MEETINGS

E-PLM 2.0 - Experiment 5.1

Insights and materials for adapting meetings to team stage and needs

This report has been created within the E-PLM 2.0 project, Experiment 5.1.
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Meetings: Insights and ideas for adapting meetings to team stage and needs

> *"An important context for teams, those meeting arenas, if you want to call them that way. I think a lot of improvement can be reached there."*
> -a member of the E-PLM 2.0 community

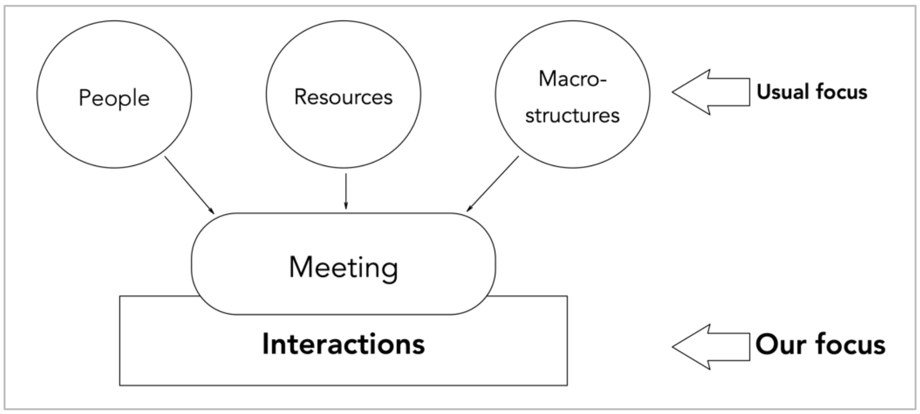
Dear E-PLM community,

One of you has once referred to me (Ellen) as "*the fly on the wall*": I join your meetings, sit around and type mysterious accounts into my laptop. From time to time, I also come by to talk to you about experiences. You might wonder why I am there or why we have decided to join, observe and listen to what you have to say about your meetings in the first place. Our rationale is as simple and straightforward as this: We are convinced that meetings constitute the most important space for collaboration, especially when participating parties come from different organizations and thus cannot quickly walk into each other's offices. If we again use the beautiful words of one of you, then **meetings are your arenas for coming together**, for discussing and negotiating goals, for sharing insights and learning from each other, for jointly struggling over complex issues, for celebrating successes and helping with frustrations. **Meetings are basic building blocks of work today in general and one of the most important building blocks of the E-PLM 2.0 initiative as meetings are where teams get to collaborate.** Meetings are central to your collaboration, which makes it ever more important to have good meetings[1].

However, effective meetings don't just happen[2]. They require preparation and thought as different formats are required at different team stages and for different meeting objectives. This stands in stark contrast to falling back on routine ways such as monologue-alike PowerPoint presentations, detailed status updates or broad brainstorm sessions, time and again. Indeed, these structures dominate meetings both within organizations and across them. They have been around for years and we all keep on using them, probably because that is what we have been exposed and used to. Yet, this standard repertoire of meeting practices is often either too tight or too loose: just think of a PowerPoint presentation that puts spotlight on only one person and almost invites the rest to sit back and relax or think of an unguided brainstorm session that is about everything and nothing all at once. Both leads to unequal contributions from team members or meeting participants, low levels of commitment and energy or superficial discussions. Indeed, a large-scale questionnaire study named the lack of proper meeting practices as a key reason for poor meeting quality[3].

[1] Allen, Lehmann-Willenbrock, & Sands, 2016; Baran, Rhoades Shanock, Rogelberg, & Scott, 2012; Kauffeld & Lehmann-Willenbrock, 2012
[2] Mroz, Allen, Verhoeven, & Shuffler, 2018
[3] Geimer, Leach, De Simone, Rogelberg, & Warr, 2015

Structures as the conventional presentation or brainstorm sessions we just talked about guide what is being done in meetings[4]. Most of the time, we take these structures for granted and do not pay much attention to them, not even to speak of changing them. Instead, we focus on changing larger and more visible ingredients of performance: We train people new abilities, we add resources to a team or we adapt the macrostructures surrounding it, such as implementing knowledge-sharing platforms. To increase the effectiveness of meetings, for example, we tend to put wall charts about how to run effective meetings in meeting rooms, instead of changing the more implicit meeting interactional structures.



In this report, we share insights of what we have observed and heard in our research and propose ideas on how to tailor meetings to what the team needs. We illustrate **four typical meetings traps** that we have observed and found in our research and present recommendations and 12 alternative interaction structures that teams can use in their meetings to help them avoid or overcome these traps. Both can help team members to change the implicit patterns underlying their collaboration.

Trap 1: Meeting without discussing the overall goal	**Trap 2:** Meeting without defining structures and roles
Trap 3: Meeting without fully engaging and criticizing	**Trap 4:** Meeting without planning further and reflecting

[4] Lee, Mazmanian, & Perlow, 2019

In other words, we propose small changes in routine practices that can help team members to organize and engage with their work in new manners. The interaction structures we describe constitute alternative ways for collaborating, learning and discovering solutions together. Applying and using them sure takes the willingness to take small risks and to suffer through a bit of anxiety the first couple of times. Some long-standing habits will need to be broken and you might need to get out of comfort zones here and there, but once you have gained some new comfort with using these structures, you will see how easily they spread from person to person. Following the credo *one bite at a time*, go one by one when testing out the structures: start with one, then use other, maybe combine them, then test others. Just as every learning, adopting new structures and ideas is a process, not a one-time-thing.

