Experts' view: Strategies for making your meetings effective and useful

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Unless you're very lucky, you've probably had to sit through more than your share of pointless, interminable meetings. Instead of promoting key decision making, information sharing, and productive collaboration, such meetings tend to be ill-planned, poorly run, and plagued by time-consuming digressions.

Fortunately, it's possible to steer meetings in a more positive direction. Project management experts Shannon Kalvar, Mike Sisco, and Tom Mochal have identified several strategies for making meetings beneficial for everyone involved. This collection offers some of their suggestions.

Table of contents

10 things you can do to turn useless meetings into productive ones

By Shannon Kalvar

A quick survey of Amazon.com reveals hundreds of books purporting to help manage meetings. The vast majority do, in fact, contain good ideas if you initiated the meeting, have the ability to set its agenda, and possess the social skills to keep all of the attendees focused. However, we all must occasionally attend meetings we do not control. What do we do in those meetings, especially when they go awry? The following tips will help you make each meeting an effective, interesting experience. No IM required.

1 Know why the organizer called the meeting

The idea of a meeting agenda seems almost quaint in this era of too much e-mail and not enough time. When an actual agenda makes an appearance, it quickly breaks down as participants meander in a variety of unplanned directions.

Do not wait for an agenda. Instead, take a moment to contact the meeting organizer before the meeting. Ask him to explain to you, in 10 words or less, what he wants from the meeting. Once you know what he wants, you can help him achieve it.

In this case, forewarned is forearmed.

2 Know what you want from the meeting

Finding out what the meeting organizer wants allows you to help him; knowing what you want from the meeting allows you to help yourself. So before the meeting begins, set yourself one action item you absolutely need to accomplish with this group of people at this time.

Select an action item compatible with the meeting organizer’s goal if you want the meeting to succeed. Otherwise, you could end up with a reputation for disrupting meetings.

Whether that’s bad depends on your point of view.

3 List what you need to say

Meetings never start on time. Someone always needs a cup of coffee or has to answer a cell phone call about an unforeseen disaster. These idle moments make an ideal time for firing out instant messages to friends, family, and co-workers.

You can also use this time to make the meeting more productive. Jot down a list containing five things related to the action item you want to share. The act of writing helps focus your thoughts, even if you don't use the list at all.

If you have something to say to the people in the meeting, you might not have to send IMs after all.

4 Take the meeting minutes

Meetings come, meetings go. Their details vanish into a haze of similar events because no one bothered to write them down. Then the next meeting rolls around, and you spend the first 10 minutes trying to remember what happened last time.

Break this cycle by taking the meeting minutes. You don't have to record everything everyone says. Instead, focus on recording assigned action items, decisions made, and key information or questions revealed during the discussion. These minutes then become the meeting’s artifact, the record of what happened and what decisions came about. This record guides whatever actions take place after the meeting ends.

As the writer, you make most of the judgment calls about what was important.

5 Keep to the rules of order

All meetings, large or small, involve people interacting to achieve one or more goals. In a perfect world, these interactions would spontaneously organize themselves. Everyone would respect one another's time. Comments would emerge in an organized fashion. Action items would appear and be agreed on, and the group would move to the next point.

Back in the real world, we need ways to stay organized and on track. You do not have to adopt Robert's Rules of Order, but you should know the ground rules by which the meeting will run. If your organization does not have rules of order, make some. Share them with others and follow them.

Chaos happens, but you do not have to let it ruin an otherwise productive meeting.

6 Reflectively listen in information meetings

There exists a breed of meetings seemingly designed to frustrate the attendees. These meetings "provide information" about a topic or update the attendees about the status of things they do not care about. In the breed's most extreme forms, no one at the meeting can do anything with the information provided.

That does not excuse you from finding something useful to do. The meeting organizer obviously needs to communicate this information. Take the opportunity to practice your reflective listening skills. You get some practice, and the organizer will feel like he positively connected with someone.

It's a win/win, or as close as you can get in this situation.

7 Set things aside

It never fails. In every meeting, someone derails the discussion with a host of interesting tangents. Sometimes these tangents relate to the topic at hand. More often, though, they affect it only indirectly. In either case, the time spent on them detracts from the meeting's real goal.

Do not be this person. Ask yourself the following question before you interject a new idea or question: Is this really the right venue? If the meeting focuses on brainstorming, go ahead. If not, and if the question/idea does not directly relate to the meeting's goal, set it aside for later conversations. Make it an action item, so you do not forget it.

Yes, everything connects to everything else in business. That doesn't mean you have to bring it up in a focused session.

8 Ask for action items

The meeting ends, someone cleans up the conference room, and…then what? Ask the meeting organizer for action items as the meeting starts to wind down. If need be, prompt him by asking if he wants you to take care of one or more items you noted during the meeting. Alternately, you can make some up if you have a good idea of what needs to be done.

