



Making Meetings Effective

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Want to be a high performance practice? TransformMED Practice Facilitator, Barbara Johnson, PhD, states that in order to achieve that goal, you must first hone the skill of managing regular, productive meetings. This is often a skill that is overlooked, but is crucial to decision-making, communication, and management, all of which are necessary for high performance practice. A lot of meetings can feel like a necessary evil; something most people attending dread. Here are some ideas for turning your team meetings around!

First of all, it's important to note that there are several types of meetings conducted within medical practices: staff meetings, planning meetings, problem solving meetings, etc. Each different type of meeting can require different preparations, but there are some basics that must be covered for all of these. TransformMED also encourages medical practices to initiate "huddles" on a regular basis, but these are not traditionally referred to as "meetings." More information on huddles will be provided in a future feature story.

Dr. Johnson recently conducted a conference call with some of the facilitated NDP practices to discuss effective meetings within the medical practice environment. Here are some highlights from that call.

"Meetings may be a necessary evil, but that's where all the decisions get made." (BJ)

ORGANIZATION:

- Keep it simple * Stay on topic * Stay organized.
- Start on time, end on time. It is critical to respect the time of those who cared enough to come.
- Have a flip chart or handout with "ground rules" such as:
 - no one can dominate the discussion
 - everyone is allowed the opportunity to weigh-in on the discussion

AGENDA:

- Distribute agenda two days prior to the meeting and ask everyone to read it
- Based on feedback, update agenda as needed before handing out copies at the meeting

- The two steps above should help avoid handing out agendas at the last minute. People should come to meetings prepared to discuss what they have already thought about
- Office managers and the like should not be afraid to delegate the agenda to other staff which may even result in increased staff interest/participation
- There are traditionally three types of agenda items it helps if each item on your agenda is clearly marked to indicate one of the following:
 - Announcements
 - Discussion Items
 - Decision Items

FACILITATOR:

- A “roving facilitator” is usually a good option. In this type of meeting, participants take turns facilitating each meeting, thereby sharing the responsibility and including different people which helps with group interaction and group formation
- A facilitator is critical to keep the meeting on task, ensure no one is dominating the discussion, and to make sure everyone's voice is heard.
- A facilitator is the one who ultimately says, “OK – time to make a decision.”

ACTION REPORT:

Most meetings should produce an Action Report, something that states what will be done, who will do what, and when.

- Action Reports should include a task, a task owner, and a due date for each action item. The task owner is the person(s) responsible for the task
- Action Reports should be distributed within 24 hours of the meeting
- If time is short, the Action Report could just include the action items and the major issues discussed

RECIPE FOR SUCCESS:

All good meetings should encompass the following elements:

- A set day/time – **keep the time sacred**
- Agenda (ideally, distributed 2 days ahead of time)
- Updated agenda if time allows and feedback warrants it
- Hard copies of agenda at the meeting
- Everyone's opinion is considered before a decision is made (with meetings of <12 attendees, everyone should get a chance to voice their idea/opinion)
- Decisions are made
- An Action Report is distributed within 24 hours of the meeting
- At the end of the meeting, do a “check” to see if the meeting was successful
- Continually review meeting attendees to see if others need to be included.

ROADBLOCKS OF SUCCESSFUL MEETINGS:

- Meetings that don't start or end on time
- Unorganized meetings with no direction – makes it feel like a waste of time
- Autocratic meetings where 1 or 2 people dominate the conversation and not everyone's voice is heard
- People who don't participate

“Meetings are an opportunity to work as a group. A group is not just a collection of individuals. A group is when you get people COMBINING together to merge all talents and

ideas, individuals interacting to create synergy and brainstorming to create ideas. Your goal with meetings is to use this as a way to combine your talents to face familiar or unfamiliar challenges, such as those posed by TransforMED." (BJ)

IDEAS FROM THE PRACTICES – WHAT WORKED FOR THEM:

- Determine if it's possible to physically leave the office environment for a brainstorming meeting – not on a regular basis, but occasionally. One practice found that doing this just once helped them tremendously in making some major decisions. After that, the short weekly meetings at the office will keep you on track
- Don't forget the importance of collegiality that meeting environments provide. While good meetings are structured, realize the intrinsic value of increased cohesiveness and don't completely disregard personal stories and sharing
- Start the meeting on time, even if everyone isn't there. It is equally important to respect the time of those who are already there
- When patient visits, etc. prevent physicians or other providers from attending meetings, continue to include them with agenda and action plans. They need to be involved
- Schedule the meeting on the same day and time and try to avoid changing due to external circumstances

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