To end, we still have a few words of thanks: Thank you for welcoming us in your meetings and thank you for taking the time to share your experiences with us. Please do not hesitate to reach out if there is something you would like to share:

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Beginnings of teamwork

Trap 1: Meeting without discussing the overall goal

> *"To do it for a reason. And the reason could be just for fun, because it's interesting. People in the team think it's interesting and they all put in effort."*
> -a member of the E-PLM 2.0 community

Much of the success of a team project or collaboration is determined in the very first meetings. It is important that team members take sufficient time to discuss the direction and objectives of their joint work. Finding a common purpose that all members agree upon helps creating a team feeling and ensures that all members are pulling the same strings:

> *"We work like a team because our goals are similar. Of course, you have different processes, but still, we have the same discussions. That's the big difference!"*

Having a clear and common goal is important to get a team on the right track, build feelings of relevance and commitment and ensure that activities are designed purposefully:

> *"If you talk to the others, it's always nice to hear that they experience the same problems. We have the same goals around these problems."*

When clear and common goals do not exist in a team or collaboration, that is often for a very simple reason: Team members never took the time, or at least not sufficient time, to jointly answer questions as *What is our purpose of working together now?* or *What do we want to achieve in this team?* They agree on and write down a goal too quickly, moving on to next steps before making sure that everyone sees relevance or benefit in this goal or understands it the same way. Talking about content is important – but only with a clear goal this content can be made sense of exactly as needed:

> *"It's really how to say it, cloudy, it's not very clear. It's not very clear what the goal is. They put it on paper but it's still just words."*
>
> *"I have also heard a lot of from other members that sometimes they don't, they just don't know what direction they are going in. Yeah, really searching."*

Not taking sufficient time to jointly work on a team goal in the beginning can have significant consequences. Team members can work towards different ends or they simply do not put efforts in as they do not know what for:

> *"I think we're not yet on the same page in terms of having a common goal in this experiment. As long as this remains unclear, the question really is whether we'll be able to succeed or not."*
>
> *"If I fail on my limited scope, I only fail myself. And therefore, well, I might have the feeling that the team is still doing okay. But if everyone has that same feeling, then the team fails."*

Figure 1 summarizes the main consequences of having a common team goal versus not having one.

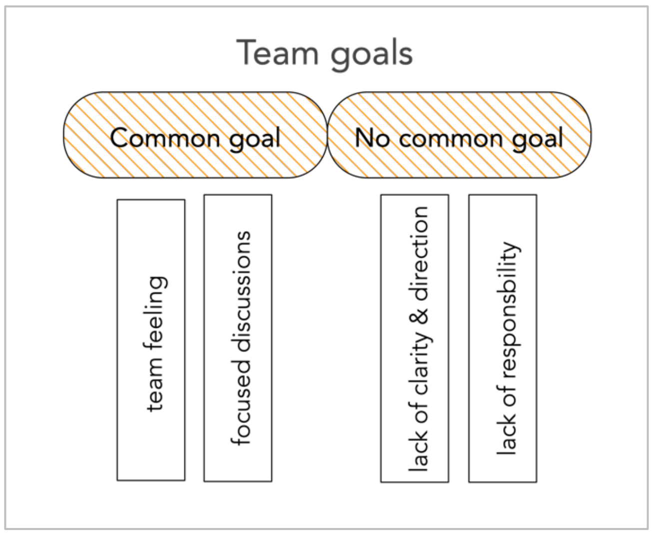


Figure 1: Having or not having a common team goal

Trap 1: Recommendations and alternative interaction structures

Take sufficient time to discuss shared problems and goals. Make sure that at least one entire meeting is spent on discussing and defining the team's goal. Simply putting a goal on paper is not enough as that will neither help shared understanding nor create much commitment – you also need to talk about it.

Make sure that everyone gets to speak. Make sure that all team members participate in the goal discussion and share their perspectives and feelings. That is the only way to avoid misunderstandings and move towards a goal that is relevant for all parties involved.

Problem Pitch

AIM. With the *Problem Pitch*, team members can describe the problems and challenges they experience in their daily wok or organizations in a standardized and unharmful way. As each problem pitch is composed of four standard but important elements, understanding each other's problems and challenges is facilitated and links between problems, situations and challenges are more easily detected.

HOW. Take turns in describing your problem or challenge along four basic elements: *Role, Feeling, Problem/Challenge/Situation, Why*. Start from the role that have, describe how you feel in a certain situation and explain why this is a problem or challenge for you. For example:

> *I, as a human resource manager, feel frustrated when talent leaves the organization because I think keeping good people is important for health and growth.*

****GOAL TWIST.*** Instead of talking about problems, you can also use the four elements to describe and discuss goals.
****MAKE IT A CANVAS.*** For a more complex variation, you can jot down your problems/challenges/situations and goals in a canvas that links your current state to your future state. This also facilitates a discussion on what exactly to do to move from one to the other. Begin with the current state, then jot down how the future ideal state would look. Your next step is to bring the current and the future state closer together by brainstorming on and writing down the changes that will need to take place to move closer towards your goal.

Current state (problem, challenge, situation)	Changes (how to go from current to future state?)	Future state (goal, objective)

What and So What?

AIM. Team members answer two questions to facilitate goal discussion: (1) ***What*** they would like to work on in the collaboration (so what their goals are) and (2) ***So what***, so why that goal is important to them or their organization. Centering the goal discussion on these two questions ensures that team interaction remains focused and makes sure that every member gets the chance to describe his or her goals *and* the relevance of these goals. Make sure that everyone speaks and is heard!

HOW. Each individually, think about your *What* and *So What*: What would you like to work on in the team, what is your goal for the collaboration, why is that important or why does it matter? In plenum, one after the other, describe your goal and your *So What* to your colleagues. It might be useful to take notes on a whiteboard to help see overlap or trends. Do not hesitate to ask questions if something is unclear. Once all goals and *So Whats* are collected and written down, try to detect patterns in answers and use everyone's input to collectively discuss and form a shared goal for the team.

Min Specs

AIM. With *Min Specs (= Minimum Specifications)*, team members specify the absolute minimum must dos for their joint work. Thereby, basic goals and ground rules for the teamwork are developed and clear expectations are set that help keeping team members responsible and accountable for their actions. Clearly stating *what must be achieved at the very least* also helps preventing future frustration.

HOW. Individually or in pairs, generate a list of *all* must-do goals and activities of your collaboration. Make sure that your list is as complete as possible, rather have a few more than a few less items on your list. Once you are satisfied with your full list, reduce it to the absolute minimum needed. Compare across individuals and/or pairs and, all together, consolidate the shortest list of what the team needs to accomplish at the very least. Put this list somewhere where everyone can access it and don't forget to take a look at it again from time to time!