Action items speak louder than words when it comes to ending meetings.

9 End the meeting when it's done

Meetings, with or without agendas, often drag on long past their useful lifespan. People get lost in quagmires or the meeting organizer forgets what he's there for. Nothing useful gets done, but no one can escape without offending the powers that be.

Fortunately, you have a 10-words-or-less description of the meeting's goal from your previous research. Ask the meeting organizer if he has achieved his goal. If not, help him get to it. If yes, mercifully end the meeting before everyone goes insane.

Mercy is, in this case at least, one of time management's greatest gifts.

10 Ask questions afterward

Meetings gather informed, active people into one place to address an established list of topics. Why not take advantage of the opportunity? If you have questions for someone who will attend the meeting, make a list of them before you arrive. Then, during the after-meeting meeting, whip out the list and get your questions answered.

Asking unrelated questions in the after-meeting meeting means you do not have to disrupt the meeting with them.

With these 10 tips you can participate in the meeting rather than just attending. Actively participating reduces your stress levels during the meeting. It also gives you some control over what happens next.

10 things you can do to organize and lead effective meetings

By Shannon Kalvar

In the previous article, we suggested ways you can add value to the meetings you attend, even when the organizer isn't entirely on top of the proceedings. These suggestions, though, can go only so far in correcting a derailed meeting. It's far easier to take corrective steps while planning and leading a meeting, assuming you have control over the process. The following tips will help you conduct your meetings so that they're productive, effective, and interesting.

1 Know why you called the meeting

We accept meetings as a fixture of modern business. Unfortunately, not all fixtures are created equal. In fact, some have almost no purpose beyond the ritual consumption of paper and time.

Do not allow your meeting to fall into the ritual consumption category. Spend five minutes before you send out the meeting invitation to formulate, in 10 words or less, exactly why you need everyone's time. Write your reason down and then set it aside. Review the reason an hour later; if it still seems valid, go ahead and send out the invitations.

Ritual consumption may work for sacred cows but it's not good for meeting organizers.

2 Know what action you expect from the meeting

Meetings draw people away from their daily tasks and into a closed, influenced environment. As the organizer, you have the attendee's attention. It's up to you to use that attention wisely. The moment you squander it, the meeting grinds to a halt.

Do not squander others' time. Instead, spend a few minutes before the meeting trying to answer the following question: "What do I expect the attendees to DO at the end of this meeting?" Try to formulate your answer in 10 words or less.

Knowing what you want from others makes it much easier for them to give it to you. Otherwise, everyone tries to engage in mind-reading with depressingly predictable results.

3 Never send a meeting to do a conversation's work

Electronic messaging systems give us the power to invite everyone and everything in the organization to meetings. The power to do something, though, does not make it a wise or even a correct choice.

If you need to speak to only one or two of the meeting's attendees, just go to their cubes and have a conversation. It takes less time, communicates more information, and establishes that "personal touch" everyone claims has vanished from modern business.

And hey, if worse comes to worst, you can always IM the person while you're in someone else's meeting.

4 Designate someone you trust to take the minutes

The power to designate action items is the power to change the world. Okay, maybe not quite. But it is the real power to be had in a modern business meeting. As the meeting organizer, you want to make sure this power rests either in your hands or in the hands of someone you trust.

An amazing number of meeting organizers seem averse to taking their own meeting minutes. "It's secretarial" or "It's too much paperwork," they say. However, the minutes become the permanent record of what was agreed to and decided on. Take the minutes and circulate them yourself or have a trusted associate do the honors.

Oh, and you do not have to write down everything said at the table. A list of action items and agreed to dates will suffice.

5 Establish the rules of order

All meetings, large or small, involve people interacting to achieve one or more goals. In a perfect world, these interactions would spontaneously organize themselves. Everyone would respect one another's time. Comments would emerge in an organized fashion. Action items would surface and be agreed on, and the group would move to the next point.

Back in the real world, we need ways to stay organized and on track. You do not have to adopt Robert's Rules of Order, but you should know the ground rules by which the meeting will be run. If your organization doesn't have rules of order, make some. Share them with others and follow them.

Chaos happens, but you do not have to let it ruin an otherwise-productive meeting.

6 Start on time, end early

There are a wide variety of ways to waste time before a meeting begins... and that's before we even start thinking about wireless networking. Similarly, all but the most focused meeting will run into distractions and other “personality issues.”

When you schedule the meeting, deliberately ask for more time than you think you need. Generally a half-hour pad will cover most tangents or quirks. Try to start within three minutes of your beginning time. Then, end the meeting when you achieve your actual goals (see points 1 and 2).

People rarely, if ever, complain about meetings ending early. The same cannot be said for meetings that drag on without any hope of resolution.

