness? All of that is important to any work accomplishment.

So the outcome statements are really important when you're the meeting leader. You may not actually post them on the agenda that you send out. The purpose statements, though, you will want to include on the agenda that you send out.

So now that we have all that logistics information in place, let's talk about the agenda items themselves. These are the columns that people most typically think of when they think of an agenda. So what time will each of the agenda items-- that second column-- start? So sometimes I have listed a time that's only three minutes ahead of the previous.

So if we start the meeting at 8 AM and we need to do introductions, let's say we're on a conference call and we're doing introductions and I know that there will only be four of us on the line, I can say, all right, we're doing introductions, that should only take us three minutes. As the meeting leader I can state the purpose, and now at 8:03 AM we'll be ready for our first
agenda item which may be information sharing, may be discussion, may be status updates on where we are in the project. So think in terms of how much time each item will need.

[00:21:01.67] And the third column, who will be the topic leader? Are each one of you as team members taking turns as topic leaders? Is there a section on the agenda where you need the client to be the topic leader and to present information to you as a team?

[00:21:19.00] The more names-- Steve, Jana, Jon, Devin and Brig-- is that? OK. I want to make sure I say that right. The more names we actually include on the agenda, the more likely we are to get people to come to the meeting because they see that they have a responsibility, and the more likely we are to get after the meeting commitment to follow through on things because you gave me credit. You put my name on the agenda as either a subject matter expert, as a topic leader, and so now I feel more committed to the process. So there is really good reason to include the time, the items or topics, and then who's going to lead each agenda item as the topic leader.

[00:22:02.92] And then before you wrap up the agenda, you want to identify what to bring to the meeting. So does that mean I need technology, do I need calendars, do I need parts of the project that I need to present to my team members or to the client? And what does the client need to bring? Sometimes I've created agendas where the To Bring item is an openness of mind and a willingness to make decisions. So it can be tangible items and or it can be mindsets.

[00:22:36.92] So the meeting agenda structure, the pushback I often get here is, Jana, why are you so regimented on time? 8:00 AM, 8:03, 8:10, 8:22. And the reason that I am is that I want to help everyone in the meeting recognize that we do have a commitment to honor our start time and our end time, and that if there's a topic that needs more time, then maybe we need to take an item further down the agenda off and hold it for a future meeting.

[00:23:10.64] So speaking about time, let's go to this meeting agenda Length of the Meeting section, where we're able to say, what's that special secret formula, Jana? You mentioned that we can do a better job of estimating how much time a meeting will take. And so the way that we do that is to be able to think about how much time is required. Well, let's do a formula that says the number of people-- so this is a little bit tricky. I practiced it yesterday and it's not nearly as easy as riding on a white board or a flip chart. But that's the number sign, which in modern parlance is a hashtag, right?

[00:23:50.56] STEVE VILLACHICA: Yes.

[00:23:51.32] JANA KEMP: In this case it's a number sign and then this is the letter P for people. So the number of people in the meeting will effect the amount of time that the meeting takes. And I understand that often your team sizes are anywhere from four to eight people. So let's use the high numbers for the purposes of this discussion.

[00:24:12.33] Let's say your team meeting or your team client meeting has a total of eight people. And on the first item where we're giving updates, we're going to allow each person one minute-- 60 seconds-- to provide that update. Well, we already know that Jana talks a lot and so we need to figure she might take three minutes even though we told her one minute. Which this
is an example because, as I said to Steve, I also teach time management classes so I'm really mindful about the minutes. But we'll play this out as an example.

[00:24:44.67] So we've got eight people, they each have one minute. We know a few people may take a few more minutes than that so we're already up to 10 minutes for one minute updates going round robin around the table. Well, that means that just for information sharing and no discussion, we've already used 10 minutes of the meeting. The next thing we want to consider is, well, is the item information sharing? Which this is an I. You know what, I'm at a funny angle but this is really truly an I.

[00:25:18.64] STEVE VILLACHICA: If you move the mouse.

[00:25:19.71] JANA KEMP: Oh, there, if I move the mouse over to another location. So let's try that again. So I for information sharing. Yep. That makes it more straight up and down. I was holding it at an angle. So this is a good lesson. When you're teaching people to use technology and to perform well, coach them on how to use the tools.

