

The Consulting Team's

Leadership Tips



NOTE FROM MARILYN MANNING, CEO

Recently I read a news article from a major newspaper announcing that these tough economic times have created dysfunction in the workplace, as underlying issues have bubbled to the surface in the resulting stew. After my many years of consulting, I believe it doesn't have to be that way.

In fact, there many opportunities to cope well with the current workplace challenges and thrive, grow, and succeed. It's a matter of how you apply your focus and energy, and the tools you use to enhance the outcomes for you and your workgroup.

This issue of Leadership Tips begins a series of articles for you, the individual in the workplace, and what you can do to help yourself and others succeed with today's challenges. In this issue, we will provide you with tools to apply to help better manage meetings, making them more efficient, effective, and team enhancing.

Warm regards,

Marilyn Manning, CEO •

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Tips and Tools for Meeting Management: Reducing Stress While Increasing Productivity



Many workers grumble about the number and length of meetings, especially when work loads increase. Maybe they have something there.

This is a good time for meeting leaders to ask themselves the following questions to determine whether they need to call a meeting:

- ✓ If you can't communicate a clear, specific meeting purpose and outcomes, don't convene the group.
- ✓ Reconsider regular, periodic meetings, i.e., staff meetings. They may be more habitual than necessary.
- ✓ For status meetings consider follow-up with individuals or ask only those with critical or foremost action items to attend.

Since some meetings will always be with us, here are tips to help you get the most from your meetings in the least amount of time.

Successful meetings start with preparation. A few minutes invested in planning can save hours of unproductive meeting time.

(continued on p. 2)

Meeting Preparation:

When you lead a meeting, sending out an agenda in advance is the first step to success. A helpful agenda includes the following information:

- ✓ The date, time, and place of the meeting.
- ✓ A brief purpose for the meeting and its expected outcomes.
- ✓ A list of agenda items that support the purpose and outcomes.
- ✓ For each agenda item, list who will present the item and a proposed time to address it.
- ✓ List separately anything the participants need to read, write, or do to prepare for the meeting (e.g. documents they might need to review).

Meeting Aids:

- ✓ Start all your meetings on time. If there are any breaks, reconvene promptly at the end of the break period.
- ✓ Review the agenda to ensure that all agree that the items will meet the purpose and objectives.
- ✓ Appoint a facilitator to monitor the time taken for agenda items. If useful, the leader may also ask the facilitator to encourage balanced participation.
- ✓ Appoint someone to take minutes; records of discussions and assignments (in the APF) are vital; *see Tools of the Trade*.
- ✓ Periodically end ongoing meetings with audits of what's working or needs improvement.

When a professional meeting facilitator is useful:

- ✓ The meeting is planned for a day or more.
- ✓ The agenda covers a vital organizational matter, like creating a two-year strategic plan.
- ✓ Your team's interactions may hinder progress.
- ✓ An objective facilitator, who will be perceived as neutral, can provide fresh perspectives and advice on effective meeting processes.
- ✓ An experienced, well-trained facilitator can share different ways of thinking that have worked well for others.

Recently, The Consulting Team was called in to facilitate a day-long change management retreat with senior management. We helped to structure the day and provide on-the-spot support. The outcome: *Dr. Manning facilitated a retreat for our Senior Managers to address issues related to effectively leading change. I think everyone, including me, was impressed and pleased with Marilyn's facilitation. It was a positive and productive exercise.*

-- Jim Erickson, City Manager, Benicia

Meeting Follow-up:

- ✓ Publish meeting minutes and APF within a week of the meeting.
- ✓ Follow-up on assignments listed in the APF.

TOOLS OF THE TRADE: Action Planning Framework (APF)

This framework can be filled out in meetings, with assignments reviewed before adjournment. It is published with the minutes and reviewed at the beginning of following meetings to ensure assignments are completed promptly.

| # | Action Item | Assigned To | Date Assigned | Date Due | Date Complete | Comments |
|---|--------------------------------|--------------|---------------|----------|---------------|-----------------------|
| 1 | Publish Minutes | Gary | 10/15/09 | 10/18/09 | 10/17/09 | Review w/ Jan first |
| 2 | Complete Contract | Jan and Elsa | 10/15/09 | 10/22/09 | | Legal to Approve |
| 3 | Train staff on systems changes | Ed and Andy | 10/15/09 | 11/20/09 | | |
| 4 | Track sales results | Devon | 10/15/09 | Ongoing | | Review results weekly |

Want to Learn More About This Issue of Leadership Tips?

