

Conduct More Effective Staff Meetings

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Meetings can be a very powerful way for communicating with the team and for team training. However, unless designed for success, meetings can end up being a waste of time, thus sending the message they are not important.

To help you have effective meetings, please follow the simple steps outlined below.

PURPOSE

- Identify the purpose and desired outcomes of the meeting.
- Determine if the meeting is necessary or if the issues can be addressed outside of a meeting.
- Use meetings for brainstorming, delivering or gathering information and for training the staff.

PEOPLE

- Identify and invite only the necessary and appropriate people for the meeting.
- Make sure all attendees can contribute.
- Communicate the meeting's purpose and desired outcomes to all attendees.
- Schedule guests who don't need to be at the entire meeting, which can be an incentive to stay within the meeting's time limits.

PREPARATION

- Organize meeting venue.
- Provide the agenda and any other supporting documentation (e.g. reports, handouts and spreadsheets) to the attendees at least 24 hours prior to the meeting time.

- Ensure the comfort, quietness and set-up of the space before the meeting.
- Provide water or other refreshments when possible.

AGENDA

- Include items to be discussed, and then for each item specify the person leading the discussion, the desired outcome, and the estimated time.
- Begin meetings with the declaration of your practice vision. This has two purposes:
 1. It will remind the team of what you are about.
 2. It will answer the question “why are we meeting?”
- Provide meeting evaluation time and documentation (if applicable).
- Limit number of items to a reasonable amount for the meeting’s timeframe
- Be realistic about the timeframe for each item.
- Schedule breaks periodically for longer meetings.

MEETING LEADER

- Designate a meeting leader who understands the meeting principles, is familiar with the agenda and is a skilled facilitator.
- Rotate facilitators for regularly scheduled meetings.
- Open meeting with setting or reviewing ground rules and reviewing the agenda, making changes when appropriate.
- Clarify roles within the group.
- Maintain focus and keep meeting moving at comfortable pace.
- Cover one item at a time.
- Summarize discussion and recommendations at the end of each logical section.
- Make a note of any follow-up actions that can be resolved outside of the meeting and move on to next point.
- Manage discussion and encourage participation, even explicitly inviting everyone to participate.
- Use parking lot list for issues or questions that need to be dealt with outside of the meeting and review at end of meeting.
- Review issues discussed at the meeting and identify each action step with those responsible for the step and the timeframe.
- Solicit agenda items for the next meeting.
- Review time and place for next meeting, if applicable.

- Lead evaluation discussion or collect written evaluations.
- Thank the attendees.

TIME

- Designate a timekeeper who will work with the meeting leader to keep the pace.
- Start and end on time, regardless of late attendees.
- Periodically check the time estimates for each item to see how close they were to the time actually spent.
- Allow flexibility in the schedule when the need arises.

MEETING NORMS

- Establish a policy disallowing electronic communications during the meeting.
- Determine that each participant's opinion should be respected.
- Encourage participation and openness.
- Ask questions for clarity.

MINUTES

- Designate a note-taker.
- Make detailed minutes when the record is important and simple lists of decisions made and actions to be taken (with responsible person identified) when the exact record is not as important.
- Capture key points for each item, highlight anything that will be deferred until a future meeting.
- Include timeframes for action steps.
- Include parking lot issues with follow up information.

EVALUATION

- Have each attendee evaluate the meeting, using a round-robin, written, or open discussion approach.
- Ask questions such as "what can we do better next time?" and "what parts of the meeting worked well?"
- If the meeting was for training, team members should be able to demonstrate their understanding of the subject before the end of the meeting.

- Participants should agree on what changes are expected to take place in the practice as a result of the meeting and by when. These resolutions need to be captured for following up and for accountability.

FOLLOW UP

- Return readable or typed minutes to attendees within 24 hours if possible (same day is even better).
- Be consistent with meeting habits.
- Persons who have taken action steps on themselves should report to someone in the practice of their progress within the allotted time slot.

ACCOUNTABILITY

- Without changes having taken place in the practice, the purpose of the meetings will be a total waste. Meetings are about improving an area in the practice. This change should be measurable. Someone needs to keep track of such a change and report to the involved parties and to the practice leadership.
- If change has not taken place, someone needs to be held accountable.

Are meetings an investment or an expense?

If you agree that meetings are a good investment, then why not do more of them? If conducted properly, followed up and positive changes having taken place, staff meetings and training can give you the results you have always dreamed of in your practice.