Trap 2: Meeting without defining structures and roles

> *"The main point is just to get things structured and get people working on the right things."*
> *"We have the expertise to succeed, we need to organize ourselves to do that."*
> *"We need to be more specific. What are we going to do? Who is responsible?"*
> -members of the E-PLM 2.0 community

We now know: Common and clear goals are key to successful teamwork. Two more things to consider in the early stages of a new team or collaboration are **structures** and, related to that, **roles**. Even the clearest common goal will not be achieved without defining who will work on what and when. To move from talking to doing, clear structures and deadlines are needed that push for progress:

> *"We could be in a very good position to make things work, but currently there's no real concrete deadline or concrete working plan or anything to get stuff done. I think we should just start implementing stuff."*
>
> *"I see a lot of talk, maybe because it has a longer time span. I like to work a little bit more towards shorter term goals to get something done."*

Hereby, a clearly defined team leader can help in pushing the team forward. Currently, this is something that people are missing:

> *"There's a lack of project manager to really call you to your responsibilities."*
>
> *"The project leader should push you."*
>
> *"And then just check up on each other to see if it's done, maybe that's the role of the leader. For me, it's not clear who the leader is."*

In general, team roles often appear to be vague and unclear, concerning both own and others' roles. Unclear roles complicate finding one's spot within the team and can also make it harder to reach out to team members for help or to delegate tasks.

> *"I'm asking myself if it's useful for me to attend because I don't have a specific role just yet."*
>
> *"I could be more helpful to the others. If I am more aware of what I have to deliver. Sometimes for me, it's not very clear."*
>
> *"What his role is? To be honest, that's a question mark for me."*
>
> *"I think in most teams, people have some sort of task or function and I still don't know what his is."*

As with team goals, clear structures and roles often do not exist in a team or collaboration because members never took proper time to discuss and define them. With all the teams one is currently part of, we quickly believe that teamwork needs no additional structures: Everyone must already know the rules of the game. However, as with team goals, it is key to discuss roles and structures with everyone on board. Structures that facilitate work and team progress should be in place early on, to avoid standstill or delays and to get a team from talking to doing:

> *"You see more or less at a standstill a lot of projects."*
>
> *"I see a lot of experiments which are delayed."*
>
> *"It's going much too slow."*
>
> *"We should be doing something but nothing's happening."*
>
> *"Because otherwise it would just be talking together and not achieving very much."*
>
> *"I think there are some ideas but there is little work being done."*

Figure 2 summarizes the main consequences of unclear team roles and structures.

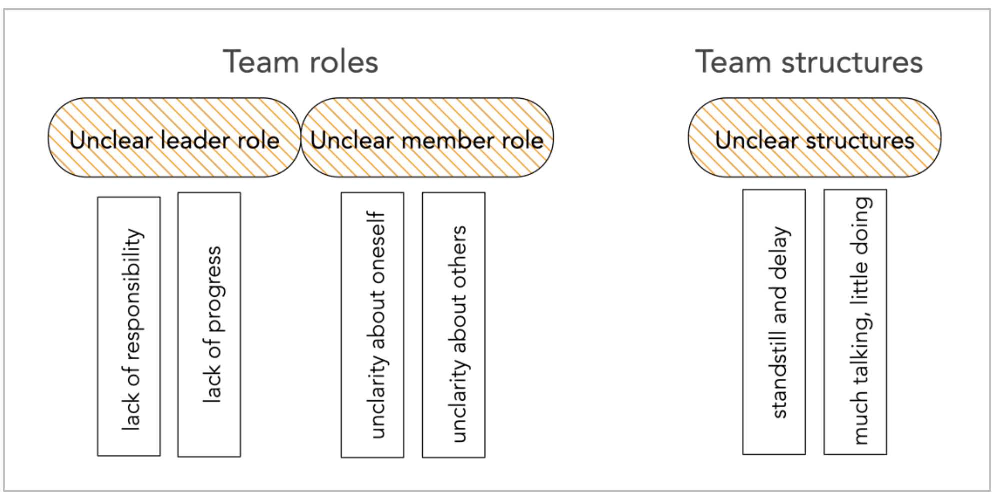


Figure 2: Possible consequences of unclear roles and structures

Trap 2: Recommendations and alternative interaction structures

✔ **Be clear about team roles and the activities and responsibilities they include.** Make sure that everyone is aware of his or her role in the team, preferably linked to skills and abilities. It is a lot harder to contribute to teamwork when one's role or function is unclear. Also, it is a lot harder to ask others for help and input without knowing what their exact role in the team is. Team leaders need to ensure that roles are clear and that the team is moving forward.

✔ **Set up and be explicit about the team's structure.** What are your team's main activities and milestones? When will activities have to be completed and milestones be reached? Who is responsible?

What, So What, Now What? **continued**

AIM. Team members have already discussed what they want to work on in their collaboration and why that is important for them when answering the two questions *What?* and *So What?* In order to make bigger goals more specific and thus actionable, it can help to answer a third question: *Now What?* What are the steps that need to be taken and the activities that need to be accomplished to move closer to the ultimate goal? *Answering the question of what to do now helps breaking up complex goals into smaller tasks*, seeing what can be done immediately as well as establishing milestones for on the way.

HOW. Consider your team's *What?* and *So What?* again and make sure there is still agreement on these. Afterwards, individually or in pairs, try to answer the question *Now What?* It might help to use sticky notes to write down the activities that come to mind (this also enables sorting and ordering activities for example by importance or chronology). Once everyone has had sufficient time to answer the question *Now What?*, explain your answers to each other in plenum. You might want to take notes on a whiteboard to help see overlaps or trends. Do not hesitate to ask questions if something is unclear. Once everyone's answers are collected and written down, try to detect patterns in answers and use everyone's input to collectively discuss and form a shared roadmap of activities for the team to conduct in future.

