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## **POWERFUL PRODUCTIVE & INCLUSIVE MEETINGS**

City of Boise EnergizED Workshop Series

Shannon Rush-Call, Co-Founder Strelo Group  
Spring 2021

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Open your **camera icon** on your phone and scan this QR code

Or, go to **slido.com** (on your phone, in a browser on your PC) and enter this event code: **#EnergizEDMeet**

Or, open the Slido app and enter event code: **#EnergizEDMeet**

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*meetings. change. impact.*

A large, vibrant red scribble graphic that resembles a tangled knot or a series of overlapping loops, framing the text on the right side of the image.

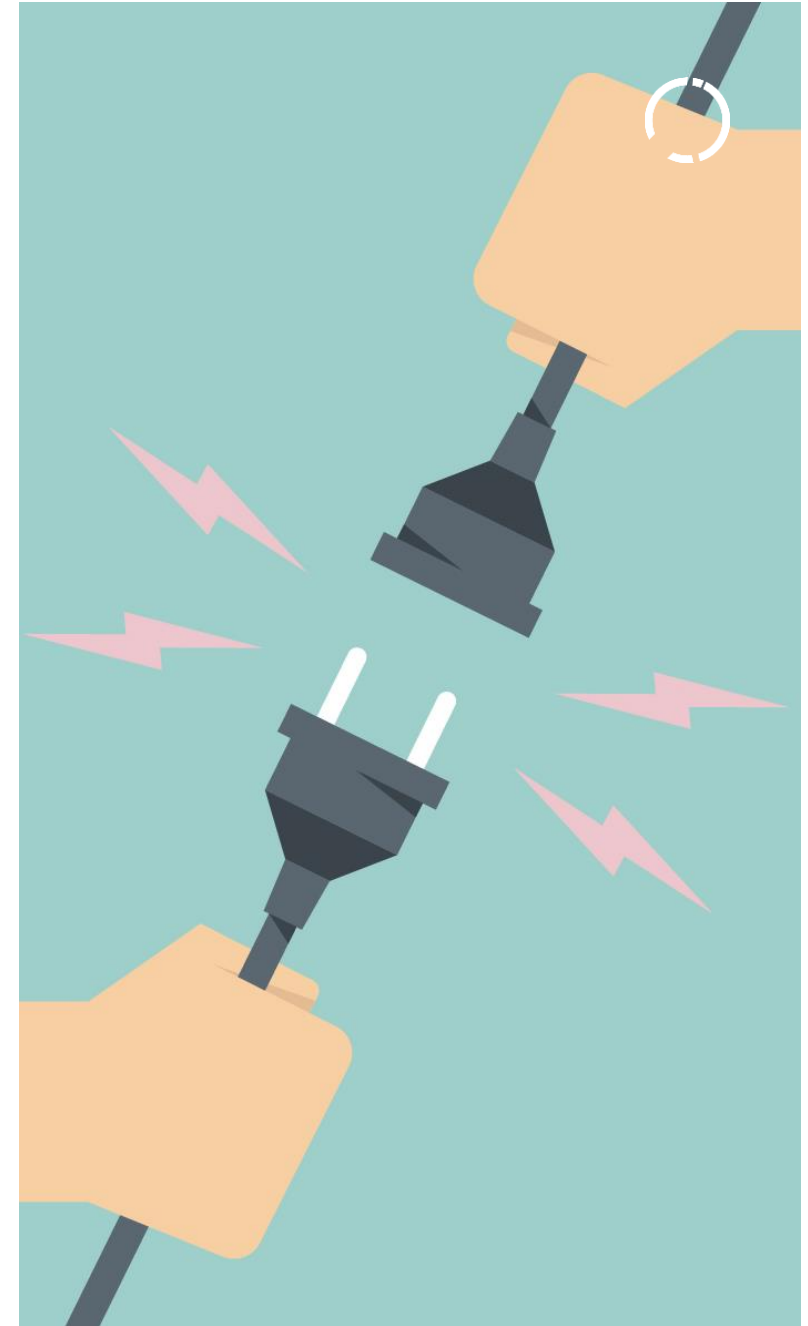
What we practice at  
the small scale sets  
the patterns for the  
whole system.

