

# Planning and Leading Effective Meetings



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DISCUSSION AND REVIEW PAPER



## Planning and Leading Effective Meetings

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### Abstract

Behavior analysts spend a great deal of time in meetings regardless of their specific professional role (e.g., academic, practice, administration), so effective meeting skills are important. Meetings can serve a variety of important purposes if they are planned and led well. However, many people are not explicitly taught how to plan or lead meetings effectively. The purpose of this paper is to describe the common purposes of meetings and to provide recommendations and tools for planning and leading effective meetings.

**Keywords** Agenda · Meeting · Meeting facilitation · Meeting planning · Meeting effectiveness · Professional skills



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Fried (2010): “toxic, terrible, poisonous things” . . . that interrupt worker productivity.



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*"I know we didn't accomplish anything, but that's what meetings are for."*

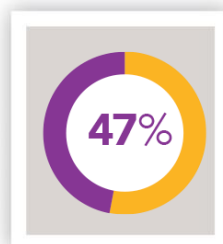


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- In surveys of helping professions:
- ~47% of the day is spent in meetings (Bureau of Labor Statistics, 2017)



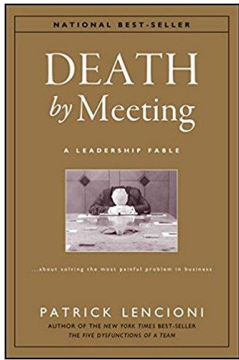
Grady (2013): “a global epidemic of bad, inefficient, overcrowded meetings is plaguing the world’s businesses.”



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**Leach, Rogelberg, Warr and Burnfield (2009)**



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- Characteristics of a “good meeting”:
  - 1) use of an agenda,
  - 2) keeping of minutes,
  - 3) punctuality,
  - 4) appropriate meeting environment,
  - 5) having a meeting leader.



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**Purpose/Objectives**



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**Do you really need a meeting?**



- Purpose/objectives of the meeting
  - Do you have a clear agenda suited to the structure?
  - Can this be accomplished another way?
  - Are these the right people and only the right people?



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**Purposes of a Meeting**



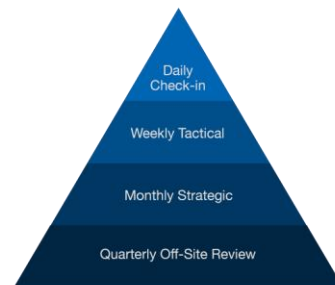
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- **Communication**
  - Notification and messaging
  - Complex questions
  - Discussion prior to decision
- **Problem Solving**
  - Detection and analysis
  - Brainstorming and evaluation
  - Implementation planning
- **Performance management**
  - Deadlines and accountability
  - Supervision and support
  - Oversight of work quality
  - Management of barriers
- **Project management**
  - Project planning
  - Group deadlines and public accountability
  - Generating and refining work products

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Lencioni's Model for Meetings



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## Functions of a Meeting



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- Social connection and support
- Observation and data collection
- Reinforcement!
- Specific instruction and training
- Motivation (e.g., deadline)
- Collaboration and creativity

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## Effective Meetings



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- Plan the meeting in advance
- Meeting owner manages the meeting
- Meeting attendees manage themselves and contribute



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## Planning the meeting



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- Do I need a meeting and do I have the right people?
  - Are roles clearly specified?
  - Who owns the meeting?
- Plan and distribute the agenda in advance
  - Task assignments
  - Specific order of content
  - Estimated timing
  - 25 mins/50 mins – NOT THE FULL HALF OR HOUR!