****ROLE TWIST.*** Once you have agreed on activities and milestones, it might be useful to extend your discussion to everyone's roles and responsibilities. Knowing which activities will be performed and which milestones will need to be reached is great, but what's even greater is when individuals start feeling responsible for these activities and milestones. Discussing who will be in lead of which activity or milestone ensures that team members can be held accountable in future and understand what their but also others' roles are within the team.

What I Need From You

AIM. When a team has just been established or when team members come from different organizations, explicitly stating what you need from others can be difficult. Hesitation often prevails over articulation, hampering rather than facilitating collaboration. Once activities and milestones have been defined and team members have divided up responsibilities, invite everyone to clearly articulate what he or she needs from the others to perform the activity or achieve the milestone he or she is responsible for. Such needs often remain implicit for far too long as we assume others to kind of automatically know when we need their input or to speak up by themselves when they have something valuable to add. This not only makes us miss opportunities, but also quickly isolates work.

HOW. Go through your list of activities and milestones (your *Now Whats*). For every activity or milestone, ask the person in charge to clearly address his or her team members with what he or she needs from them. Team members that are addressed are allowed to answer using one of four possible responses: *Yes / No / I will try / Whatever* (please note: whatever should be used when the need or request was too vague to provide an answer). It might be useful to write down the needs and reactions on a whiteboard or piece of paper, so that they can later on be retrieved again.

Premortem game

AIM. With *Premortem,* team members take time to think about risks and opportunities in an in-depth manner. The joint exercise or structure helps to gain a better and joint understanding of the team's context, challenges and possible successes, facilitating the development of a team spirit or identity and fostering team commitment. It mixes fun and laughing with the serious aspects a team needs to consider in its early stages and thus caters for an engaging exploration of the team's future.

HOW. Split your team in two halves. One half is told to fill the glass half empty, call their inner cynic and imagine they've woken up on the wrong side of the bed. The other half is told to fill their glass half full, put on rose-tinted glasses and imagine a bright and sunny day. Ask the negative or failure group to brainstorm all reasons why the project could fail. Each catastrophic outcome and the reason for that should be written down on a sticky note (for grouping, if appropriate). Ask the positive or success group to brainstorm all ways the project could succeed in the best way possible. Encourage them to write down all the things they would be proud of, again on sticky notes. One member of each group should summarize the main ideas and themes before groups go on to challenge and push each other to deeper lows and higher highs, thereby uncovering additional risks and opportunities. Finally, jointly narrow it down to the top three risks and the top three opportunities for the project (focus on outcomes you can actually influence!). Then get back into groups: the failure group tackles top-voted risks while the success group tackles top-voted opportunities, coming up with tactical plans and structures (including activities and milestones) for preventing and seizing).

****MIXING TEAMS TWIST.*** The failure group might enjoy some positive vibe after all, so suggest mixing groups for the final task of coming up with a tactical plan or structure to prevent risks and seize opportunities: The failure group works on the top opportunities while the success group tackles the top risks or challenges.

Throughout the teamwork

Trap 3: Meeting without fully engaging and criticizing

"You have to start actually doing something now."

-a member of the E-PLM 2.0 community

Once goals and structures are properly defined and the team knows what it aims to work towards, it is important to move from talking to actually doing things. It is important that a team preserves its initial drive, excitement or enthusiasm so that all team members stay engaged and active. Discussions need to remain energetic and focused and for that, proper content to discuss and interact on is key:

> *"And then if we have meetings, I think we really need content that people can interact on. That's relevant."*

Otherwise, meetings can easily feel like a waste of time – especially when it becomes more and more difficult to see progress over time. Criticizing team members for not delivering enough content or doing sufficient work is particularly difficult in interorganizational contexts where others' daily job requirements and structures are hardly known. Yet, the cost of that is often lack of progress and, with that, decreasing motivation and commitment:

> *"If you never really say that you are disappointed about the work someone else has delivered, that's not really bringing you further."*
>
> *"You don't want to cause a conflict between companies, so you will always be more cautious with how you give comments, but that's not making it more productive."*
>
> *"You don't want to start a conflict, so you just go 'too bad, try to do it for next time'. But the next time is one or two months later."*

Constructive criticism is important to keep a team moving forward and also emphasizes the importance of a project. If no one ever speaks up, this can easily convey an impression of non-significance to others which, in turn, can keep down efforts on the long run:

> *"I don't know, maybe I also sometimes don't do enough, or not what was expected. But because no one says it, no one wants to go into a conflict, I'm just not aware of it. Or maybe sometimes I am aware of it, but the others still act as if they are satisfied, so then I just keep doing it like that."*

Equally important for keeping a team moving forward is everyone's full engagement. If team members do not show up at meetings or spend most of the time checking their emails or phones rather than joining conversations, this gives a similar impression of non-significance, which easily spills over to the rest of the team:

> *"They just don't do things. So I also stopped. I just copied their behavior."*

On top, not engaging in discussions increases the likelihood of misunderstandings – a risk that is particularly prominent in interorganizational teams where team members know little about each other's structures and cultures. This makes it ever more important to ensure that everyone participates and engages in the team's discussions and interactions:

> *"Because sometimes in the discussions we automatically assume that the other persons know exactly what we're talking about. That's not always true, but hard to find out without feedback or them speaking up."*
>
> *"Also things as company culture and in general how things work there, that's very often some form of automation and if you don't properly talk about that with each other, then things go wrong very quickly."*

Figure 3 summarizes what could happen when team interactions lack content, feedback and criticism.

