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MBA
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Text

The Making Meetings Work Workbook

by Mark D. Levine

Based on the book, Making Meetings Work,
by Dr. John E. Tropman

A research paper submitted in fulfillment of the requirements for 3
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Introduction

While the origins of the first business meeting remain obscure and unrecorded, its reputation as a waste of time has been ubiquitous and longstanding. Although attitudes towards meetings do not seem to be improving, it is likely that future managers will be spending more, rather than less, time in meetings.

Traditionally, the business meeting has been viewed as an inconvenient but necessary form of control in a hierarchical structure; however, as corporate America moves to a networked, horizontal, down-sized team based structure "the meeting" is becoming the true workplace for corporate America.

My own interest in meetings grew from an appreciation of the complexity and challenges, which both meetings and decisions present. America has been an action oriented culture; perhaps, business meetings have such a bad reputation because our culture fails to take seriously the process of discussing and deciding.

Research into the process of group decisions has clarified the complexity and difficulty, which organizations face. While on the surface, people seem to make decisions based on consistent, rational, value-maximizing calculations, closer observation shows that psychological, organizational, and bureaucratic considerations often influence or even direct decisions away from rationally optimal solutions.

On an individual basis, people tend to avoid new uncertain alternatives and prefer what is known or "tried-and-true". Furthermore, group decisions produce conflict. Voting involves winners and losers, so people will tend to make choices which resolve conflict rather than provide optimal solutions. Often, we are muddling along rather than deciding.

On a bureaucratic level, decision making is complicated by the need of the organization to maintain a consistent identity of shared values, procedures and prospectives. While the goals of any organization are multiple, the overriding goal is preservation of the organization itself. In order to maintain a consistent identity, uncertainty is avoided. Change must be incremental, only marginally different from the past.

Finally, from a political perspective, decisions allocate resources and power. Interest groups within and around the organization will naturally compete and bargain for that power. This shifts the focus from problem solving to self-interest and survival. These psychological, bureaucratic and political influences on people, at times, make the process of decision making appear more chaotic rather than rational.

Given the perils associated with decision making, it is not surprising that most business organizations do not survive. In the information age, effective meetings have become a critical success factor for survival. Nevertheless, most people still view the meeting as the most despised part of business life.

Understanding Why Meetings Fail

My own interest in meetings began during a lecture by Dr. John E. Tropman at the University of Michigan. The lecture made me realize that excellent meetings are not an accident. Later, as I read his book Making Meetings Work, I began to learn the principals and tools which form the foundation for excellent meetings. I also began to appreciate some of the psychological and technical problems, which cause meetings to fail, and more closely scrutinized the meetings, which I attended and led. Even my private practice of psychotherapy was a source of data about the pitfalls of poorly run meetings. Through personal observation and reading I have concluded that many meetings fail in the following areas:

- **Failure to take meetings seriously**

This is both a structural and psychological issue. From a structural perspective, lateness, sloppy agendas, role confusion, inadequate information, useless minutes and lack of effective follow-up all undermine the meeting process.

From a psychological point of view, the belief that meetings are a waste of time undermines meaningful participation and contribution by members of the organization.

- **Meetings which are too long**

This is a natural consequence of poor structure; however, meeting length is also aggravated by what Dr. Tropman calls "decision psychosis". People have a strong tendency to avoid decisions. Team members face a dilemma. On the one hand, the culture of the organization is built upon agreement. On the other hand, decisions create conflict because they allocate resources. Often, lengthy discussion is an unconscious attempt to delay uncomfortable decisions.

- **Wandering off topic**

People often spend more time digressing than discussing and deciding. Here again, the role of the agenda is to identify what is important and how important. The team must decide what is appropriate for the meeting and what can be handled outside of the meeting. By establishing and ensuring the purpose of the meeting, the agenda supports creativity and participation.

- **Poor results**

Decisions must be converted to action. This requires a system for accountability. In meetings, the potential for misunderstanding is unlimited. Meeting minutes must be important shared documents, which inform the group about who is accountable for the actions, which their decisions produced. In this sense, meeting minutes are not only communications but also contracts.

- **Failure to improve**

Without observation and self-correction, people continue to make the same mistakes. As creatures of habit, we tend to be more comfortable with repetition rather than change. Continuous improvement requires systems to monitor both meetings and results.

- **Conversation without candor**

People in meetings often do not feel free to be truthful. While computerized group-ware has embraced anonymity as a technological solution, such solutions avoid the underlying interpersonal dynamics, which often stifle innovation, creativity, communication and vitality within the organization. Leaders of excellent meetings encourage brainstorming, bonding, validation, equality, empathy, respect and an appreciation for conflict and complexity.