7 Maintain focus

It never fails. In every meeting, someone derails the discussion with a host of interesting tangents. Sometimes these tangents relate to the topic at hand. More often, though, they affect it only indirectly. In either case, the time spent on them detracts from the meeting’s real goal.

Do not let this happen to your meeting. Stop tangents as they form. Cut off speakers who want to ramble on about related but unimportant issues. Develop and maintain a reputation as a hard, organized meeting leader so that people don't challenge your authority during the meeting itself.

Yes, people will become upset at first. However, in the long run, even the people you cut off will eventually appreciate your attempts to avoid wasting their time.

8 Assign action items at the end

The meeting ends, someone cleans up the conference room, and… then what?

Begin assigning action items at the first moment of consensus. Start at the top of your list of agreed-to items. In some cases, a participant will have agreed to the action item already; in other cases, you will have to assign it to someone on the spot. Either way, get verbal acknowledgment from each participant that he or she understands and accepts the action item.

Action items speak louder than words when it comes to ending meetings.

9 Verify agreements

If the power of a meeting rests in its action items, the long-term effect of a meeting often comes from the agreements reached during the course of discussion. These agreements help guide both the meeting's action items and future interactions among the participants.

Take a minute at the end of the meeting to summarize what you agreed to. Record it in the minutes just under those action items you assigned. This allows you to verify that you properly understood the agreement and that the meeting attendees reached a consensus on the issue.

Consensus and agreement are not bad words; they just get badly misused.

10 Follow up with assignments and agreements

As a general rule, people remember the hurt feelings, annoyances, and frustrations of a meeting rather than whatever work got done. As meeting organizers, we generally help this negative association by not following up with the participants after the meeting comes to an end.

Spend a few minutes with each meeting participant after you send out the meeting minutes. Answer any questions they might have. This personal touch may seem quaint, but it makes a huge difference in how well people react the next time you call them to a meeting.

Nothing is a substitute for good manners.

By following these simple tips, you can run a more effective meeting. Be warned, though: Effectiveness sometimes attracts notice. Notice leads to responsibility; responsibility leads to risk; risk leads to success; and success leads to even more work.

A well-planned kickoff meeting sets the tone for a successful project

By Mike Sisco

Your first project meeting is an opportunity to share your plan for leading the project to a successful completion. You should take advantage of this one-time chance to energize the group, set proper expectations, and establish guidelines that will help you complete the project on time and within budget. If you fail to prepare for this meeting, you'll put the project at risk right from the start.

When you leave the kickoff meeting, everyone on the project team must be on the same page. Your preparation beforehand will determine whether your kickoff meeting will offer the greatest benefit to team members.

Meeting preparation

Step 1: Develop the project goals and deliverables

Defining these elements will drive the decisions you must make for staffing the project and developing the project plan. Write them down and validate your definitions with the project owners (whoever justified and initiated the project).

Step 2: Identify the project team members and their responsibilities

Resource needs vary based upon the size, complexity, and nature of the project. Include resources from four key groups, as needed, to fully support your project:

- Operations
- Corporate support
- Management
- Technical

Develop a project team contact list that includes the name, responsibility, department, physical location, phone number, fax number, and e-mail address for each member. You'll want to distribute this to the team.

Step 3: Develop a project assumptions list

It's important for project team members to be aware of major assumptions that apply to the project. For example, spell out the assumption that each team member has been selected and made available to the project by their manager to ensure its success. That assumption means that their assigned tasks must take priority, and each participant must be committed to the success of the project if they are to participate.

Step 4: Develop the preliminary project plan

You can save a lot of time by going ahead and developing the tasks, responsibilities, and timeframes of the project plan. Going through this exercise will help you validate whether you have the right resources, identify risks, and determine the appropriate timelines for tasks and milestones.

Use whatever resources you need to help you create the initial project plan. The point here is that when you go into the kickoff meeting, you will already have a plan drafted. Doing so will save time and get the project off to a faster start.

Realize that the plan is not carved in stone at this point. Actually, it should never be. Up until the kickoff meeting, it is a knowledgeable draft. Once you have the team assembled and assign clear responsibilities, you should ask team members to validate their task responsibilities and timeframes for reasonability, completeness, and accuracy. The plan will become more established at the first project status meeting.

Step 5: Define key success factors

Every project team member needs to know what it takes to have a successful project. Take the time to define in specific terms each item that will be required for success. Validate your list with the project owner(s).

Step 6: Schedule the project kickoff meeting

It is important for all project team members to participate in the kickoff meeting. Send a communication to each participant with a preferred time and date and include options in case they are unavailable. Even if someone is "out of pocket," he or she can participate by phone.

Your goal here is to assemble the entire team so they all hear the same message at the start of the project. Instruct all participants to look for meeting materials on a specified date and to prepare for the meeting by reviewing them.