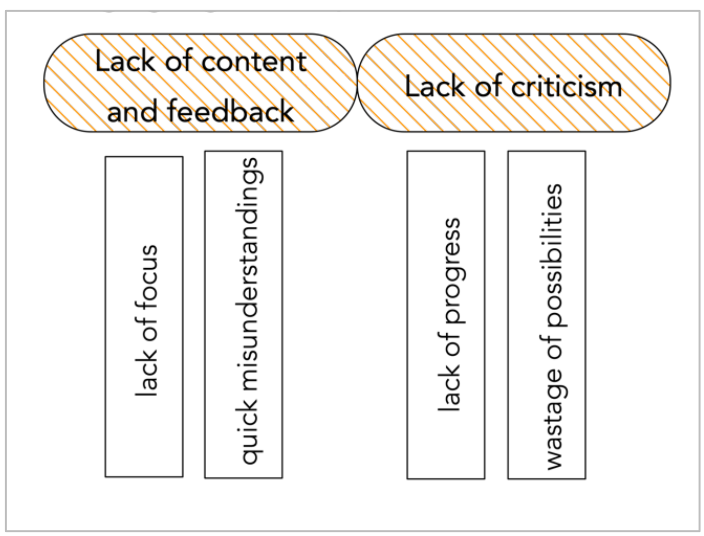


Figure 3: Possible consequences when content, feedback and criticism are lacking in team interactions

Trap 3: Recommendations and alternative interaction structures

Be clear about that content and full presence and participation is expected in team meetings. Just showing up to meetings will not make a project a success and team members are expected to prepare meetings so that scarce collaborative hours are efficiently used. Team leaders might want to ask team members about their goals and inputs a few days before the next meeting and prepare the agenda accordingly. Speaking of agenda: Always make sure to include an item on *Learning*, *New Stuff* or *Trend-Sharing* to avoid mere status updating: While it's important to let everyone know what is going on, it is crucial to not let updates become the core activity of meetings.

Encourage constructive criticism to avoid feelings of frustration and standstill. With defined activities and roles in place, voicing concerns and criticism will already be easier as team members can be held accountable for their (lack of) efforts. Still, it is sometimes difficult to find the room and space for articulating criticism in a team of multiple, different parties. Make sure that this room is provided to prevent negative spirals from tearing down your collaboration.

1-2-4-ALL

AIM. It can sometimes be difficult to include all team members, especially when group sizes are bigger, or it is always the same people speaking up. With *1-2-4-ALL*, your team can generate and voice more ideas and reactions in a much faster way. Everyone's know-how and opinions are tapped so that the team can engage in more open and generative conversations.

HOW. Each individually, (1) reflect on a question or issue, a presentation you have just seen, an idea someone has proposed, etc. If you want, jot down a few notes. Next, ask team members to find one other person (2) so that they can share their thoughts, opinions, ideas, etc. Team members may talk to the person sitting next to them or you may invite them to move around and mix things up a bit (this is especially recommended when people from the same organization sit next to each other – which they usually do!). Once that is done, make sure that each pair finds another pair (4) to join up with or – if your team is not that big – continue the conversation with the whole group (ALL). Ask team members to share interesting things they have heard or said in the previous rounds and write these on a whiteboard (or similar). Finally, ask an open question as *What is the key insight you gained from this?*, *How has your view or understanding changed of this issue?*, *What opportunities do you see for making progress on this challenge?* or *What ideas and actions would you recommend?* Your question should reflect what was talked about (the question, issue, presentation, idea, etc.).

Suffocating Flames

AIM. Counterproductive activities and behaviors need to be addressed and stopped to make space for engagement and innovation. By inviting creative destruction, a team can let go of what it knows limits its success and productivity. *Suffocating Flames* especially helps when feelings of frustration and standstill become increasingly prominent in a team. It induces a seriously fun yet also very courageous conversation. Since laughter often erupts, issues that are otherwise a taboo get a chance to be aired and confronted.

HOW. Think about your overall goal or about some of your minor goals, activities or milestones. Then ask team members to make a list of everything they could do to make sure the team achieves the worst possible outcome (in light of this goal, activity or milestone). Write down everything that team members mention, then go down the list item by item and ask: *Is there anything that we are currently doing that in any way resembles this item?* It is important to be extremely honest. Make a list of all the team's counterproductive behaviors. Finally, go through this list and discuss and decide what first steps your team will take to help stopping what you know creates undesirable results.

****1-2-4-ALL TWIST.*** You might want to combine *Suffocating Flames* with the *1-2-4-ALL* structure: First, each individually, make a list of things the team could do to achieve the worst possible outcomes. Then put together the list of items your team is currently doing in pairs. Finally, with the entire group, determine for each item of the second list how to overcome it.

15% Solutions

AIM. With everyday tasks and routines keeping us busy, it can sometimes be hard to imagine that a side-project collaboration will ever get to enough time and attention and thus some good progress and results. That can easily lead to feelings of frustration and standstill and goals appear increasingly far away. In such situations, it is important to keep up momentum and make members realize that even small steps and actions can lead towards an end goal. Asking for and discussing *15% Solutions* can help revealing the little actions everyone can do immediately. At a minimum, that will create momentum, which often makes a big difference in the end. *15% Solutions* can show that there is not as much reason to wait around and feel powerless as team members initially thought. Moreover, *15% Solutions* help team members focusing on what is within their discretion, instead of what they cannot change. With just one question, the team conversation might be flipped to what can be done, rather than to what cannot.

HOW. In light of your team's goals, activities or milestones, ask *What is your 15 percent?* Allow people to individually come up with a list of their own *15% Solutions*. Afterwards, ask them to share their *15% Solutions* with the group. Team members can react to what others have said, asking clarifying questions or offering advice. It might be useful to write down what people have stated as *15% Solutions* in order to be able to come back to them later, if needed.

****5% OR NEXT-MEETING TWIST.*** If 15% still appear to big, experiment with decreasing the number (e.g., to 5 percent). Alternatively, you might try ending a team meeting with asking team members about their *next-meeting-solutions* or *next-meeting-activities*: To understand what they can realistically do but also to ensure they leave the meeting with clear tasks that they are held accountable for in the next meeting.