[00:25:36.50] So I for information sharing. That should take the least amount of time per person. The next, then, is the discussion, which I'll put a D and an I here. Or you might call it the work session. So we'll do a slash and say Work.

[00:25:54.60] So when we're in that, what are we going to do, who's got the information, what happened when you, all those kinds of questions that guide the project, that takes more time. Now with eight people at the table, we may find that three to five to six minutes is what each person needs around the table. Well, if each person takes six minutes, 6 times 8 is?


[00:26:24.05] JANA KEMP: Thank you. Quick math. 48. Well, that's already a one hour meeting. So now we have one go around the table share information, that took 10 minutes. And now we have one working discussion that just took 48 minutes. We're at 58 minutes and we need to summarize the meeting before it ends. Right? To say who's going to do what before the next meeting. So framing the questions that you will ask during this discussion and work time, that's really, really important to get clarity on what are we going to discuss, what are we working on and how much time will it take so that we don't run over the stated end time of our meeting.

[00:27:09.81] Well, there's a third thing to consider in the tasks that we're accomplishing, and that's are we making decisions. As we make decisions, as I shared with Steve, this actually takes the most amount of time because we're building on information sharing and we are having some sort of a discussion and working session before we get to that final decision point.

[00:27:39.23] The way to figure out how many items you can put on the agenda is to look at how many people are in the meeting-- so the number sign and the letter P, how many people-- to consider the I for information sharing, do we even need to do that today? Maybe we don't need a separate agenda item for that and we can go right into the discussion and working session and focus our efforts on who is doing what activity and what step in the process are we.
I know early on you focus on chartering your team. So your internal team is in discussion about, who are we, what are our values, what's our charter in detail? And each team ends up with a different one. Well, that takes quite a bit of discussion and clarification before you reach your final decision. That's why decision takes so much longer.

And what I have found is that often decisions have to have groundwork laid before people will commit yes or no to their decisions. So that's why it takes so long. And you often won't get a decision in the same meeting where you have first introduced the topic. So consider, if you want a decision, how much information do I need to share before I ask for the decision to be made? So we've got the length of the meeting and—let me pause there.

What challenges have you all run into with length of meeting? What pain points have come up? I know one question that came in was that our agenda estimates are always too short, what should we do? And I think the reason that people don't estimate the right amount of time is because they don't know the formula that we've just talked about and they haven't stopped to think about, well, how much time does each person talk along the way?

And that's consuming a lot of our meeting time so, Steve, maybe we need a different discussion on managing challenging meeting behaviors. Today we're just at the basics of the structure. So any questions from the team that's gathered here today?

STEVE VILLACHICA: I guess one of the things is I'm curious about—Jana's walked through a meeting template and then the logic behind that template and how you can manipulate parts of that meeting template in ways to align your meetings more with what you want to get out of them. I'm wondering, to what extent, given that we have a lot of people in our OPWL program who are also in the workplace, to what extent do your workplace agendas look like the ones that Jana has just provided and walked us through?

JANA KEMP: So I'll go back to that larger template. Those of you who are in the workplace, are you actually receiving agendas like this via the email invitation to the meeting or hard copy when you walk into the meeting room? And if you're not, my suggestion is—because some people will say, well, I don't want to prepare an agenda, it's too much structure—my suggestion to you all as meeting participants in corporate and government and nonprofit environments is to ask for an agenda. It could be as simple as, Steve, what's on the agenda? What would you like me to be prepared to discuss when we get together?

That way I'm letting Steve as our meeting leader know, hey, I need to know what we're going to do and I need to know what you want me to bring. Otherwise, in my head I'm thinking, I may not come to your meeting unless you can tell me what it's about. And one of my pet peeves in fact is being invited to a meeting of any kind where the purpose is not stated and/or an agenda is not shared. Because then I don't know whether it's a good investment of my time or not.

So as you're sharing some of your business workplace experiences, we'll come back to— you've now got that secret formula, as elegantly as it's presented there in the red pen, and we'll summarize the meeting template discussion about agendas-- to ask that question of,
when should we use an agenda? And as playful as we've just said, hey, what's on the agenda? My response is, every time you get together with one other person to accomplish work, you want an agenda.