As soon as you have a firm time and date, schedule a conference room and phone services to support conference calls, as needed. Plan for a 90-minute meeting.

Personal note

In a recent project, I had 12 team members from four company departments located in seven physical office locations in five cities. It's not always feasible to get all team members in the same conference room, as in this case. By preparing a solid agenda, providing supporting documentation ahead of time, and organizing the flow of the meeting, you can conduct an excellent kickoff meeting that gets all participants focused on the same objectives, even when many do not know one another.

Step 7: Send the kickoff meeting materials to all participants

On your designated date, send a package of meeting materials to each participant, including:

- Meeting time and date with call-in phone number
- Meeting agenda
- Project participants' contact information
- Project plan draft

Ask each person to review the project plan carefully. Indicate that additional information will be discussed at the kickoff meeting and everyone should be familiar with his or her part of the plan. Explain that there will be a Q&A session at the meeting to answer any questions.

Step 8: Identify key issues and project dependencies

Review the project plan prior to the kickoff meeting and make notes on points you want to make at the meeting. Pertinent items include potential bottlenecks, impact issues, risk areas, etc.

What's next?

After all of your preparation, knowing how to conduct your kickoff meeting is the next step. In the following article, we'll detail the best way to lead a project kickoff meeting.

Follow these steps to conduct an effective project kickoff meeting

By Mike Sisco

The kickoff meeting for a new project is your best opportunity to energize the group and establish a common purpose toward completing the work. I've found that a great kickoff is the result of good planning. After you've done your project preparation work, you need to plan for an effective meeting.

I've developed a set of tactics I use to set the tone for the meeting. They help me stay organized, establish my leadership, and begin molding the individual project participants into a team. These tips should help you lead more productive project kickoff meetings.

The agenda

As in any effective meeting, participants are better off when they have a clear understanding of how it will progress. To better help team members prepare, I use the basic agenda shown in **Figure A** for most of my project kickoff meetings.

Figure A

Project Kickoff Meeting
Agenda

Project: ____________________ Project manager: __________________

Date/time: _____________ Participants: __________________________

Phone call-in number: _________________

Project description:

Purpose:

Goals and deliverables:

Project member introductions and their roles:

Project assumptions:

Project plan:

Key success factors:

Status meetings:

Other communication plans:

Question and answer session:

Summary:

The meeting

Keep the meeting flowing and avoid wasting time. Be personable and have fun; everyone will enjoy participating more if you take this approach.

Getting started

Take immediate charge of the meeting. Welcome all participants and don't forget to introduce yourself. Briefly explain that you'll walk everyone through the agenda and material and that you'll leave time for questions at the end.

Define the project, its purpose, and expected goals and deliverables. Introduce the project members and briefly discuss the role of each. You should do most of the talking in this first meeting. The kickoff is intended to bring everyone up to speed, not to discuss every item in detail. Every participant needs to see you taking charge of the meeting agenda.

Presenting the project

Now that you've set the tone, discuss the project assumptions that set the stage for how you developed the plan. Refer to the project plan document you sent to everyone and go through it task by task. Explain and reinforce to everyone that this is a "first cut" and that the important thing to do is verify that the tasks are comprehensive, assigned appropriately, and have reasonable time frames. The time to modify the plan is before the next meeting. Explain that the project plan becomes the foundation for status meetings and is used as the primary communication vehicle for managing the project. As you step through each task, point out key dependencies or factors you noted in preparing for the meeting that affect the completion of the task.

By walking the team through the plan, you'll be able to point out tasks that are potential bottlenecks in completing the project. Keep your discussion to the point. Don't get bogged down, but take the opportunity to help staff members anticipate problems. Reinforce key success factors and explain why they are important.

Establish a timeline and team member expectations

Determine an appropriate time and day of the week to conduct weekly one-hour project status meetings. Reinforce the need for everyone to attend and to have that week's tasks completed.

Take time to remind the group that teamwork is essential. Reinforce the need for participants to look out for one another. The objective is to complete the project successfully, and it is up to everyone to do their part and to help one another.

Empower team members to own their responsibilities and to ask for help. Repeat that you expect everyone to attend project status meetings prepared and with all tasks completed, unless you know well ahead of time that there are obstacles. Part of your project management job is to help the team identify bottlenecks and to eliminate obstacles.

Explain the communication plan

Discuss your plan to share information and updates with the group and interested parties, including the following:

- Weekly project status meetings
- Subproject planning sessions
- Project plan status updates
- Senior management updates
- Use of the company intranet or other communication vehicles

Emphasize the need to communicate anything that team members see that might affect the project.

Ask for feedback and then close

Open up the meeting for questions and answers. Be certain you've blocked out ample time. If time runs out, ask everyone to send questions to you or to call you. You can later send out an FAQ or even post it on your company intranet for people interested in staying abreast of the project.