- **Inadequate information**

The motto here is to get data, not just furniture, into the meeting. Team members must become aware that meetings, like a performance, begin before the curtain rises. Adequate preparation requires identifying both the players and information necessary for meaningful discussion and decision.

The Technology of Excellent Meetings

While computer technology and group-ware have been thrown into the fray as a solution, successful meetings still require team leaders and members who have enrolled in a philosophy of the meeting as a tool for creativity, innovation, communication, and action.

I found Dr. Tropman's work compelling because it offered managers a detailed and sophisticated approach to the technology and psychology of meetings. Dr. Tropman emphasizes that excellent meetings:

- Nurture creativity and innovation.
- Encourage rational analysis of all options.
- Produce quality decisions and action.

Such meetings are the result of focused attention on issues of time, purpose, procedure and process.

My own discussion of Dr. Tropman's ideas with business groups in the community convinced me that a workbook format based on Making Meetings Work could provide business managers with a useful and comprehensive summary of the principles and tools necessary to produce excellent meetings. The independent study project itself involved a detailed analysis of the mechanics and psychology of productive meetings through readings, observations of meetings, discussions with leaders in business, and participation in Dr. Tropman's seminar on meetings. I also completed a course in PowerPoint Presentations in order to more effectively format the workbook.

The intention of this workbook is to provide managers with:

- **An understanding of techniques used by meeting masters.**

Managers of excellent meetings have learned the psychological and organizational techniques, which support participation and productivity. The workbook delineates the manager's role with regard to the meeting agenda, pre-meeting communication, meeting discussions, decisions and follow-up. It provides the manager with techniques to facilitate group decisions while benefiting from the conflicting perspectives and values which members bring to each discussion. It also highlights necessary and effective psychological interventions for leading meetings including clarification, support, confrontation and conflict resolution.

- **A guide to structure their own meetings.**

Dr. Tropman organizes his approach to meetings around the "agenda bell" which divides the meeting into announcements, decisions and discussions. . This bell curve demonstrates the importance of how meetings are organized. One of his core principals is separating discussion from decision. Issues are always discussed in one meeting and decided in the next. As I later describe in more detail, discussion is often a means to delay difficult decisions. In fact all decisions are difficult for the group because decisions produce conflict. With every vote there is a winner and a loser. Also, discussion of new issues in the final third of the meeting allows for a change of environment and psychological reconciliation among members. Finally, the workbook discusses the role of reports, executive memos, and minutes.

- **A tool for analyzing decisions.**

The quality of decisions is the most important measurement of excellence in meetings. Poor decisions not only effect business results but also over time erode the vitality of the group members. Thus, meeting excellence requires continuous improvement of the decision making process. The workbook outlines and reviews Dr. Tropman's "decision rules". It discusses the hierarchy of problem formulation, option generation, decision crystallization, decision sculpting and implementation. By understanding the effective steps to decision making, the manger can improve the process as well as the decisions.

- **A system for auditing meetings and facilitating continuous improvement.**

At the end of the workbook, I have included a list of topics and questions, which guide the meeting manger in analyzing meetings. I have found this list useful in pondering the meetings, which I both attend and lead. I notice that a simple awareness of the list tends to improve my participation. As Dr. Tropman points out, "knowing that one will revisit an issue increases a commitment to quality". The questions review the elements of excellent meetings and follow the organization of Making Meetings Work with references to appropriate discussions in the text.

Organization of the Workbook

The workbook is arranged to highlight both the structural aspects of meetings and the philosophy, which supports that structure. When Dr. Tropman and I discussed the options for

printing the text, he pointed out that Microsoft PowerPoint would allow for maximum flexibility in presenting and using this material. The reader will notice that the boxed section on each page outlines the mechanics or “rules” for achieving excellence in meetings. Below each boxed section is a more detailed discussion of the organizational and psychological principles, which motivate those rules. Title boxes include page references to Dr. Tropman’s text. In addition, an IBM PC compatible disc copy of the workbook is included to facilitate note taking, outlining, slide presentations, and review of the material.

Mark Levine
September 19, 1999

Making Meetings Work

- When was the last business meeting that left you energized and inspired ?

Why Do We Have Meetings?

Meetings potentially can create more quality decisions than individuals because groups can offer:

- A broad range of expertise.
- Multiple perspectives.
- An environment which empowers individuals to achieve excellence.

Excellence is achieved through:

- Cooperation
- Expertise (skills and information)
- Preparation
- Participation
- Synthesis of multiple perspectives.
- Advancing the interest of all stakeholders.

