
Meeting Skills

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Outline

Introduction

Summary of good meeting habits

Summary of habit-building techniques

How to build good meeting habits, with exercises

Fighting Zoom fatigue with good meeting habits

Case studies and Q&A

What do I know about running meetings?

Facilitated over 75 discussion oriented workshops w/ 30 people

Served on two non-profit boards of directors

Ran unconferences - dozens of tiny self-organized meetings

Formerly IBM, Intel, Red Hat, etc.



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But mostly...

I HATE being bored

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What do you hate about bad meetings?

What is a characteristic of a bad meeting for you?

Type your answer into chat (publicly, or send to me privately) or just shout it out loud



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TL;DL version of this talk

Most of us know what it takes to run an efficient meeting: agenda, moderators, note-takers, follow-up

The hard part is actually doing those things!

Use standard habit-building techniques to gradually add new meeting behaviors for yourself

Basic good meeting habits

Create an agenda and send it out in advance

Assign meeting roles at the beginning of the meeting

Take meeting notes in a shared document

Label action items and review them in the next meeting

End meetings on time

A few standard habit-building techniques

1. Start small
2. Identify your motivation
3. Chain new habits off old ones
4. Pre-commit to another person
5. Create small annoying self-imposed penalties

We will do an example and exercise for each of these

Habit-building: Start small

Making several big changes all at once is hard!

Making one tiny change is easier

Once that change becomes habit, it is even easier

New habit seems too hard? Make it **EVEN SMALLER**



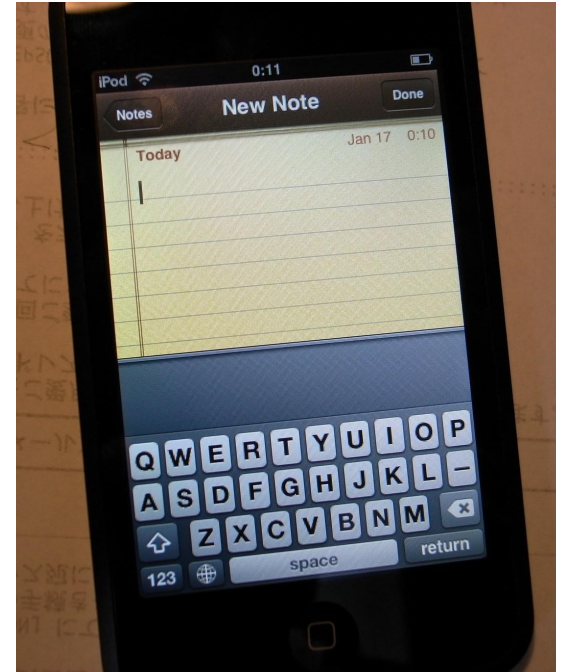
Exercise: Start small

Start a text document - any kind, whatever you like most

Use voice to text if walking around

Write "Meeting habit-building notes" at the top

You're done! You started small and you are now taking notes



Exercise: Identify your personal motivation

Write in your document how your life and job performance would be better if:

- You spent less time in meetings
- You were engaged and interested in all your meetings
- You were fully prepared for all your meetings

Share in chat or say out loud if you feel like it

Extra credit: write it on a sticky note on your monitor

Exercise: Identify your personal ANTI-motivation

Write the positive things you get out of:

- Spending more time in meetings
- Going to boring meetings that don't engage you
- Not preparing for meetings

Share in chat or say out loud if you feel like it

Extra credit: write it on a sticky note on your monitor

Habit-building: Chain new habits off old ones

You started small, now you have one tiny new habit

Now add a second tiny habit that is connected to the first habit

E.g. if you brush your teeth every night, you can add a new nightly habit by doing it before or after that



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Chaining habits to get to an agenda

When creating a meeting invite (existing small habit), type "Agenda - please add items" into the invitation description (new small habit chained off first habit)

That counts as "having an agenda"

Once that gets easy, type one item below it, then three items, then move the agenda into a separate doc, add a section for action items, etc.

Exercise: Write an agenda for your next meeting

Open or create the invitation for your next meeting (if you don't own a meeting, make a fake invitation)

Write "Agenda - please add items" in the description field

Save it. You're done! You made an agenda!