Summarize the meeting with a call for action and list outstanding items that require immediate follow-up. Provide direction on any follow-up communication needed and what you expect from everyone at the first project status meeting.

Final thoughts

If you read both this article and the preceding one, you might have picked up on the four actions that will increase your success in leading a project:

- **Establish an organized presence**. Demonstrate to your team that you are on top of things.
- **Empower the team members**. Give each team member responsibilities and expect them to accomplish their assigned tasks.
- **Create teamwork**. Encourage all to help one another and to be accountable to the project. Everyone pulling together for a common cause can have dramatic results.
- **Demonstrate leadership**. Organize, empower, and develop the team, and everyone will see your leadership and follow.

Take advantage of the opportunity an effective kickoff meeting gives you. It can make a big difference in the success of your next project.

Create a standard agenda for your kickoff meetings

By Tom Mochal

Larry's second project for the legal department was to convert our document scanning software to a new vendor package. He had already completed a project definition and was ready to begin work, so I was somewhat surprised to receive a call from him this morning. After some pleasantries, I asked him what was up.

The dilemma

"I have a favor to ask," Larry said. "I know it is short notice, but can you attend a kickoff meeting in one hour?"

I was still curious as to what was going on. "I should be able to make it. Do you expect there to be problems? What do you want my role to be?"

"Actually, I know we talked in the past about using the standard processes and templates that have already been built," Larry explained. "However, I noticed that we don't have a really good standard agenda for a kickoff meeting. I would like you to look at my agenda and then see if it makes sense to adopt as a company standard."

I don't often receive offers from people to help create standard templates, so I was not going to say no. I attended the kickoff meeting with Larry and his legal clients. The meeting was structured as follows:

- **Introductions**: Most people knew each other, but there were a few new faces, including mine.
- **Project review**: Most people knew the general background of the project and why it was needed. Larry went a little further and also covered the scope, major deliverables to be produced, the risks and assumptions, and the estimated effort and duration. These were details about the project that most people were not aware of. There was some discussion about whether all of the appropriate deliverables were included, as well as the deadline for completion. This give-and-take was good, since Larry was trying to set expectations.

- **Roles and responsibilities**: This is an important area, since all of the people in the room had some role to play. In some cases, the clients themselves were not fully aware of the level of participation that would be required from them. Again, this entire discussion helped with establishing expectations for the project.
- **Project approach and overall timeline**: Larry used this time to describe, in general, how the project was organized and how it would be executed. He did not go through the actual workplan, since it was too low-level to provide a clear, overall picture.
- **Questions**: There was time remaining for any questions that were not covered in the discussion.
- **Recap/summary**: This was a good way to end the meeting. Larry recapped the discussion that took place. He also covered a few items that needed immediate action and noted who was responsible and when the resolution was due.

Mentor advice

I am usually called in to work on solutions for project managers' problems. Larry's situation provided me with a somewhat rare opportunity to watch a problem-free manager in action. Larry had obviously handled kickoff meetings before, and I think this one went very well. The agenda was good as well, and based on it, we'll be able to create a common agenda template for others to follow.

You should note that the agenda was basically set up to mirror the project definition document itself. The project review section was obviously from the project definition, since Larry discussed scope, risks, and assumptions. However, even the next two areas on roles and responsibilities and the approach and milestones are a part of our project definition template.

One of the big takeaways from this experience is to reinforce the project definition document as the key deliverable to ensure the project is well planned out. The kickoff meeting is a way to get all the participants and major stakeholders together to communicate what the project is about and to set expectations. Rather than just read the project definition, Larry built an agenda that reflected the definition and then presented the information in a discussion format.

Many people struggle with what to talk about at a kickoff meeting. But by building your agenda around your project definition, you can create a solid structure for this incredibly important first meeting. By doing so, you will cover the information that people need to know and establish the expectations that people should have going forward. This puts you in a great position to charge ahead.

Effective status meetings lead to successful projects

By Mike Sisco

One of the most valuable tools you have as a project manager is a weekly project status meeting. I approach any significant project by holding weekly project updates. These status meetings help:

- The new project members develop as a team.
- Me, as the project manager, identify weaknesses early enough to make corrections.
- Me, as the project manager, reinforce key points and provide early coaching.

An astute project manager uses a status meeting to go beyond simply learning about how the project is progressing. A good project manager already knows that before the meeting. The meeting is actually a tool to help the project manager move the project along and coach team members on key issues that can affect deliverables. I've found success with several simple tools and approaches in my work as a consultant.

Preparation

To be an effective project manager, prepare for every project status meeting by checking with each of your key project team members before the meeting. If you're managing the project correctly, you're in close contact with team members throughout the week, and there should be no surprises during the project status meeting. Surprises can undermine your ability to manage the project and cause team members to lose confidence in you.