[00:32:15.15] I can hear people saying, oh, that's too much work. Well, is it? Because if just Steve and I are meeting together, I can let you know that we e-mail agendas back and forth to each other. That not only worked for our email conversations because it included action items that each of us were taking responsibility for, it also then became the guidelines that we used as we prepared in yesterday's meeting for today's webinar.

[00:32:40.23] So I'm a firm believer in using agendas internally, with clients, in school environments, educational environments, and workplaces when it's a face to face meeting, when it's a conference call, and when there any technology calls or meetings. So a webinar is a technology driven call or meeting. And then also virtual exchanges and emails, which you just heard me reference. That as we had those action items for each other, those were essentially agenda items of what needed to be accomplished before today could happen.

[00:33:15.12] Because it's my profession, have a meeting agenda every time you get together. I want to go back to the fox hunt for a second. When you think about the agenda, there is a gathering. We know that the purpose is to get to fox and to have a great time socially so that we can be safe also and come back together for a future event. And the time frame for doing all that is before the event get clear about purpose, outcomes, and who we need to get to that meeting.

[00:33:49.83] In your case, you know it's the team members, the client numbers. That's a good future topic as well. Getting the right people to the meeting. We've said the day and the date will help people calendar, but at a future point maybe we can talk about-- or even today if we have time-- what helps get the right people to the meetings.

[00:34:10.58] Thanks, Devin. Monthly meeting with a published agenda, at least three to five days prior to the meeting. That's excellent practice. That's great. Each item has an owner but they don't have specific time allocations. So that might be a refinement of the agenda. It sounds like the organization is exactly on the right track to have those topic owners so that it's clear as a recognition as well as a take responsibility.

[00:34:39.77] And here's something that I use when I'm encouraging people to rattle the cages for improvement. I call it the elbow nudge. I'm not saying, Steve, you really need to improve your agenda and put frames. You're lacking. Instead I say, Steve, you're doing a great job. You've got the agenda items clearly identified, you've given owners to each of the topics and presentations. What if we tried-- so you're throwing the idea out-- what if you tried putting time allotments so that-- we use Jana again, use me as example-- Jana doesn't take so much time during the meeting and recognizes every one of these topics needs to have it's fair amount of time for discussion so that we can make good decisions and accomplish work effectively.

[00:35:28.82] So you suggest it as sort of an idea that timeframes for each topic might help us accomplish more work, make more decisions during each meeting. So thanks for sharing that.
That's helpful. Any other pain points around meeting agendas, meeting agendas, that have come up?

[00:35:48.71] One of the things that I would frame-- and feel free to jump in with typing-- one of the things I would frame is that, as I said when we were talking about the meeting template, always a lot three to five minutes for introductions and purpose statement. That way just-- here's a funny way of saying this-- but just because people's bodies are in the room doesn't mean their brain has arrived. So you need that first couple of minutes to remind people, why are we here, what is it that we need to discuss today.

[00:36:18.93] Especially in business environments where a lot of the same people serve on the same teams and then they can get muddied about, well, which discussion are we really on today? Which top secret project are we really talking about right now? So being clear with that introduction, three to five minutes, then you build your agenda items. And then at the end of the meeting before you just say, thanks, goodbye, you want to summarize-- and I'll model that at the end of the webinar-- summarize, what did we address today, what work did we accomplish, and what assignments got made. So, Steve, I heard you with a thought?

[00:36:57.68] STEVE VILLACHICA: I'm curious. We have people online who completed the OPWL program and other people who are in the OPWL program, and if you think about the pain points related to meetings for your OPWL projects, what are those or what have those been?

[00:37:17.65] JANA KEMP: That's a great question. As long as it's not too painful to dredge those memories up, let us know.

[00:37:23.27] STEVE VILLACHICA: Exactly.

[00:37:23.98] JANA KEMP: What are some of those challenges and pain points that you ran into? And I will say that using technology like this is great because we can all tune in from different locations. It is challenging, not quite a pain point, but it's challenging because without the facial clues of, hey, we really don't have any, or, oh, yeah, I really have one I want to share, it's difficult to know if someone is wanting to participate or whether you're all saying, elbow nudge, just move on. So thanks for this question.