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### Appendix : Agenda for Initial Supervision Session

Estimated Duration: 1.5 hour

- I. Welcome to the Experience! Let's get to know each other (15 to 30 minutes)
  1. Discuss importance of understanding one another, our ways of communicating, our reinforcers and our priorities
  2. My background and experience as a supervisor, my life, interests and guiding values
  3. Your background and experiences, your life, interests and guiding values
- II. Contract Review and Questions (20 to 30 minutes)
- III. How to Create an Agenda for Supervision (5 minutes)
- IV. Review of how to complete the Collaboration Activity (5 minutes)
- V. Overview of documentation and storage (5 minutes)
- VI. Planning for next contact (5 minutes)
  1. Set the appointment
  2. Assist supervisee with planning to meet the following objectives
    - i. Complete the Collaboration Tool to Review Next Time
    - ii. Reminder to bring documentation and review materials
    - iii. Send a draft agenda for next week 48 hours in advance – indicate that you would like to add an item to that agenda on the role of feedback with a time estimate of about 5 minutes



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## Planning the meeting



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- Platform and materials
  - What will you need and where will the meeting occur
- Scheduling the meeting
  - NO EMERGENCY MEETINGS!
  - Select optimal time for effective participation and minimal impact on productivity
  - Standing meetings or at least 1-5 days notice



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Purpose(s): Goals of the meeting (Select all that apply.)	
<input type="checkbox"/> Supervision and performance management	<input type="checkbox"/> Unstated purposes and strategies
<input type="checkbox"/> Communication	<input type="checkbox"/> Setting deadlines
<input type="checkbox"/> Problem solving	<input type="checkbox"/> Observing interpersonal interactions
<input type="checkbox"/> Project management and product generation	<input type="checkbox"/> Providing feedback
<input type="checkbox"/> Other:	<input type="checkbox"/> Modeline interpersonal skills
Frequency	Platform, Environment, and Equipment (Select all that apply.)
<input type="checkbox"/> One time	<input type="checkbox"/> In person
<input type="checkbox"/> Recurring	<input type="checkbox"/> Projector
<input type="checkbox"/> Unsure (Revisit after meeting.)	<input type="checkbox"/> Whiteboard
	<input type="checkbox"/> Seating configuration
	<input type="checkbox"/> Food/beverage (if applicable)
	<input type="checkbox"/> Heating/air-conditioning
	<input type="checkbox"/> Parkine
	<input type="checkbox"/> Online
	<input type="checkbox"/> Instructions for meeting access
	<input type="checkbox"/> Visual display/editing
	<input type="checkbox"/> Participant video requirements
	<input type="checkbox"/> Participant audio requirements
	<input type="checkbox"/> Phone/conference call
	<input type="checkbox"/> Instructions/requirements for access
Planning Checklist (If "No/Unsure" is selected, reevaluate that item and determine a solution.)	
Is the meeting necessary?	<input type="checkbox"/> Yes <input type="checkbox"/> No/Unsure
Does each identified participant have a specific contribution?	<input type="checkbox"/> Yes <input type="checkbox"/> No/Unsure
Have critical participants been contacted for scheduling preferences?	<input type="checkbox"/> Yes <input type="checkbox"/> No/Unsure
Has scheduling been considered based on the meeting's purpose and content?	<input type="checkbox"/> Yes <input type="checkbox"/> No/Unsure
Is the meeting environment appropriate?	<input type="checkbox"/> Yes <input type="checkbox"/> No/Unsure
Has the agenda been developed and sent to participants?	<input type="checkbox"/> Yes <input type="checkbox"/> No/Unsure
Has necessary premeeting communication occurred?	<input type="checkbox"/> Yes <input type="checkbox"/> No/Unsure
Have all participants confirmed attendance?	<input type="checkbox"/> Yes <input type="checkbox"/> No/Unsure
Has a reminder e-mail been sent to participants?	<input type="checkbox"/> Yes <input type="checkbox"/> No/Unsure



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# Conducting a Meeting



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- Send a reminder 1-24 hours in advance
  - Agenda, roles, tasks, time, place
- Start the meeting
  - On time!
  - Restate purpose and objectives
  - Assign timekeeper, note taker, presenter
  - Identify the timekeeping tool



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# Conducting a Meeting



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- Move through the agenda consistently and efficiently
  - Keep people on task
  - Keep discussion positive, professional
- Assign tasks and make decisions (if applicable)
- Give contributors/presenters the floor