-adrienne maree brown  
Emergent Strategy



## INCLUSION, CHANGE & MEETINGS – HOW THEY ARE RELATED

- Meetings are the primary vehicle where real-time problem solving & work gets done
- Meetings are where relationships are built
- Meetings are the microcosms of our organizational culture
- Meetings should embody & operationalize inclusion – mindsets, goals, approaches





What's your definition of a "meeting"

 Start presenting to display the poll results on this slide.





### OUR DEFINITION

Two or more  
people endeavor  
to accomplish  
**something meaningful**  
in real time.



What are my top pet-peeves (frustrations, disappointments or irritants) I have with meetings?

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# FIVE “W’S” OF POWERFUL AND PRODUCTIVE MEETINGS

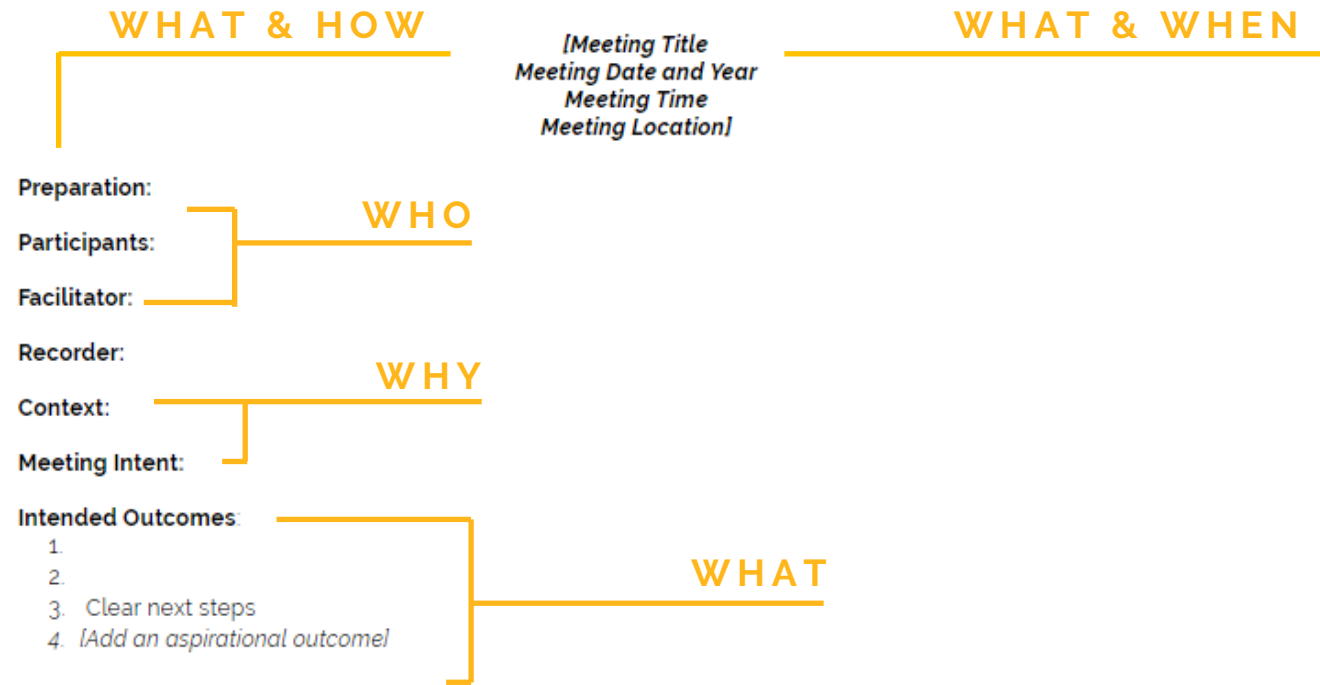


<i>what</i>	<i>how</i>	<i>who</i>	<i>why</i>	<i>when</i>
What do we want to accomplish?	How should we engage in the meeting topics?	Who is supposed to do what (before, during and after?)	Why are we talking about this?	When will we transition from each topic to cover all the topics?

