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Effective Meeting Management

by Charles R. Haskins

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We all know how to manage and attend meetings: distribute an agenda, start on time, actively participate, take minutes, follow-up — no problem. Actuaries with managerial duties spend more than 25% of their time in meetings, with upper level managers spending more than 40% of their work day in meetings. The average professional spends 21 work weeks a year in meetings, six weeks of which are largely a waste of time or are actually counterproductive.

Too often we get trapped into a weekly meeting routine, "I meet — therefore I am." We forget that, as George Kieffer notes in *The Strategy of Meetings*, "It is not the quantity of meetings that will get you to the top. It's the perceived quality of those meetings, who attends them, and what you are able to accomplish."

We owe it to ourselves to avoid nonessential meetings or to find other methods, such as voice mail, e-mail, and conference calls to handle minor issues. We should aggressively work to limit routine meetings so we can concentrate our energies on priority assignments and meetings.

For many of us, a meeting is the most important avenue we have for interacting with executives within our company or with clients. We should treat each meeting as a means to showcase our analytical, managerial, and leadership skills.

In the meeting environment, we achieve our objectives when the best decision is made or when we avoid decisions that have no chance of success.

Reaching the correct decision in a group setting takes preparation and active participation by all attendees.

Meeting Checklist

Keep these checkpoints in mind to help you increase your mastery of meetings.

Whether to call or attend a meeting:

- ✓ Focus on what you want to accomplish by the end of the meeting.
- ✓ Justify that the meeting is the best use of your time and time of others.
- ✓ Calculate the cost of the meeting to the organization.
- ✓ Scrutinize any meeting held more than once a month.
- ✓ Consider voice mail, e-mail, conference calls, or brief encounters instead of a meeting.
- ✓ Consider sending a representative in your place.
- ✓ Ask the chairperson if you may attend only a portion of the meeting. Consider staggered attendance if you are calling a meeting.
- ✓ Combine meetings with parallel or overlapping functions into one.

If you must call or attend a meeting:

- ✓ Be sure you and your meeting partners are clear on the stated goal and type of meeting (information, problem-solving, creative, policy, training, recurring task, or general).
- ✓ Establish a specific standard by which you will measure success or failure.
- ✓ Assess your basic relationship to your meeting partner or partners: superior, peer, or subordinate. Evaluate their likely personal interests and needs, and determine what your personal objective is with each participant and the group as a whole.



- ✓ Reduce the number of people to only those necessary to accomplish the goal. Often, others might be content just to receive minutes.
- ✓ Reduce the number of issues and tasks to only those necessary to accomplish the goal.
- ✓ Establish a meeting environment (style, location, room size, and seating) consistent with your goal. Your office is an ideal location for small meetings, because you feel more comfortable, can control access to the phone, and can be the gracious host. The major advantage in selecting your colleague's office is that you can leave on your schedule.
- ✓ Consult in advance with any participant or others whose cooperation is necessary to meet the goal.
- ✓ Consider scheduling meetings at odd times (9:10 to 9:35) to achieve prompt attendance.
- ✓ Circulate a detailed agenda and written materials in advance. The agenda should have a start and stop time noted with time limits for each topic according to priority.
- ✓ Draft the agenda with minutes in mind.
- ✓ Make sure your key item is early on the agenda, but not first, because the group will focus too much attention on it, and will be overly

- critical of it. Have allies ready to speak on your items.
- ✓ Form a tentative judgment on all issues.
- ✓ Count the votes for issues critical to you (if a vote must be taken).

At the meeting

- ✓ If you are leading, prevent interruptions (no phone calls or messages other than emergencies).
- ✓ Arrive early and make contact with key players.
- ✓ Conduct a “stand-up” meeting when the agenda is short.

- ✓ Separate the problems discussed from the people discussing them.
- ✓ If leading, at the end of the allotted time for a topic, summarize decisions, actions steps, individuals responsible, and deadlines, and have them recorded.
- ✓ Whether you’re winning or losing your point, know when to quit.
- ✓ Look for every opportunity to show courtesy and respect. Be as tactful as possible when asking questions on any topic.
- ✓ Summarize what was accomplished

- work on assignments and to build a “buy-in” of your conclusions.
- ✓ Capitalize on gains and recoup losses by follow-up memos and brief encounters as necessary.

This meeting checklist is from the Kieffer book, with additions from the following books:

- *The Little Black Book of Business Meetings* by Michael C. Thomsett
- *We’ve Got to Start Meeting Like This! A Guide to Successful Business Management* by Roger K. Mosvick and Robert B. Nelson
- *How to Make Meetings Work: The New Interaction Method* by Michael Doyle and David Straus
- *Time for Success: A Goal Getter’s Strategy* by R. Alec Mackenzie
- *What They Don’t Teach You at Harvard Business School: Notes from a Street-Smart Executive* by Mark H. McCormack

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- ✓ Find the control positions at the table (ends of conference tables are best, with corners being second best).
- ✓ Make sure someone takes notes and keeps time.
- ✓ If you are leading, start on time, state the purpose, and estimate the time for completion. Restate the purpose periodically.
- ✓ As the leader, separate facts from beliefs, look for emotional build-ups, seek contributions from all, clarify agreement and disagreement, make people feel important, and protect the integrity of the group and individual members.
- ✓ As a participant, contribute early, and often — but thoughtfully.
- ✓ Divide big problems into sub-problems, and address them separately whenever possible. Seek multiple solutions outside the meeting. Don’t force a choice until analysis is complete.

- in a positive way, and make people feel good about their attendance.
- ✓ Set the date and place for the next meeting and briefly outline the agenda. Get in the habit of taking your appointment calendar to meetings.

After the meeting

- ✓ Finish the minutes quickly, including any decisions, names of individuals responsible, and deadlines. Distribute them within 48 hours.
- ✓ Minutes should not be a transcript. They should include only date and time, attendees, agenda topics discussed, definition of problems, alternatives presented, solutions agreed on, assignments made and accepted, deadlines, and follow-up actions.
- ✓ Share the results with people who need to know, including those who have helped you prepare.
- ✓ Follow up assignments quickly. Use a team approach where possible to

The late Charles R. Haskins was executive vice president of product management, Family Guardian Life Insurance Company in St. Louis, Mo. at the time he wrote this article.