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**Behav Analysis Practice**

**Table 1** Common meeting problems and suggested strategies

Common problem	Suggested strategies	Suggested language
Interruptions	<ul style="list-style-type: none"> <li>• Establish ground rules for respecting other meeting participants' opportunities to contribute.</li> <li>• Ask interruptors to hold their comments.</li> <li>• Provide postmeeting private feedback.</li> </ul>	<ul style="list-style-type: none"> <li>• "Could you hold that thought for a moment?"</li> <li>• "Let's come back to that later in the meeting."</li> </ul>
Distractions	<ul style="list-style-type: none"> <li>• Instruct participants to turn off personal devices and notifications at the beginning of the meeting.</li> <li>• Politely ask the participant who is the source of the distraction to stop.</li> <li>• Pause the meeting for a brief break and privately ask the distracting participant to leave the meeting.</li> </ul>	<ul style="list-style-type: none"> <li>• "That ring tone definitely gets your attention. Could you silence it for now?"</li> <li>• "Could I ask you to close your e-mail for the rest of the meeting? I don't want to miss out on the opportunity to get your input."</li> </ul>
Off-task behavior	<ul style="list-style-type: none"> <li>• Redirect the off-task behavior by providing a relevant participation opportunity.</li> <li>• Politely ask the person to stop the off-task behavior.</li> <li>• Pause the meeting for a brief break and privately ask the distracting participant to leave the meeting.</li> </ul>	<ul style="list-style-type: none"> <li>• "Do you have any thoughts on this agenda item?"</li> <li>• "Let's minimize side conversations. Share your idea with all of us if it is relevant to the agenda."</li> <li>• In private discussion, "I am sorry, but I think the repeated distractions are holding up our progress in the meeting. Do you think this might not be the right time for you to be in the meeting?" (When a peer may present this as a question, a supervisor might use the more directive version, "I think this might not be the right time for you to be in the meeting.")</li> </ul>



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<p><b>Intrusiveness or combative responses</b></p> <ul style="list-style-type: none"> <li>• Arrange seating to focus eye contact on the meeting leader and to increase distance between participants who have conflictual interactions.</li> <li>• Establish ground rules for expected behavior during the meeting (e.g., not interrupting, respecting other participants).</li> <li>• Instruct before participants have opportunities to respond negatively to one another.</li> <li>• Deliver reinforcement equitably between participants to suppress competitive responding.</li> <li>• If the behavior impacts meeting effectiveness, stop the meeting and discuss the interaction privately with each person.</li> </ul>	<ul style="list-style-type: none"> <li>• "Remember our purpose today and that we have an expectation for everyone to be engaged and respectful throughout the meeting."</li> <li>• "This seems to be getting heated. I am happy you both care so much about this issue, but let's take a break from this discussion for now and return to this hot-button topic later."</li> </ul>
<p><b>Technology</b></p> <ul style="list-style-type: none"> <li>• Test equipment or online meeting platforms prior to the meeting.</li> <li>• Plan for a backup in case of malfunctions or difficulty with the meeting platform.</li> <li>• Create a visual aid that includes critical operating instructions for devices in any frequently used meeting rooms.</li> </ul>	<ul style="list-style-type: none"> <li>• "OK, time for Plan B. Let's use this conference call number instead of the meeting platform."</li> </ul>



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# Conducting a Meeting



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- Wrap up the meeting in the last 2-10 minutes
  - Notes - accurate and detailed
  - Action items with designees
  - Scheduling of follow up meeting (if applicable)
  - Close to allow transition time
  - Distribute the notes within 1-24 hours
- Provide private feedback about attendee behavior in the meeting