I prepare in several ways:

- **Detail project review:** I walk through each of the tasks due to be completed within the next two to four weeks to determine the status of each. If I don't know, I find out, especially if it is a critical part of the project and affects other tasks. A detail walk-through will always generate questions or provide insight on the project's pressure points that you'll need to cover in the status meeting.
- **Identify the bottlenecks:** Part of my role is to be able to identify the project's bottlenecks and develop options to eliminate them. Remember that when you clear a bottleneck, other issues will become the project's new bottlenecks.
- **Prepare a list of key points:** I go into the meeting with a list of key points to discuss with the entire team or an individual. Lead by example. Your preparedness transfers over to the team and will reinforce the need for each member to be prepared for status meetings.

Schedule your status meeting for no longer than one hour. You can host separate sessions for specific issues apart from the entire team meeting. Always be conscious of how you're spending other people's time. All team members do not need to be involved in every aspect of the project.

People are always evaluating any leader's performance in organization, insight, understanding, action, decisiveness, thought processes, and leadership. Team members watch what's going on closely and take it to heart more than we think they do.

Following my standard project kickoff meeting, which sets the initial tone and establishes an immediate sense of organization, I use a standard status meeting agenda to reinforce organization and to give me ample opportunity to highlight important issues.

Consider these approaches when working with each agenda item.

Roll call

Let everyone know who is in attendance before starting. This is important for remote team members who have dialed in and will save you time later.

New business issues

You may have learned something during the week that affects the project. Share the news early in the meeting to help team members consider the issue as you walk through the project plan status session. Not every issue warrants spending time here, so keep discussions to a minimum.

Project plan status review

Walk through your project plan and allow each team member to provide a brief status of assignments due this week and tasks planned for the next two weeks. You want to know whether tasks are on track or if any will miss the projected deadline. You also want to allow the team member to share any special considerations that might affect other tasks or members of the project. Carefully manage this part because some team members will want to pontificate and spend more time than is really needed. Remember, you're the project manager.

Critical items

Upon completing the project status review session, summarize the critical items. This lets you reinforce the importance of focus members who have tasks associated with critical issues. It also gives you an opportunity to discuss possible options to help support team members and ensure the tasks are completed on schedule.

Q&A and discussion time

Always give your project team time to ask questions on issues that were not discussed. This gives you another opportunity to reinforce key points that you have picked up during the week's activities or that you discovered during the meeting. One of the strongest qualities of successful project managers is the ability to anticipate and know where the "fires" lie when they see "smoke" in project issues.

Summary and follow-up items

Always wrap up with a project status summary and a list of action items identified in the meeting to help move the project along.

Adjourn

Conclude the meeting with upbeat statements and positive input on project accomplishments. Always reinforce teamwork and encourage every member to watch out for one another to ensure the project is successful.

Follow every meeting with correspondence

I follow up each meeting with a quick correspondence that reviews important points of the status meeting and lists specific action items that were identified to support the project. For an example from a systems conversion project I handled, see **Figure A** on the page 15.

Key thoughts

Consider these key points when you're planning and holding your project status meetings:

- Start meetings on time.
- Know where the project pressure points are.
- Always know where the current bottlenecks are and how to clear them.
- If comments in the meeting indicate "smoke," it usually means there's fire.
- Use status meetings to help reinforce accountability.
- Critique the team as a whole. Reinforce individual team members in the meeting, but critique individuals in separate sessions.
- Keep meetings to one hour or less.
- Use separate sessions to solve big issues.
- Be aware of the team's productivity and time. Cover issues that aren't important for the entire team in separate sessions with those who need to be involved.

I've been surprised to discover years after a project that former employees picked up something in one of my project meetings that helped in their career. Remember that people watch how project managers lead projects closely, and your leadership affects the work and success of the team. Prepare accordingly, and you can establish an environment in which your entire project will be a success.

Canton-Stolis Migration Project

Project Status Meeting Follow-up - 7/31/06
Following is a list of issues and follow-up actions discussed in our conference call today:

1. Equipment inventory consists of:
9 total workstations

7 486 PCs running Windows 3.12

1 laptop (Eileen Burkhart)

1 Pentium III PC running Windows 98

There is a need for 10 total workstations. Cabling is CAT-5, and there are sufficient drops for all 10 workstations. The following options must be resolved:
A. Ability to use the existing 486 PCs or purchase new PCs
B. Purchase 2 new desktop PCs
Replace Eileen's laptop
Add one more workstation (cabling is in place)
Novell local area network server running 4.11 operating system
8 printers
6 Okidata Microline 320 (used for local PC printing only, not networked)
2 HP Laser-4s (networked through a PC)
2 PCs are used for dial-out capability (Internet access). This function will be replaced once they are on our network.