Extra credit: When you remember something you want to talk about in the meeting, add it to the invitation

Meeting roles prevent bad meetings

Every meeting should have people filling these roles:

1. Facilitator - runs meeting
2. Moderator - gives everyone a chance to speak
3. Note-taker - takes notes
4. Timekeeper - tracks time and interrupts if necessary

<https://frameshiftconsulting.com/meeting-skills/>

Moderated vs. unmoderated meetings

Moderated meetings require people who feel responsible and empowered to keep discussion useful

Unmoderated meetings use the "unmoderated caucus" format with no formal responsibilities

Both styles "work," but one requires planning and work in advance

Why do all the work of meeting roles?

Because "unmoderated caucus" format is terrible

Rule: "The first person to start speaking gets the floor"

This rule discourages "listening" and "thinking" and incentivizes speaking quickly, at length, and without pausing

What does this do to your meetings?

Favors people with a high "caucus score" (calculate yours)

<https://chelseatrov.com/2018/03/29/why-do-remote-meetings-suck-so-much/>

90 second stretch break

Preview of Zoom fatigue tips!

Turn off your camera and move around

Thought to take with you:

Unmoderated meetings discourage "listening" and "thinking" and incentivize speaking quickly, at length, and without pausing



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Habit-building: Pre-commit to another person

Many people have strong "But I promised!" energy

If you run a meeting, tell the person in that meeting that you would least like to disappoint that you are committing to a new small meeting habit

Give them permission to remind you, publicly or privately

Ideally, make a two-way pact or competition

Exercise: Pre-commit to one meeting role

Identify a meeting role you want to use in one upcoming meeting (just one, start small)

Decide whether you will assign it, ask it, or do it

Choose a person you will tell about this resolution

Write all this down in your document

Extra credit: Add this to the first line of your agenda

Using meeting roles

Include assignment of meeting roles in your standard meeting agenda template (chaining habits)

One person can take on multiple roles

Note-taker cannot participate fully, so if that is not their official job duty, rotate the note-taker and have a backup note-taker for when primary note-taker speaks

Do not just ask for volunteers!!! Rotate/assign

Habit-building: Creating self-imposed penalties

You decide to do a small negative thing if you fail to follow through on your new habit

Penalties should be more unpleasant than the unpleasantness of starting the new habit

Penalties should be in proportion to your means

Telling other people about your decision helps keep you accountable

Suggestions for self-imposed penalties

What self-imposed penalties work for you?



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Exercise: Create self-imposed penalties

Write down a small annoying penalty that would motivate you to follow-through on a meeting habit

Write down a meeting habit you could pair it with

Extra credit: Tell the people in your meetings and give permission to remind you of it

Extra extra credit: Make a bet with someone else also trying to learn a meeting habit

Fighting Zoom fatigue

One real solution: fewer, shorter meetings

Edward Tufte meeting advice: "Finish **early**" not just on time

Add more breaks - people still thinking, more creative

Cameras off, or at least self-view off

Normalize walking/moving around/being outside

Meeting habits to beat Zoom fatigue

Use Google Calendar "Speedy Meetings" feature

Start meetings 10 - 15 minutes AFTER the hour

Set an alarm for 30 minutes, tell everyone to turn off their cameras for 2 - 5 minutes and move around

Have weekly "ended meetings early" competition

Most powerful person says "I will leave in 5 minutes"

Case study: My agenda/notes system

Meeting facilitator schedules prep time on calendar

Note-taker copies standard agenda template for each meeting (meeting roles, action items, etc.)

Repeating meetings: create new agenda at the end of every meeting; everyone adds items until next meeting

All meeting notes are in shared documents in shared folder with standard naming so always available

Case study: Wikimedia unconference

Gave a talk explaining meeting roles and agendas

Created a template agenda available on EtherPad

Printed cards for each room explaining:

- meeting roles
- short link to agenda template
- directions on how to link notes into main document

Result: easily findable notes for dozens of sessions

Summary

Changing meeting habits is hard!

Use standard habit-forming techniques

Start with ONE SMALL habit and use motivation, chaining, pre-commitment, and penalties to adopt it

No, that habit is too big, pick a smaller one

Use any other method that helps you get things done

Q&A

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Frame Shift Consulting

<http://frameshiftconsulting.com/ally-skills-workshop/>