[00:37:58.08] Do you have a process that you use to prioritize agenda items? Sometimes it's necessary to pick and choose which items to keep on the agenda and which ones to move to a different meeting. Yes. The process is, choose agenda items that help you accomplish work and move the work product forward in time toward accomplishment.

[00:38:18.78] Things that are nice to know, you're right, sometimes they go by the wayside because we don't have the time to share that great news about what happened on Friday or we don't have time to explore the tragic weather news that people in other places and maybe some of our families are challenged with and dealing with. And those are all part of social rapport building content but they don't help us to accomplish the work that we are gathered together to accomplish. So prioritize based on what needs to happen soonest or fastest and what needs to happen in order to move us forward to our next milestone of accomplishment.
The other thing that I do when building agendas is I make sure that the most important things are at the top of the agenda. So that if those discussions take longer, I can move things at the end of the agenda to a future agenda time or I can determine whether some of those information items can be shared in an email. Sometimes we can use complimentary technologies-- so we can be face to face in a meeting, we can use our emails-- to accomplish more work in a shorter amount of time and use those emails for information updates that don't require discussion and save our meeting time for discussions.

So that's two or three ways to help prioritize. The third-- the fourth thing I would reiterate is to say, sometimes you have to say, you know what, we have to hold this agenda item for a future agenda. So some people will use what's called a parking lot or a future agenda flip chart, literally on a wall or on a corner of your white board, and say, you know what, we need to hold this topic. We aren't losing it, we honor that it's important to talk about, we can't get there today so we're going to move forward in time.

Does that help? Some concrete ideas. Any other questions as well, kind of multitasking? OK. Thanks. I'm glad that makes sense.

STEVE VILLACHICA: One of the things that I've also seen in meetings is that different teams have their different rules for meetings, and some teams, the playground rules that they decided to live with, can allow people to show up for meetings who are not necessarily prepared for the meeting.

JANA KEMP: I think teams-- I think that's a default behavior, Steve. I don't know that teams actually agree to let people show up unprepared because it creates that feeling outcome that was undesired, which is, I'm frustrated that my team members didn't show up prepared to present or to make decisions and go forward. So interesting way to pull all those parts together about what's the outcome. Whether we intend it or not, there are going to be emotionally driven outcomes.

So let's talk about the, so what? We've had the meeting, we used our agenda, we introduced our purpose, we carefully orchestrated the number of items and how much time it would take, and we summarized. So the use of the agenda is actually the first thing for getting action to happen after the face to face meeting or the conference call or the technology driven meeting.

Part of the end of your meeting time, in that summary of what we've done today, is to invite volunteers-- which is that invite commitment piece-- and if no one volunteers, to go ahead and make assignments. Now, when you're in a workplace, that gets a little bit more challenging because there's the political structure within the workplace and you may not be in a position or have authority to make an assignment.

However, you may be in a position to volunteer your services at a future meeting or your commitment to accomplish work to get the ball rolling. So inviting commitment is the kind way of doing things. Making assignments is a productive, effective, efficient way of doing things. However, it may or may not get buy-in. And just because I've made an assignment doesn't
mean you have agreed to do it. So when you summarize the meeting's conclusion, you really want to get that really face to face, or audible if you're on a conference call, commitment, yes, you can put my name down for that, I'm committed to doing that.

[00:43:06.85] And then we've got the minutes or the notes. You all are using the language decision logs as well. This is a pain point for most groups in every sector that I've worked with. Oh, why do we have to take minutes, why do we have to write it down? It takes too long, I don't know what I'm supposed to put in the minutes. And as I shared with Steve, I actually have a four hour workshop on taking effective minutes.

[00:43:33.68] The bottom line, though, or the take away if you will, is to record who will do what by when and to document any important decisions that were made in the meeting. Because, especially in technology environments, things change in the technology environment so quickly that if we don't document when decisions were made we may not be able to, especially in your BSU project space, may not be able to document that, yes, in fact, the client did agree on such and such a date that this is what they were expecting as an outcome.

[00:44:11.07] So having that document serves as a protection. It also serves as a way of getting people to do their assignments or their committed work in between the meetings themselves. So start with the agenda, get the minutes and notes taken, create your decision log, which you'll also want to have as part of your portfolio as you complete your semester and defend your project work. So be sure to log that along the way. In this case you have multiple benefits.