2. Mike Sisco to follow up with Stolis to determine options and cost of converting three files:

Payor File

Employer File

Protocol File

3. Four users will need e-mail, Microsoft Office, and access to the Internet from our network:

Eileen Burkhart, center manager

Nancy Backer

Jennifer Morgan

Beth Bugh

4. Special AS/400 functionality has been defined as:

A. Dial-in inquiry on Employer protocols for their ER liaison. (A conference call has been scheduled for 9/19/00 to go over a recommended approach.)

B. Reference book of Employer protocol information for "on-call" staff. (A copy will be sent to Meg Murray to evaluate the feasibility of creating it.)

C. Drug Screen Summary Report and Employer Log (Meg Murray to work through the detail requirements and arrive at a business approach to provide this capability).

5. Preprinted forms
Eileen and her staff to follow up with Mary Kondic to determine what has to be ordered and will submit an order to Tim McKeon.

6. Marketing report
Eileen and her staff will follow up with Mary Kondic to determine usability of what already exists on the AS/400.

7. Neurometer testing
A stand-alone program exists to enter data and create a report for neurometer testing. This software will need to be maintained on the existing PC or loaded onto another in order to continue to provide this capability.

8. Updates
A transcription service currently dials into the Stolis system to update information. This capability will not be available on the AS/400.

9. Accounts receivable
The A/R detail will not be converted; the Canton staff will work out the A/R and will cancel Stolis support at the appropriate time.

Nick Anthony (777-777-7777) is the contact for hardware questions.

Figure A

Use this action item log to keep project team meetings on task

By Tom Mochal

How many times has this happened to you? You attend a meeting where members of a project team have enthusiastically volunteered to complete a variety of assignments. Then, a week later at a follow-up meeting, only a few team members have completed their assignments—and others can't even remember the task they were assigned to complete.

This action item log will help managers keep track of tasks and the team members who are responsible for completing them. This form is designed with project managers in mind, but anyone who wants to keep tabs on tasks will benefit from using this simple document.

How it works

The action item form contains a summary of all the action items that come up during the life of the project. Action items typically arise as follow-up work from meetings. However, you may want to include less formal assignments—perhaps a conversation in the hallway resulted in a team member volunteering to complete a task, and you want to make sure that you follow up.

One of the biggest benefits of using this log is that it requires you to assign a task and due date to a particular person. At some organizations, these action item logs are e-mailed to everyone at the conclusion of each meeting to serve as a reminder to team members to complete their assigned tasks. At future meetings, the manager might begin the session by updating the status of each action item, an easy way to hold the team accountable.

The log should contain enough information to ensure that each action item is listed, but avoid adding so much detail that scanning the list becomes difficult. To maintain readability, make sure that the information can fit across a single sheet of paper or can be displayed in a single window.

A real-life example

I used this action item log at a weekly meeting I've been attending with five other management peers. We fell into the typical routine where we discussed ideas and assigned tasks, but we were disappointed with our progress when we lost track of those assigned tasks.

The solution was to religiously use an action item log. Every other week, time was allocated at the beginning of the meeting for a status update on action items and to see whether the items were completed as scheduled. Closed items were moved to the bottom of the log so that we could focus on the open ones.

Sometimes, the date commitments could not be met. When that happened, the responsible person recommitted to a new end date. If a second deadline was missed, the team questioned whether the action item was really important after all. If not, the item was deleted from the list.

Using the action item log helped maintain focus on the important work we wanted to accomplish. It also helped build a culture where team members know they'll be held accountable for meeting commitments made to other team members.

An alternative

The action item log is an optional technique used to manage action items and ensure they are completed. An alternative technique is to place the work action items directly into the work plan, along with person assigned and due date. In this scenario, the action item and the person assigned to it can be managed from the work plan without the need to maintain a separate document.

Action item log

Item #	Description	Priority	Date reported	Assigned to	Due date	Status	Resolution/Comments
1	Set up a meeting with hardware vendor to discuss pricing of upgrading equipment.	M	7/20/06	Thornton	8/06/06	Closed	Meeting held on 8/2/06
2	Update the Communication Plan to reflect the new monthly meeting we're having with the Marketing and Sales Departments.	M	7/28/06	Smith	8/10/06	Closed	The Communication Plan was updated and placed into the project library. All stakeholders have been notified of the change.
3	Talk to the graphic arts department about changing the colors on our project logo. Bring estimate of cost and effort to the next status meeting.	H	7/30/06	Thornton	8/10/06	InProg	A meeting is scheduled for 8/4/06

Conclusion meetings can provide lessons for your next project

By Tom Mochal

Although termination activities may seem like a low priority when developing a project workplan, they should be viewed as vital components of a project, not as an afterthought as the team disbands.