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	Open the Meeting	Manage the Meeting	Close the Meeting
Leading and Evaluation	<input type="checkbox"/> Review logistics. <input type="checkbox"/> Review ground rules. <input type="checkbox"/> Provide overview of purpose. <input type="checkbox"/> Review agenda. <input type="checkbox"/> Give introductions: <input type="checkbox"/> Self-intro <input type="checkbox"/> Meeting leader intro	<input type="checkbox"/> Manage time. <input type="checkbox"/> Facilitate discussion. <input type="checkbox"/> Manage problem behavior. <input type="checkbox"/> Provide praise for appropriate contributions. <input type="checkbox"/> Follow and redirect conversation to the agenda when necessary.	<input type="checkbox"/> End on time. <input type="checkbox"/> Review decisions. <input type="checkbox"/> Review assigned tasks. <input type="checkbox"/> Schedule next meeting, if necessary. <input type="checkbox"/> Thank participants for their time.
	<p>Meeting Evaluation Checklist (If "No" is selected for any of the following items, identify process changes for future meetings.)</p>		
	<input type="checkbox"/> Did the meeting start on time? <input type="checkbox"/> Did all participants attend the meeting? <input type="checkbox"/> Did all participants have the materials necessary? <input type="checkbox"/> Did all participants remain engaged and participate as expected? <input type="checkbox"/> Did someone take notes during the meeting and share them afterward? <input type="checkbox"/> Did the meeting end on time with an appropriate closing?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No



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## Meeting Attendance



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- Be on time, stay on time
- Be prepared
- Participate professionally
  - Stay on-task and do not distract others
  - Contribute but do not dominate
  - Follow your leader
  - Volunteer if and only if you have the time and required skills



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### Appendix C

**Rules for Meeting Participation**  
Participants have responsibilities before and during a meeting, and a highly skilled participant can enhance the value of almost any meeting. The following rules provide guidance for effective meeting participation.

- 1. Review the meeting invitation and agenda in advance.**
  - Be sure you know exactly when to go and when to get there.
  - Review any materials or complete any assigned tasks prior to the meeting.
- 2. Arrive promptly.**
  - Arrive a few minutes prior to the start of the meeting and be ready to begin at the start time.
  - If you are unexpectedly late for a meeting, enter quietly without interrupting. Well-intended apologies further disrupt the meeting if it has already begun. Apologize for tardiness after the meeting instead.
- 3. Eliminate distractions.**
  - Turn off cell phone alerts and ringer and computer notifications prior to entering the meeting.
  - Put away your phone and any materials that are not relevant to the meeting.
- 4. Present concisely and consider your audience.**
  - If you present in the meeting, practice what you will say and ensure that you remain within your allotted time.
  - Consider your audience when creating your presentation to ensure that the material is concise and appropriate for the audience.
- 5. Actively participate.**
  - Contribute to the discussion when appropriate. Avoid comments that are a repeat of information or points made by others.
  - If you are participating remotely, use the chat feature to alert the meeting leader if you wish to make a comment.
- 6. Reinforce the participation of others.**
  - Listen and reinforce the contributions of others with smiles, nods, and praise comments (e.g., "Great idea!").
- 7. Avoid interrupting.**
  - Avoid interrupting others or apologizing when it happens inadvertently (i.e., you began speaking at the same time).
  - Do not have side conversations with other participants during the meeting as this serves as a distraction and interrupts the main conversation.
- 8. Self-manage participation and interruptions.**
  - Self-monitor the frequency and duration of participation to ensure that you do not over- or underparticipate.
  - Self-monitor interruptions. If you interrupt frequently, use a self-management plan (e.g., write down the idea as a replacement behavior, provide a signal to the meeting leader for a speaking opportunity, collect data, and set a goal for participation).
- 9. Volunteer for relevant tasks.**
  - When tasks require volunteers, only volunteer if it is possible for you to complete the task in the time frame expected.
  - If any part of the task is unclear, ask for clarification before committing to the task.

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## Follow up Activities



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- Goals of:
  - 50% increase in effectiveness in every meeting
  - 20% reduction in # of meetings
  - system for scheduling meetings that doesn't interfere with productivity
- List all meetings – evaluate each
- Develop and implement plan



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**Thank You**  
Contact me at [Linda@LBehavioral.com](mailto:Linda@LBehavioral.com)



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