POWERFUL PRODUCTIVE & INCLUSIVE MEETINGS

City of Boise EnergizED Workshop Series

Shannon Rush-Call, Co-Founder Strelo Group
Spring 2021
Open your **camera icon** on your phone and scan this QR code

Or, go to [slido.com](http://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**
meetings. change. impact.
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"
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?
<table>
<thead>
<tr>
<th><strong>what</strong></th>
<th><strong>how</strong></th>
<th><strong>who</strong></th>
<th><strong>why</strong></th>
<th><strong>when</strong></th>
</tr>
</thead>
<tbody>
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<td>How should we engage in the meeting topics?</td>
<td>Who is supposed to do what (before, during and after?)</td>
<td>Why are we talking about this?</td>
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a shared approach.

THE MEETING PLAN TEMPLATE
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?
what: intended outcomes
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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!
<table>
<thead>
<tr>
<th>bad</th>
<th>better</th>
</tr>
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<tbody>
<tr>
<td>Review action items</td>
<td>Shared understanding of actions resulting from last meeting</td>
</tr>
<tr>
<td>Discuss upcoming event</td>
<td>A list of possible venues for our next event</td>
</tr>
<tr>
<td>Status update</td>
<td>Alignment around the current status of our project</td>
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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

<table>
<thead>
<tr>
<th>Share Information</th>
<th>Obtain Input</th>
<th>Advance Thinking</th>
<th>Make Decision</th>
<th>Obtain Action</th>
<th>Build Community</th>
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<tr>
<td><strong>Useless</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Fundraising Event</td>
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<tr>
<td><strong>Useful (Outcome Based)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clarity around current status of our fundraising plans</td>
<td>A list of speakers and activities for upcoming fundraising event</td>
<td>Increased understanding of what we will do better this year vs. last year</td>
<td>Alignment around the time and date for the fundraising event</td>
<td>A list of clear next steps with point persons and deadlines</td>
<td>Increased commitment towards having the most successful fundraising event ever</td>
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Intended Outcomes

Start presenting to display the poll results on this slide.
INTENDED OUTCOME THOUGHT EXERCISE - STEPS

1. Old Intended Outcome Category
2. Articulate the old outcome
3. New Intended Outcome Category
4. Articulate the new outcome
In a few words, my reflections on my experience with this skill are...
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## FIVE “W’S” OF POWERFUL AND PRODUCTIVE MEETINGS

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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

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### 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

DESIGNING PROCESS TAKES INTENTION
Start with intended outcomes in mind - Outcomes always drive the process

DESIGNING PROCESS TAKES VISUALIZATION
Visualize the meeting topic unfolding to think through process design
PROCESSES OF COMMUNICATION - ME TO WE

TELL/YELL  ARGUE  ADVOCATE  COUNCIL  DIALOGUE
<table>
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<th>Designing Meeting Processes - Final Takeaways</th>
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<tr>
<td>Use just enough process to achieve your intended outcome</td>
</tr>
<tr>
<td>Process design is both a science and an art</td>
</tr>
<tr>
<td>Process design gets easier with practice</td>
</tr>
<tr>
<td>Process design is worth it</td>
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</table>
How might having more explicit and inclusive meeting processes impact my level of engagement and participation in meetings?
QUESTIONS?
### A FEW INCLUSIVE MEETING ELEMENTS FROM TODAY

<table>
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<tr>
<th>Meeting Plan</th>
<th>4W Agenda</th>
<th>Intended Outcomes</th>
<th>Explicit processes</th>
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<tr>
<td>Council process</td>
<td>Polls</td>
<td>Check-in</td>
<td>Check-out</td>
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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

If you think you don’t have time to plan…

Do you have time for the meeting go off the rails, chase people around, or put out fires after the meeting is over?
All meetings are planned, most are planned poorly.
Even when you don’t plan a meeting, that’s still a plan.

J. CHU
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?
thank you