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*a shared approach.*

THE MEETING PLAN TEMPLATE



<b>WHEN WHAT</b>		<b>HOW</b>	<b>WHO</b>
Agenda:			
Time/When	Topic/What	Process/How	Topic Leader /Who
1:55 pm (5 min)	Early Arrival	Arrival early, settle in	[Who]
2:00 pm (5 min)	Check In	Council: <i>[add prompt]</i>	[Who]
2:05 pm (5 min)	Review meeting design	1. Present/review meeting design 2. Get questions or upgrades	[Who]
2:15 pm (10 min)	<i>Topic of Intended Outcome 1</i>	1. [Process step] 2. [Process step] 3. [Process step]	[Who]

## THE MEETING PLAN TEMPLATE

Developing a shared language, approach and culture

## USE WHAT YOU NEED (LEAVE THE REST)



*consider  
your setting*

Is it formal or informal?  
Are the stakes high or not?



*consider  
your audience*

Do they know each other?  
Do they work well together?  
How many people?



**QUESTIONS?**

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what:  
intended outcomes

# FIVE “W’S” OF POWERFUL AND PRODUCTIVE MEETINGS



<i>what</i>	<i>how</i>	<i>who</i>	<i>why</i>	<i>when</i>
What do we want to accomplish?	How should we engage in the meeting topics?	Who is supposed to do what (before, during and after?)	Why are we talking about this?	When will we transition from each topic to cover all the topics?



## WHAT: INTENDED OUTCOMES

A **goal** or **end state** to be achieved as a result of a particular section of a meeting.

Not activities or topics!



## INTENDED OUTCOME EXAMPLES



*bad*



*better*

---

Review action items

Shared understanding of actions  
resulting from last meeting

---

Discuss upcoming event

A list of possible venues  
for our next event

---

Status update

Alignment around the current  
status of our project

# SIX CATEGORIES OF ACTIONS THAT INFORM INTENDED OUTCOMES

1.

**SHARE**  
*information*

2.

**OBTAIN**  
*input*

3.

**ADVANCE**  
*thinking*

4.

**MAKE**  
*decision*

5.

**OBTAIN**  
*action*

6.

**BUILD**  
*community*

*Based on Kaner. Facilitator's guide to participatory decision making. Jossey-Boss. 2014*

# CATEGORIES OF INTENDED OUTCOMES



SHARE <i>information</i>	OBTAIN <i>input</i>	ADVANCE <i>thinking</i>	MAKE <i>decision</i>	OBTAIN <i>action</i>	BUILD <i>community</i>
USELESS					
Fundraising Event	Fundraising Event	Fundraising Event	Fundraising Event	Fundraising Event	Fundraising Event
USEFUL (OUTCOME BASED)					
Clarity around current status of our fundraising plans	A list of speakers and activities for upcoming fundraising event	Increased understanding of what we will do better this year vs. last year	Alignment around the time and date for the fundraising event	A list of clear next steps with point persons and deadlines	Increased commitment towards having the most successful fundraising event ever



# Intended Outcomes

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# INTENDED OUTCOME THOUGHT EXERCISE - STEPS



*old*



*new*

1. Old Intended Outcome Category

3. New Intended Outcome Category

2. Articulate the old outcome

4. Articulate the new outcome

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In a few words, my reflections on my experience with this skill are...