[00:44:42.65] And then on a human task management level, it's really important to check in before the next meeting. If you're the-- especially when you're the team leader or the meeting leader. I see that I've got six people committed to certain action items and so I want to check in before everybody's sitting in the room to make sure that those tasks got accomplished. Maybe I need to get more information from a client or a stakeholder before I can even commit-- or before I can complete the work. So I need to have those check-ins if I'm the team leader to make sure that that is-- that work is moving forward successfully.

[00:45:22.89] So we had an agenda template. Let's look at the template. Steve has a question. Sorry.

[00:45:28.58] STEVE VILLACHICA: I have the luxury of being here with Jana and I saw an opportunity and wanted to take it. One of the things I know with our virtual teams is that it's really hard to carve out team meeting time. And I also understand why it's really important to have that check-in before the next meeting because that's a way of getting organized and making sure the meeting targets what it needs to.

[00:45:55.40] Are there tricks that you've seen virtual teams use? Do they typically, for example, appoint a meeting wrangler who is responsible for following up with people or do they set up an asynchronous tool where people need to report back before the meeting and then that's used to draft an agenda and people agree with the agenda? What are the different tricks that teams use?
JANA KEMP: Yes. Yes. Steve, you listed about four tools that can be put into place, and I've seen different teams use each one of those. The more technically savvy a group is, the more they will rely on the online tools and project management type spreadsheets. The less technologically savvy, it's, get up, leave your desk, walk down the hall, go downstairs, check in physically in person with people to make sure that they had what they needed, they were able to accomplish what needed to get done before the next meeting. So it kind of depends--

STEVE VILLACHICA: Or email, call or text.

JANA KEMP: --culture. Well, email, call or text, depending on what my learning style is, [INAUDIBLE] for OPWL discussions, and depending on what my response-- best response mechanism is. For instance, I've got clients that don't text at all, don't like email, and still expect a phone call. I've got other clients that will juggle I'm texting if it's a short set of questions or directions but also rely on email because they want a paper trail for themselves and their project logs of what else was involved.

And so the and world-- text and email and phone calls and voice mail and-- it actually makes it more difficult to manage projects because we have more vehicles for communicating. And now it's on us as project team members to know our stakeholders and our clients well enough that we know what vehicle of communication will work best for them. So there's not one best answer except what's best for Steve and what's best for Jon and what's best for Brig and what's best for Devin. We need to know that individually and then use the best tools from there. It does make life more complicated because it's not a one solution answer.

So the tools for getting action after our meeting has happened, this is another template document that I will remind you to include the day, date and year. You cannot believe the number of minute documents I have seen in every industry that do not include the year or the date of the minutes. It'll just say who got together and what was the name of the group. And I will tell you that, effectively, without the date and the year they're worthless. Because especially in technology environments with things moving so quickly, a decision made two years ago is probably worthless today. Even if it was a foundational decision point, we've already acted on it and move forward. And so we just have to have that date.

So another question that comes in is, what does a meeting leader do as it relates to the minutes specifically? They can assign someone to take the minutes. What I've seen work most effectively in teams is if there's a rotation meeting by meeting of who takes the minutes. That way the burden is not always on the same person and everybody gets their skill
building moment to practice taking the notes and recording what's going to be done, by whom and by when. So the meeting leader or team leader needs to make sure that in the minutes get taken but doesn't have to be the one to record them because their job is to get the agenda set, to facilitate the meeting, and to make sure that the minutes are produced but not have to produce the minutes themselves.

[00:50:29.51] Great question. So keeping the minutes. This is a guideline that a lot of the corporate clients I work with and government clients I work with ask. How long do we have to keep the minutes? It's kind of like that proverbial tax document question. Do I keep them forever or for five years or seven years? And it depends on your corporate status versus your personal status. So this slide gives you a good reminder that we do need to keep them.

[00:50:54.15] Now, for your OPWL program, you for sure want to keep them through the end of the semester. You might want to keep them all the way until the defense of your master's degree if it is a building process that shows, hey, I did all of my coursework in every course and here's my proof. And then you may trash it. I've met people in their 60's who still have their thesis documents bound and kept because that was a major accomplishment. So you've got some flexibility on the personal front.