The Principles of Excellent Meetings

- Three Characters

All meetings have a beginning, a middle and an end. (Announce, decide, discuss)

- No new business
- No more reports
- Minimal decision rework
- Positive feelings

Pages 5-11

- Performance

An excellent meeting is like orchestral performance. It includes:

- preparation of the physical setting.
- appropriate membership
- selection of pieces
- rehearsal
- a final performance.

Performance implies a flow and pace of interaction, participation and contribution.

- The role principle.

Changes in our own behavior influence the behavior of others.
Change others by changing yourself.

- Impact

The motivation for participation in meetings is impact. In order for people to make a difference through their decisions, the structure of the meetings must provide members with responsibility, authority and resources.

FOURTEEN MANAGEMENT COMMANDMENTS

Managing Agenda Organization

Managing Agenda Design

Managing Meeting Text

Managing Participant Trust

Managing Preparation

Managing Rehearsals, Performances and Audiences

Managing Emotional Elements of Meetings

Managing Tasks and Functions

Managing Conflicting Values in Meetings

Managing the Flow of Ideas and Proposals

Managing Bases for Decisions in Meetings

Managing Decisions and Choice

Managing Positions and Roles in Meetings

Managing the Evaluation Rules

Managing Agenda Organization

Pages 15-22

The Rule of Halves:

Solicit items in advance

At the half way point, the meeting master:

- Sifts**
- Desegregates**
- Sorts**

The rule of halves is an agenda preparation and organizing rule.

Agenda items are submitted by the halfway point. The purpose is to get the information and people that each item requires, at the meeting, so that maximum use can be made of the gathering point.

Sifting is the process of considering each item and assessing whether it is truly an item for the meeting. The meeting master must identify the 20% of items, which are absolutely crucial if goals are to be achieved.

Desegregating is a process of breaking items into pieces. Issues must be defined by their parts.

•**Sorting** involves identifying each item or component with one of three phases: announcement, decision and discussion.

The Two Meeting Rule:

**Discuss in one meeting, then decide in
another**

Most controversial items must be discussed first at one meeting with no decision and then must be decided at a subsequent meeting.

There is a powerful tendency to avoid decisions. Decisions involve conflict, which threatens the cohesion and stability of the group. People tend to prolong discussion to avoid the discomfort of making decisions.

Furthermore, in making decisions, the group allocates power and resources. Responsibilities are delegated, votes are cast with winners and losers. Every decision causes a breach in group unity proportional to the conflict around the decision.

Discussion heals the breach and preserves the group.

The Rule of Three-fourths:

**Send out agenda in advance
at the three fourths point**

Get material out to individuals in time for them to ponder. The rule of three-fourths is a mail out rule. Members must have adequate time to review written material before the meeting, yet the material must be fresh in their minds at the time of the meeting. People require preparation for thinking. Otherwise, much time in meetings is wasted as people engage in a kind of verbal thinking. Without prior information and preparation, people will interact before they have anything to interact about. The three-fourths point allows adequate time for preparation and is close enough to the actual meeting time to grab people's attention.

The Rule of Sixths

Time allotments for the discussion section

- One-sixth from the past,
- four-sixths from the present
- one-sixth from the future

The rule of sixths organizes the discussion section. Items to be discussed include one sixth from the **past**, four-sixth from the **present** and one-sixth from the **future**.

In general, no more than one-sixth of the discussion time should be continued discussion of items from the last meeting. This includes those issues not yet ready for decision and past failed decisions that are now looping back for further discussion. This rule allows you to monitor whether decisions are being avoided.

Similarly, the future item section ensures that people have time to think ahead about and participate in discussion of all major agenda items. This arrangement values and empowers members. Finally, thinking about things and discussing things ahead of the decision curve allows for a release of feelings into relatively benign non-decision space.

The Rule of Two-thirds

- **Warm-up**
- **Work**
- **Decompress**

Three meeting parts:

- Warm-up: Minutes and announcements
- Heavy work: decisions
- Decompression: discussion.

The middle one-third of the meeting has the quality of:

- Attention through psychological focus and physiological alertness
- Attendance by capturing late arrivers and early leavers.

Managing Agenda Design

Pages 23-27

The Rule of the Agenda Bell

- Warm-up with minutes and announcements.
- Decisions beginning with the easiest to hardest.
- Discussion utilizing the rule of sixths for past, present and future items.



Managing Meeting Text

- agenda
- minutes
- reports.

Pages 28-40

Agenda:

- Announcement
- Decisions
- Discussion

The **agenda** is the foundation for expectations. It includes the title, description and time allotment for the meeting. Think of it as a menu. It tells you what you will discuss and decide. It estimates how much time each discussion and decision should take.