Trap 4: Meeting without further planning and reflecting

> *"You sit together. Talk a lot. And then everybody leaves without actually a plan or actions."*
>
> -a member of the E-PLM 2.0 community

With common goals, a clear plan of actions, defined roles and engaged discussions, teams have built a fruitful foundation for their joint work. However, it is important to ensure that planning continues as long as a team is working together – to account for possible changes but also to keep track and stay on top of what has, is and yet will be happening. If activities, milestones and responsibilities are defined and agreed upon during initial team stages but then are not traced along the team's further progressing, they easily get out of sight again. It is important to make looking at activities and milestones a team routine and to make sure that team meetings do not end without clearly defined tasks:

> *"What I miss after each meeting is a clear overview of what are the actions, what do we have to do next, some kind of a summary. So that's what we've decided, that's our to-dos for next time."*

Equally important is to circle back to tasks and actions items from last meetings at the beginning of the next meeting. Tasks and actions need to be systematically followed up upon to make sure feelings of responsibility and accountability do not decrease over time and work is accomplished:

> *"And actions that there are, they will not be followed up on. So those go nowhere, really slowly."*

Establishing routines that trigger team members to look at activities, milestones and to-dos both in the beginning and the end of meetings helps them to stay on track and on top of things, conveys a feeling of progress and control and can avoid that single team members shed from their responsibilities.

Finally, having really good and effective meetings requires some reflection here and then. What appeared to be a useful routine or structure in the beginning might change over time and discussions can easily lose focus and go many different ways without us realizing. Jointly looking back at what has been accomplished so far – always in view of the bigger goals – can help adjusting details on-the-go and ensures that team members remain committed to and satisfied with what the team is doing and where it is going:

> *"We have so many other things that we want to discuss in this group that we do not look back in time to check if what we did is right, if whether we still agree on what we chose to do."*
>
> *"Reflecting, looking back, that's not something which is happening right now. But I think it could be a good thing."*

Figure 4 summarizes the main consequences of not having action items or not checking them as well as a possible consequence of never reflecting on what has been accomplished so far.

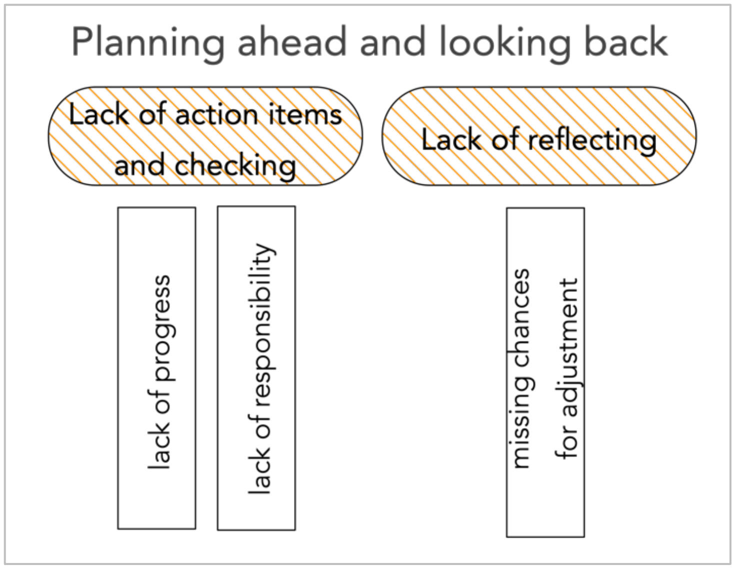


Figure 4: What can happen if teams work without actions items, checking or reflecting

Trap 4: Recommendations and alternative interaction structures

Establish a routine of looking at activities. End meetings with clearly defining the tasks that team members will have to work on until the next meeting. Always make sure these tasks are synchronized with your team's bigger goals or milestones – it happens too easy that we lose sight of these over time. Begin meetings with checking the action items you have defined previously: what has been done and what has not been done, what are the main insights gained from this activity, and so on. If you stick to such a pattern in all your meetings, a team routine emerges that all team members understand and that conveys feelings of both progress and accountability.

Do not forget about reflecting and looking back at what you have already accomplished. Especially when the number of face-to-face meetings is not very high, it is tempting to only keep pushing for next steps, activities, etc. We often take limited time resources as a sign for that we do not have time to look back. Yet, this is a fallacy: Especially when co-present time is little, it is easy to walk into different directions over time without realizing. Regular adjustment on goals and activities helps to keep a team looking in the same direction.

Action Items and Check-Out Routine

AIM. When everybody is responsible, nobody is. Similarly, when action items are not captured, they do not even really exist. While meeting formats need change and adaption, clear and repetitive structure are crucial to generate feelings of task responsibility among team members and to ensure that work gets done. You cannot expect team members to go off and work miracles on their own and in isolation. Teamwork begins in team meetings and continues on through individual activities. And for the latter, structure is needed. *Action Items* combined with a clear *Check-Out Routine* can help in that.

HOW. At the end of each meeting, ask team members to list the actions items they will work on until the next meeting. This is how team members check out of the meeting. Make sure notes of these action items are taken (including the person in charge!) and share these notes with everyone after the meeting. Team leaders should also make sure that persons in charge are able to work on assigned action items or whether they still need the help or input of other team members. Adding a quick *What I Need From You* can help airing these needs. You might also want to ask team members for additional thoughts or questions they still have to make sure everyone leaves the room with as much clarity on the next actions and the overall progress as possible.

Check-Back Routine

AIM. A team's *Check-Out Routine* should be followed by a *Check-Back Routine* in the next meeting to really be of use and avoid action items and tasks from petering out. With a clear and repetitive *Check-Back Routine*, teams can take a look back at their agreements from last time and team members can systematically be asked for updates and new insights.

HOW. In the beginning of the meeting, ask team members about updates or new insights on the action items they agreed to work on in the previous team meeting. Make sure that everyone is asked so that feelings of responsibility and accountability remain high. It might be useful to check who has most to share with the team or needs the team's help to move forward before the meeting so that you can design the agenda accordingly.

After-Action-Reflection

AIM. The *AAR* is a quick, reflective exercise for team-based learning during an ongoing project. It facilitates learning and improving from experience. An *AAR* can be a powerful tool for change, especially if performed at major project milestones as issues might surface that otherwise would remain hidden. Repeatedly using *AARs* during a project can improve communication, clarify team objectives and roles and build confidence among team members in their joint capacity to overcome challenges. Over time, *AARs* should lead to new or revised knowledge and more effective ways of working together. Please note: An *AAR* is for improving and strengthening capacity for action, *not* for assessment or reporting.