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**QUESTIONS?**

# FIVE “W’S” OF POWERFUL AND PRODUCTIVE MEETINGS



<i>what</i>	<i>how</i>	<i>who</i>	<i>why</i>	<i>when</i>
What do we want to accomplish?	How should we engage in the meeting topics?	Who is supposed to do what (before, during and after?)	Why are we talking about this?	When will we transition from each topic to cover all the topics?

# FIVE “W’S” OF POWERFUL AND PRODUCTIVE MEETINGS



<i>what</i>	<i>how</i>	<i>who</i>	<i>why</i>	<i>when</i>
What do we want to accomplish?	How should we engage in the meeting topics?	Who is supposed to do what (before, during and after?)	Why are we talking about this?	When will we transition from each topic to cover all the topics?

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how:  
content and process

## MEETING OUTCOMES & PROCESS STEPS

Each intended outcome must be supported by accompanying processes and content

### CONTENT

The **what** – the “thing” we are working on

### PROCESS

The **how** - **how** we will engage with the **what**



# INTENDED OUTCOMES SUPPORTED BY CONTENT & PROCESS



SHARE <i>information</i>	OBTAIN <i>input</i>	ADVANCE <i>thinking</i>	MAKE <i>decision</i>	OBTAIN <i>action</i>	BUILD <i>Community</i>
INTENDED OUTCOMES					
Clarity around current status of our fundraising plans	A list of speakers and activities for upcoming fundraising event	Increased understanding of what we will do better this year vs. last year	Alignment around the time and date for the fundraising event	A list of clear next steps with point persons and deadlines	Increased commitment towards having the most successful fundraising event ever
CONTENT & PROCESS					