Announcements include both the successful and failed implementations of prior meeting decisions. Failed implementation will loop back into the discussion section.

Minutes

- Announcements
- Decisions
- Discussions

Minutes are organized in the following way:

- Each heading in the agenda has a corresponding heading in the minutes.
- Each item in the decision and discussion section is summarized by including the options with their pros and cons.
- Decisions are included at the end of each summary and are highlighted in a box.
- Delineate delegated tasks.
- Vocalizing a summative reflection at the end of each discussion and decision insures understanding and communication among the members.

Reports

- No reports in meetings.
- Reports should be an executive summary written in the form of the option memo technique.

The status report has a long tradition and many people resist giving it up even though reports needlessly consume much meeting time.

The Option Memo Technique

- Statement of the problem.
- Statement of the options available as possible solutions.
- Analysis of these options.
- The recommendation
- Reasons for the recommendation.

This technique:

- Provides information for the range of options.
- Primes the pump or sets the level of discussion .
- Defines and clarifies the two roles of the presenter as:

Expert

Judge

- This rule distinguishes discussion of facts from discussion of recommendations.
- Reduces the need for defensiveness
- Enhances the group effort toward problem solving. The removal of errors and the overall improvement of the solution are the first steps towards high quality decisions.

Managing Participant Trust

Agenda integrity

- deal only with items on the agenda
- start meetings on time
- stay on schedule
- end on time

Pages 41-46

Members expect to be treated well, to be involved and to use their time in a productive way. The meeting master expects that the group will act in a responsible way to assist in the development of high quality decisions. Trust requires that people be treated well and have commitments to them kept. This requires agenda integrity and temporal integrity.

Agenda integrity requires that members deal only with items on the agenda. Similarly, **temporal integrity** implies that the meetings start on time, end on time and maintain the agenda schedule.

Avoid courtesy to the discourteous. Make the time and effort that people spend preparing for and come to meetings a good investment.

Pages 41-46

Managing Pre-meeting and Post-meeting Tasks

three key areas of management

- Preparation
- Follow up
- Results

Pages 47-52

Managing Preparation

- Manage the physical setting
- Manage the membership:
 - Problem knowers
 - Solution providers
 - Resource controllers
 - Decision-makers.

Before the meeting arrange one on one interactions to clarify preferences, orientations, dispositions, agenda items, feelings and potential solutions of the individual members.

Preparation management involves managing the information and the people who will be at the meeting. The rule of halves allows the meeting organizer to review potential agenda items at the halfway point to the next meeting. This method of agenda organization also allows the meeting organizer to determine who must be at the next meeting for informed discussion and intelligent decision making. Effective preparation for each individual issue demands its own mix of problem knowers, solution providers, resource controllers and decision-makers.

Meeting preparation allows us to leverage the interaction that we have with colleagues and turn it to more advantage. The advantage is not a personal one, it is a meeting advantage aimed at helping achieve high quality decisions.

Managing Follow Up

- what went right
- what went wrong
- making it better
- complimenting
- supporting
- delegating
- following up on delegated tasks

Meetings are crystallized points in a decision making process.

Managing meeting follow up blends into managing meeting preparation. The meeting master must analyze what went right and what went wrong in order to determine how to make it better.

This includes both complimenting those who have done well and supporting those who may feel defeated. It also includes delegating tasks and following up on delegated tasks. Managing follow up is a loop back to the next meeting.

Managing Results

- insure implementation
- evaluate results

Decisions in a meeting require actions by those not at the meeting. The meeting master must ensure that decisions are implemented and must evaluate the results of those decisions. Announcements focus on the implementation and results of committee decisions. Decisions with failed implementation must loop back to the next meeting for more discussion.

Managing Rehearsals, Performances and Audiences

- the performance nature of meetings
- safety through preparation.
- identify the crucial 20% of issues

Pages 53-66

Public performance means that there are audiences of which the author is taking account. It is a defined situation in which taking into account tends to mean that the member believes his or her performance is being evaluated, accessed and measured against some kind of standard. This public nature of meetings can create stress.

Audiences include observers, other members, one's self as a critical observer, and the recorded minutes.

The rehearsal / performance split highlights the performance nature of meetings. The rehearsal refers to the provision of an opportunity to experience how particular decisions, actions and points of view feel to us.

It involves provisional, recallable sharing of feelings in a private domain that does not require us to be committed to those feelings. In rehearsal, one can try out, change or withdraw a commitment without appearing to be foolish or stupid.

Rehearsals, through information and practice, allows the meeting master to identify the crucial 20% of issues for the agenda.