HOW. We recommend planning for *AARs* and integrating them into a project work schedule already at the start of a new, longer-term project. Set aside a small amount of time periodically. It might help planning to schedule your *After-Action-Reflection* after important milestones or activities. In your *AARs*, pose four questions to the team. For each question, collect answers and opinions from all team members and note trends that emerge.

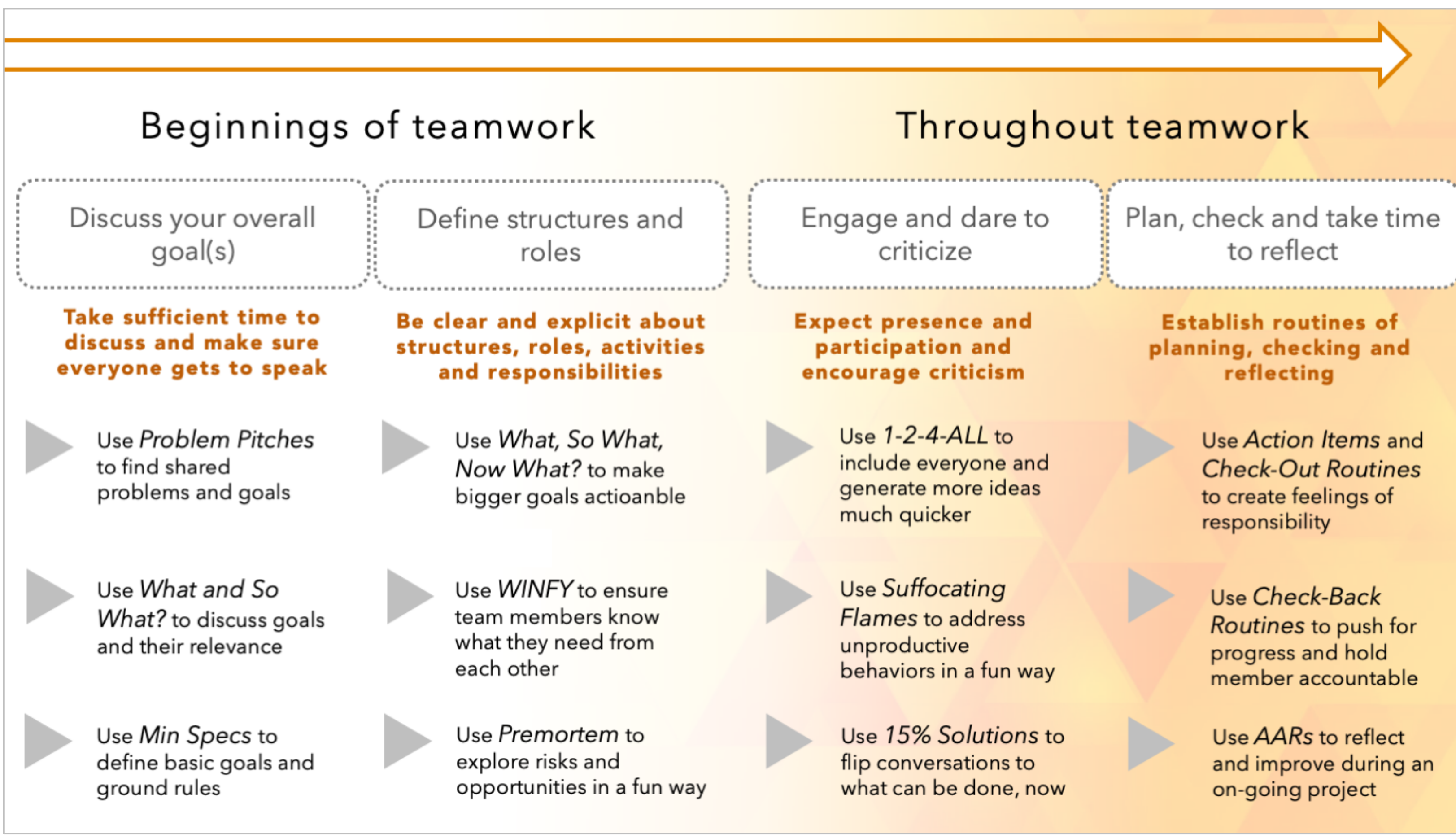
What was supposed to happen in the team?	What actually happened?	Why was there a difference (between plan and actual steps)?	What will we do next time (the same and differently)?
Brief recap of the objective: Crucial in checking the common goal!	Accounts of what happened, preferably accompanied by specific facts	Discuss reasons for the differences and identify the factors that led to success or the lack thereof	Discuss and agree on specific ideas for action that can be implemented by your team

Please note that iteration is usually necessary to put AAR-learning into practice. This means that a series of small AARs will yield more benefit than one lengthy session. Also try not to judge the value of the *AAR* method with just a single trial: It is a simple technique, but it can take time for a team to find its rhythm with it.

Summarizing insights and materials: An overview

This report described four typical meeting traps, reaching across the lifespan of a team or project. We have illustrated the importance of using initial meetings to find a shared goal or common purpose as well as to develop and establish clear structures, roles and activities. Altogether, this helps setting a proper roadmap for a team's or project's joint work. We have also shown how meetings constantly need to be managed in order to be effective: Especially during later stages of teamwork, it is important to ensure that meetings remain engaging and offer everyone the space or room needed to voice their ideas and additions, but also their concerns and criticisms. To make sure that teams progress along the plan or roadmap they set out in the very beginning of their joint work, meetings should also be used to discuss, define and check-back on the smaller actions that ultimately lead to the team's overarching goal. Hereby, proper planning is as important as reflecting on achievements from time to time: In combination, these two activities can help a team progressing and offer the needed space for adjustment and improvement on the way.

The infographic below visualizes the four meeting traps we have described in this report and very shortly summarizes our respective recommendations and proposed meeting structures or materials. It might serve as a helpful reminder and we encourage everyone to take a look at it from time to time. You might even consider printing it, so that it can remind you of the contents of this report.