Here is a sample of what we have to offer....

Visit the following links for more information:

Our Free Assessments:

- ▶ [Leadership Competency](#)
- ▶ [Am I an Effective Change Agent?](#)

Our [Consulting Services](#):

- ▶ Meeting Facilitation
- ▶ Strategic Planning
- ▶ Conflict Mediation
- ▶ DiSC Communication Style Assessment
- ▶ Team Building

View [Descriptions of Related Training](#):

- ▶ [Meeting Management Skills](#)
- ▶ [Manage People Not Personalities](#)
- ▶ [Lead Like a Pro](#)
- ▶ [Leading Positive Change](#)

Read Related [Articles](#):

- ▶ “Meetings, Bloody Meetings”
- ▶ Dealing with Stress In the Face of Change
- ▶ Peak Performance Principles

Quick Tips Brown Bag Workshops

- ▶ The Consulting Team is providing low-cost, brown bag workshops! Call Marilyn for details: (650) 965-3663.

About Leadership Tips

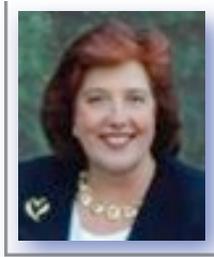
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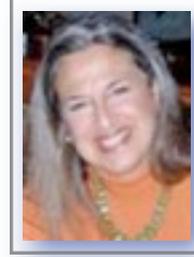




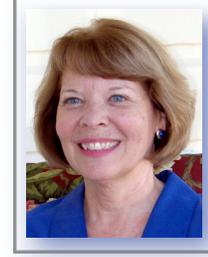
**Marilyn
Manning, CEO**



Nan Andrews-
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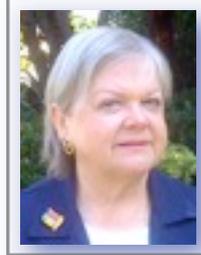
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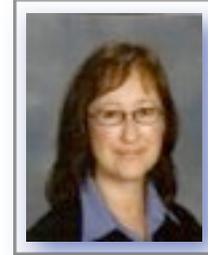
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Braly



Pat
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Howard
Miller



Victoria Smith-
Raymond

Meet Our Core Team

Our Core Team of consultants each bring over 15 years of experience and individual expertise to add breadth and depth to our services. Over the coming months, we will introduce you to each of them. This month we feature:

Pat Haddock

Pat Haddock has been a communications and training consultant for more than 20 years. She helps clients manage change through comprehensive communication plans; attract, retain, and develop high-potential employees; communicate and implement key policies and procedures; and improve employees' professionalism, customer service skills, and business communication. Her specialties are human resources, academia, city and county government, financial services and products, and health care.

Ms. Haddock develops and delivers training programs for both classroom and virtual platforms. She helped pilot the introduction of synchronous learning at Stanford University. She also has managed major marketing communication campaigns and change management projects for her clients. Her clients include University of California Santa Cruz, Stanford University, Foothill and DeAnza Colleges' Business and Industry Institute, San Jose/Evergreen Community College District, California Public Utilities Commission, County of Santa Clara' and the Cities of Sunnyvale, Mountain View, Palo Alto' and Foster City.

Ms. Haddock has served on the faculties of the City of Palo Alto's Management Academy; Administrative Professional Academies of Stanford University, California Public Utilities Commission, and City of Palo Alto; and the professional faculty of the American Management Association and National Judicial College. She has authored or coauthored 11 books and more than 600 articles for print and web. Before starting her consulting practice, Patricia was an assistant vice president and senior communications consultant for Bank of America, where she was responsible for researching, writing, and editing human resources and employee benefit communications. Ms. Haddock has a BA in English from USF.