# INTENDED OUTCOMES SUPPORTED BY CONTENT & PROCESS



**SHARE**  
*information*

## INTENDED OUTCOMES

Clarity around current  
status of our  
fundraising plans

## CONTENT & PROCESS

### CONTENT

Sub-Team Status Reports

### PROCESS

1. Sub-Team Lead presents status report
2. Questions & answers
3. Dialogue to align on any open issues

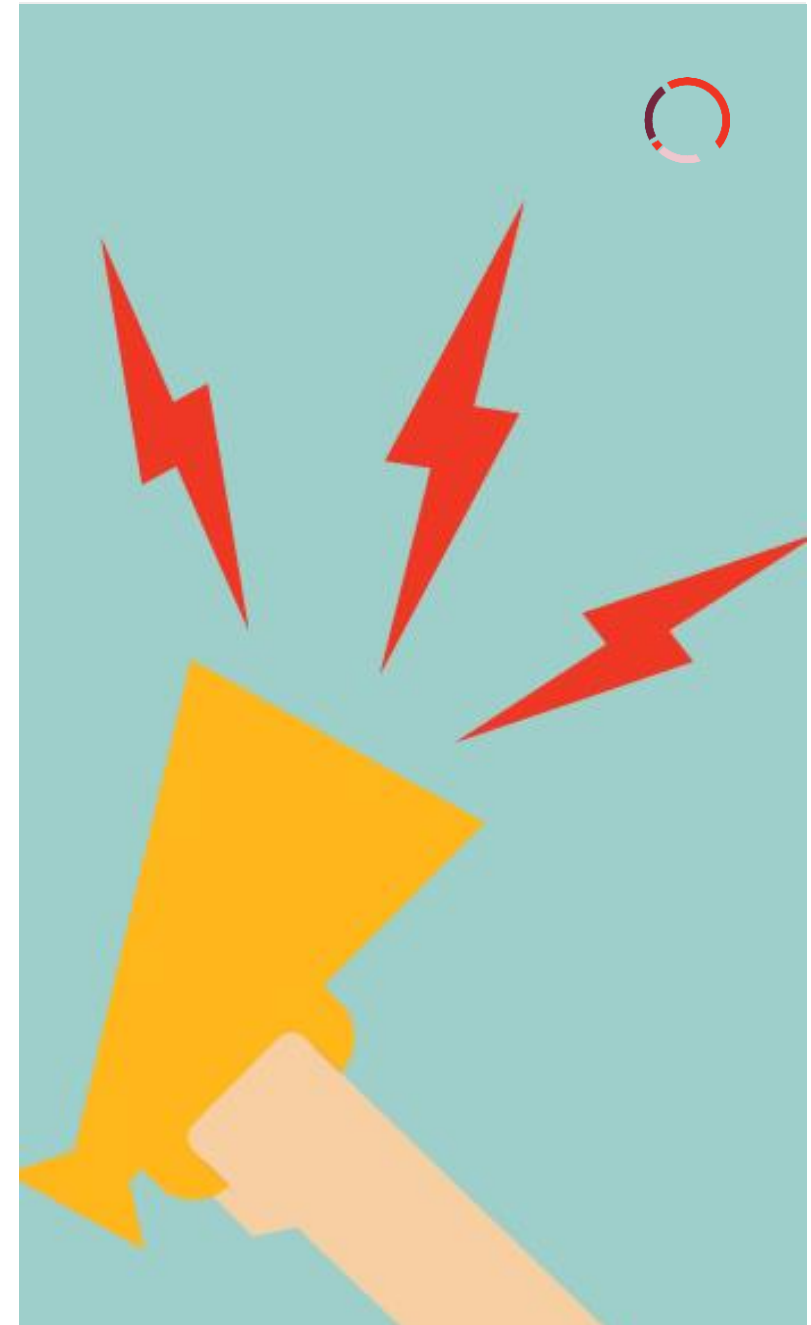
\*Repeat process for each Sub-Team



# THE TYRANNY OF IMPLICIT (NON-INCLUSIVE) PROCESSES

HAVE YOU EVER WONDERED...

- What are we doing?
- When do I get to ask a question?
- How can we get the best ideas on the table?
- How can we narrow down our options?
- Are we going to accomplish anything?
- When will this person stop talking?





## THE BENEFITS OF EXPLICIT PROCESSES

- Enables our egos to (subconsciously) relax
- Builds psychological safety
- Enables real-time problem-solving, creativity, and innovation

## CONSIDERATIONS WHEN DESIGNING PROCESSES

- Your intended outcomes
- Number and diversity of participants
- Inherent complexity of the content
- Stakes of the meeting
- Your digital and physical space



# PROCESSES OF COMMUNICATION - ME TO WE



*me*

*we*

PROCESS

---

TELL/YELL

ARGUE

ADVOCATE

COUNCIL

DIALOGUE

---

# DESIGNING MEETING PROCESSES - FINAL TAKEAWAYS



Use just enough  
process to  
achieve your  
intended  
outcome



Process design  
is both a science  
and an art



Process design  
gets easier  
with practice



Process design  
is worth it



How might having more explicit and inclusive meeting processes impact my level of engagement and participation in meetings?

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**QUESTIONS?**



# A FEW INCLUSIVE MEETING ELEMENTS FROM TODAY



Meeting Plan	4W Agenda	Intended Outcomes	Explicit processes
Council process	Polls	Check-in	Check-out

## RULES OF THUMB FOR PLANNING

- Outcomes drive the process steps
- Visualize the meeting unfolding in your mind
- Anticipate what can go wrong
- Give yourself at least 50% of the time of the meeting duration to plan for a productive meeting



A group of people are in a meeting room. A man in a grey shirt is standing and pointing at a whiteboard. Several people are seated around a table, looking at the whiteboard. A large, red, hand-drawn scribble is overlaid on the center of the image, containing the text. In the top right corner, there is a small white circular icon with a dot in the center.

All meetings are  
planned, most are  
planned poorly.  
Even when you don't  
plan a meeting,  
that's still a plan.

**J. CHU**

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*the power that comes from combining strength with love*



Which element(s) do you commit to practicing in order to create more powerful & inclusive meetings?

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*thank you*