[00:51:23.61] Back to the corporate front, there are specific guidelines that attorneys work with groups about board minutes versus internal team minutes. And the general rule of thumb for the kinds of work that you all are doing is, once the project is complete, ask internally do we need to keep these minutes? Or, now that the product is for sale can we not have to keep all that documentation? So there's a little bit of flexibility there.

[00:51:54.06] We have along the way talked about some of the challenges. We probably have time for one more question before we summarize today. As you're reflecting on what other pain points you might have about meetings, specifically, I draw your attention to the image on the screen. I work with a variety of engineering clients and the very first time I put this up in a government engineering meeting the outward laughter was both heartwarming and shocking to think, oh, people resonated so clearly with this image of the bridge not connecting up.

[00:52:32.82] The structures and templates that we've used today to create more effective meetings are to prevent us from having projects that don't deliver on expectations and can't be used by internal peers or by our client groups. So what we've talked about today is in the Pre-- before the meeting-- column. What's our real purpose with our outcome? How will we measure the success of it? What do we want people to know or feel or to be able to do? And then that agenda template that you have as a take away.

[00:53:06.93] And then during the meeting-- which some questions came up about what do I do during the meeting-- this could be a whole separate webinar, but the meeting leader, whoever called the meeting or whoever the team leader is, wants to make sure that the facilitation happens in a way that we accomplish the tasks-- in other words, the agenda-- in a manner or procedure-- brainstorming, voting, decision making-- that keeps us willing to work together, which is the relationship. And then in the Post column, after the meeting, we've just talked about. We want to
document our action items, document our decisions to maintain a decision log, so that we can create the very next meeting agenda which takes us right back into the pre-meeting work.

[00:53:52.02] All right. Fingers at the keyboard. Ladies and gentlemen, this is your closing action item from today's webinar meeting. What do you personally and as a team member commit to doing by, let's say, your very next internal team meeting or client meeting? Those of you in the workplace right now, maybe you are committing to something by the next staff meeting that you are participating in. So what is it that you personally are committing to doing by and that blank is when. By the next meeting or by a meeting on a certain date when maybe you are expected to give a presentation. And I'm hoping to see responses from all of you and I'm going to put Steve on the spot and ask him to share what he is going to do differently as a result of today's webinar as well.

[00:54:42.00] STEVE VILLACHICA: I will add time estimates in agenda item in the next agenda I create.

[00:54:49.41] Helpful. And it'll help you plan overall number of agenda items and it will help people know, oh, I better hurry up and talk because we don't have a lot of time on this agenda item. So what are your individual commitments as you think about what we've talked about today with structure--

[00:55:08.11] STEVE VILLACHICA: Also strikes me that if I start adding those times, it's like when I work with a novice constructional designer, one of the things that they have a hard time doing is estimating how much time it will take.


[00:55:21.85] STEVE VILLACHICA: If I start collecting those times and note when I am able to live within them or the times too long, the times too short, I'm going to start building that sense of how long is it really going to take.


[00:55:35.59] STEVE VILLACHICA: And if I don't actually prac-- put that out there and practice against it, I'll never get better at managing against those estimates. I won't be better at estimating and I won't be better at managing against them.

[00:55:49.33] JANA KEMP: That's a perfect summary paragraph of how the process needs to work. Practice, measure against it, keep refining the process for improvement. So I saw some of you typing and I'm sensing a hesitance to commit to what am I personally going to do in my workplace or on my team. So, Steve, I'm going to leave that to you to hold team members accountable. Not just the people who logged in-- thanks for doing that-- and participated actively, but also the people in your class that maybe could have benefited from being here as well.
Those of you watching this as a rebroadcast, if you will, go ahead and jot into your own notes, I will do what to improve meeting structures, experiences and processes and by when. Because the point, as we summarize for today's time allotment is, whatever you do, make meetings to the point, on time and actionable. And you have a way to get a hold of me. So if you have questions, please do feel free to reach out. I'm Jana Kemp and I want you to make meetings matter.

STEVE VILLACHICA: Jana, thank you so much for your time with us today. I want to thank all of our webinar participants for being here and the time you've taken. And this now concludes our webinar. Thank you for attending and thank you for participating. Goodbye now.