Some of the activities to consider at the end of a project include:

- Declaring success or failure
- Transitioning the solution to support
- Archiving the project files
- Conducting performance reviews
- Reassigning the remaining project team members
- Holding a project conclusion meeting

A project conclusion meeting is an opportunity to reflect on the project and examine what can be learned that will help the team members and other project teams in the future. Here’s how you might structure one.

The project conclusion meeting

Just as you would begin your project with a formal kickoff meeting to signify that the initiative has officially started, the project should officially end with a project conclusion meeting. If the project had major problems, or if the project was cancelled, sometimes these are called project post-mortems. There is value to be gained from this meeting, whether the project was a success, a failure, or something in between.

You can plan the meeting in a number of ways so that it is as effective as possible. To make for a better meeting, you may choose to:

- **Use an outside facilitator**. Many times, the group is more comfortable if there is a meeting facilitator from outside the team. This is especially true if the project experienced problems. You can get a more truthful discussion if the facilitator doesn’t have a stake in the outcome.
- **Make sure everyone knows the purpose of the meeting**. This can be communicated clearly ahead of time to all of the participants.
- **Send out an agenda ahead of time**. Your time will be better spent if everyone is prepared ahead of time and knows the discussion topics.

Everyone needs to understand that team members are there to learn both individually and collectively. Don’t treat this meeting like a performance review. All participants need to feel safe to expose what they did and thought so that they can learn how to be more effective.

Focus on what happened vs. what was expected

You won’t discover what to improve unless you know what you achieved vs. what you originally wanted. First, have a frank discussion to list the things that should have happened on the project. For each goal, add a corresponding statement regarding what actually happened. You’re not only looking for problems. If important events actually happened as planned, note them as well.

If the project had problems, it’s easy for the discussion to turn negative. Try to keep the discussion positive. If different people have differing views of what happened on the project, try to find common ground for consensus. Remember that there is not necessarily a right or wrong. You’re trying to gather perceptions. It will help if people focus on the activities they actually participated in, rather than guessing about those in which they were not involved.

Ask why

After you list what actually happened on the project, prioritize a smaller number of important areas to focus on. For each of the remaining items, start asking why things turned out as they did. Again, in some cases, you may be focusing on areas that didn't turn out as you expected.

I remember applying this process on a project in which the major deliverable was supposed to be completed in four months but it took nine. That was obviously not what was expected. After a series of "why" questions, numerous lessons were learned, including these:

- The programmer didn't do a good job of capturing requirements, so there was a lot of rework once the initial deliverables were shown to the client.
- The client sponsor insisted that the deliverables be close to "perfect" before being released. The team agreed afterward that the better approach would have been to implement the solution much earlier with 80 percent of the required features rather than waiting for nine months before the "perfect" solution was ready.
- The client had a hard time focusing on the work, and could only spend time on testing every three or four weeks. If changes were required after one set of tests, it might take three weeks for the client to retest.
- The programmers did a poor job estimating the work. Whenever the client wanted a change, the programmers would say "no problem" and then it would take them a long time to implement the changes.

This was not the first time these problems occurred on a project. However, it seems sometimes you need to experience them for yourself before the lessons really sink in.

Lessons learned for future projects

To be effective, the discussion next needs to be translated into general observations and key lessons that the group can use as guidelines for the future. Although the unique set of circumstances that caused events to happen as they did on your project may not occur again on any particular problem, the team should be able to generalize what happened on this project into a set of lessons that can be applied to many projects in the future. These lessons learned should be documented formally and distributed to all team members. If you have a group (such as a PMO) that keeps a repository of project lessons learned, these insights should be forwarded there as well.

As lessons learned, the insights are of most interest to the project participants and to others who embark on similar projects in the future. As the PMO receives many sets of lessons learned, the PMO may also be able to come up with a smaller list of organizational best practices that will be of help to all projects in the future.

Summary

The end-of-project meeting is a great opportunity to formally wrap up a project. In addition to signaling that the project is completed, it's also a time to see what lessons can be learned for the future. You don't want to discuss lessons learned right away. Instead, describe what you wanted to happen, what actually happened, and why. Then you'll have the context to start talking about what lessons you can take forward.

The project team can internalize the lessons learned and apply them to future projects. The lessons learned from all projects can also be consolidated on an organization level to develop a smaller number of best practices that can be applied to all projects. This allows the entire organization to take advantage of these common lessons.

Additional resources

- TechRepublic's **Downloads RSS Feed** XML
- Sign up for our Downloads Weekly Update newsletter
- Sign up for our Project Management Newsletter
- Check out all of TechRepublic's free newsletters
- "Okay, enough with the 'meetings are toxic' crap" (TechRepublic blog)
- "How to prevent a negative end-of-project meeting" (TechRepublic article)
- "Use time wisely with effective meeting management" (TechRepublic article)

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