How to get started

Already in the introduction of this report we have stated that testing and using the proposed alternative ways of interacting and collaborating sure takes the willingness to take small risks and suffer through a bit of anxiety the first couple of times. Immediately implementing all 12 structures in your meetings would be a tall order, thus we recommend a more processual and gradual approach: Start with one structure and give it a few trials – it often needs some iteration to feel comfortable with a structure and to be able to see and seize its benefits. Try out more structures along the way, so that your ability to use and your comfort with using them grow in parallel to your team's or project's progress.

Especially when starting to use our proposed meeting structures, it might be difficult to decide for one structure and against another. Our structures are designed in a way that they help with typical meeting issues and needs, so think about these first: What is an issue that you have seen in your meetings recently? Is there maybe something that you are frustrated with? At what stage is your team or project currently, and what would it need now to really make progress? You might want to ask these questions to your team members as well so that you can collectively decide on which structure to trial. First, this ensures that everyone has thought about an alternative meeting structure before actually testing it, breaking down at least some initial barriers. Second, adoption of a new structure might be easier and quicker when everyone has actively decided for that, rather than when a single individual imposes a structure on a team.

Note that multiple meeting structures can be used in one meeting. For example, when you have realized that motivation and engagement are dropping but frustration is increasing, you might want to start a meeting with discussing current counterproductive behaviors (using *Suffocating Flames)* and later on continue the meeting with talking about the *15% Solutions* that everyone can perform in the near future to instill a vibe of progress again. Also note that meeting structures can be used at different moments of a meeting. For example, you might want to use *1-2-4-ALL* at the very beginning of a meeting to establish high levels of engagement and energy from the start on. Yet, you might also want to use *1-2-4-ALL* as an energizer in the middle of a longer meeting. The structures we propose are designed to be flexible, so that they can be adapted to team needs and meeting goals in many ways. Ultimately, it remains the teams that have to decide about their needs and meeting goals – our structures just offer alternatives ways to fulfill these needs or achieve these goals. They are tools or means to an end, not the end itself.

Let's not forget: It's not only meetings!

"But for some participants, it feels like they're just going to be at the meeting and didn't do anything in between and still expect certain progress. And then during the meeting they contribute to getting further but when there is a request to do some preparations then it's all fine. And then they don't do things and that's really when you think, yeah, great."

-a member of the E-PLM 2.0 community

This report is all about meetings and yes, we are convinced that much can be gained from improving meeting processes and trying out new ways of working together. At the same time, though, meetings are always only as good as their preparation: If no work is done in between meetings, it is hard to design engaging and effective meetings – even with the most fun interaction structures at hand. Crucial is that commitment to team goals and an engaging team spirit is built in meetings that survives the sometimes-long time spans in between. It is important that team members find a common reason to do things, whether that is professional fun, a shared interest or a problem that has been bothering everyone for much too long already. Team members need to look in the same direction and need to show their commitment and engagement: Very often, if one member starts helping others, sharing knowledge or taking care of team tasks, then the rest follows in the same or similar footsteps. Over time, this establishes a positive sphere and an upward spiral within a team that accelerates efficiency and improves results. However, the same is true if only one team member starts behaving in ways that deviate from what would help the team, such as not showing up, endlessly postponing deadlines or not properly working on assigned tasks. Such a negative vibe spills over to team members as quick as a positive vibe, if not faster.

What we have proposed in this report thus should be considered as only a few of possible solutions and paths there are. Yes, we can continue organizing time-bound project teams and setting up regular meetings to collaborate and yes, the recommendations and interactions structures might help to use the scarce co-present time that teams have in a much more efficient and engaging manner. Yet, if we want to accelerate learning and collaboration even more, we might want to start thinking about not just alternative ways of interacting and engaging but also about alternative forms of organizing: more long-term and sustainable forms that overcome the limits of short timeframes, or forms that themselves convey an identity and structures, so that members can jump into working together much easier and quicker.

Think of continuous, multi-agent communities governed by shared value orientations and built on a single, clear and actionable purpose[5]. Members would not join such communities for pre-set timeframes but become part of a group that they can identify with on the long-term. Such a community would over time develop and establish own values, norms and identities that would together guide action in a much more synchronized, aligned and purpose-driven manner. Labor and activities would not be divided mechanically

[5] Kolbjornsrud, 2018

or through vertical dependence, but organically and through conscious collaboration, purposefully enabling connection and interdependence. The structure of such a community would neither be just local and closed (as in traditional companies or organizations) nor be completely global and open (thus accessible for everyone without any boundaries). Rather, it would combine these opposites into some form of *glocalization*: global as it would cross organizational, industrial and possibly even regional boundaries, local as it would constitute a physical hub or home with an own identity for its members. Quality checks would be less about managers or supervisors and more about peers, and rewards would take the form of mutually accessible goods or benefits. Overall, it would be less about being employees and more about being members, using shared resources to continuously work towards shared goals and values.

Examples of such forms of collaborative communities are still scarce. You might want to look to OSDD (Open Source Drug Discovery, see *www.osdd.net*) as an example of rather big community, where students, scientists, researchers, academicians, institutions and corporations work together on advancing better drugs and drug discovery. Or you might want to think about the hacker collectivist Anonymous that has managed to create a community of committed members only through the pursuit of shared goals and values. You might spot yet another example when looking at recent Fridays-for-Future campaigns and activities, where initially pupils but now also more and more other professions organize themselves to become a member of something they find important. Admittedly, these examples are not typical business examples. Yet, they all come down to a similar guiding principle: Being a member of a community that works towards a shared purpose, governed and characterized by a unique identity and own values and norms. We might not want to copy their structures and models one-on-one, but we might want to keep our eyes open for what we could learn from them.

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The photo used on the title page of this report is by You X Ventures on Unsplash.

The meeting interactions structures proposed and described in this report are (partially) based on or inspired by Henri Lipmanowicz and Keith McCandless' Liberating Structures:
H. Lipmanowicz & K. McCandless (2014). *The surprising power of liberating structures.*