Managing rehearsals

Preparing for the issues

- identify
- refresh
- explore
- play
- rework

The purpose of rehearsal is to bring to the front of consciousness skills, perspectives, ideas and feelings that individuals have and allow them to refresh themselves and explore their own minds. In particular, the very difficult, complex issues often benefit greatly from rehearsal. The overall principle here is safety through preparation.

This process occurs both through one on one interaction and subcommittee interaction with the meeting master.

In a parallel vein, rehearsal also involves playing with ideas that are combinations of sequences and packages to see how they fit and what might fit better with what other kinds of ideas but in a setting that similarly does not require commitment. In rehearsal, the practice component involves seeing how particular approaches feel and seem. There is both a reworking and an addition of information. Rehearsal allows for a final product, whose feelings and ideas can then be safely shared in a public setting, which naturally involves scrutiny.

Benefits of Rehearsal

- Safety
- Creativity
- Preparation
- Communication
- Integration

Rehearsal attends to the performance nature of meetings.

Touching base through multiple interactions allows the meeting member to think through in advance what might be coming up and determine what ideas and feelings might be relevant. Feeling and ideas are brought to the forefront of consciousness. We can recall information and skills that are not readily available. In this way, both the meeting master and the members can become prepared through one on one interactions and sectional meetings.

Managing Performances and Audiences

Techniques for Establishing Safety

Techniques for Establishing Safety

- **Overstatement**
- **Preliminarity**
- **The Round Robin**
- **Brainstorming**
- Validation
- Recognizing conflict
- Equality of vocalizations
- Bonding Opposing Members.

Overstatement

Taking a more bizarre position can free the discussion from arbitrary, narrow limits.

Preliminarity

Preliminarity frames beforehand the discussion to be one of preliminary exploration of options. Such reframing lowers the threat of premature commitment and entrapment.

The round robin

This ensures wide discussion of all points of view. It also facilitates initial discussion where everyone knows where everyone else stands. In particular, it avoids the "blurt out", where towards the end of the meeting a member blurts out there intense, unknown disagreement.

Brainstorming

Here no criticism is allowed. This facilitates creativity.

Techniques for Establishing Safety

- Overstatement
- Preliminarity
- The Round Robin
- Brainstorming
- **Validation**
- **Recognizing conflict**
- **Equality of vocalizations**
- **Bonding Opposing Members.**

Validation

This recognizes the self as a critical audience. Validation enhances members' sense of legitimacy and therefore facilitates the members' participation and expression.

Recognition of unarticulated operating conflict and complexity

Ask the question "From your point of view, what might other sides be?" By having one member articulate the opposing points of view, one not only gives information to other members in the group but creates equality of vocalizations.

Equality of vocalizations

In public venues, what is vocalized is often thought to be true. Balanced discussions need to have balanced vocalizations. The greater the uncertainty, the greater the danger of being trapped into positions of which you do not really approve.

Bonding of opposing members

Subcommittees and task forces are effective devices for bonding

Managing Emotional Elements of Meetings

- **Releasing Negative Affect**
- **Building in Positive Affect**

Pages 67-77

The purpose of managing emotions in meetings is the coupling and decoupling of affect from ideas.

A positive outlook tends to be linked to positive results.

Meeting masters release negative affect and facilitate positive affect.

Releasing Negative Affect

- Blocking hostility
- Interrupting negative patterns
- The angels advocate
- Monitoring context
- Sequence.
- Distinguishing hostility from negativism.

•Blocking hostility

The meeting master protects and shields members from psychological harm.

•Interrupting negative patterns

This involves the use of timing, structure or humor to disrupt developing patterns of hostility or negativity.

•The angels advocate.

Balancing the negativism of the devils advocate by inviting or sharing positive ideas.

•Monitoring context

Negative context tends to be stronger than positive context since attention is selective and is more strongly influenced by the negative. Thus, the positive and negative are not equally balanced. It takes fewer negative points to derail a new proposal than positive points to put it over.

•Sequence

Sequence tends to have a controlling influence. If a new proposal follows a negative context, its appeal is diminished.

Releasing Negative Affect

- Distinguishing hostility from negativism.
- Separating content from process
- discern the emotional state of the members
- Structure reduces stress

•Distinguishing hostility from negativism.

Hostility is directed towards persons. Negativism is directed towards proposals

•Separating content from process.

Underneath a hostile comment, there is a good point about the proposal in question. The meeting master must unpack the affect from the idea. Often, they can validate the speaker for their idea while blocking a hostile process.

•Discern the emotional state of the members

Meeting masters will come to meetings early to discern the emotional state of the members. Sometimes acknowledging someone's negative feelings or facilitating the ventilation of negative affect resolves their negativity.

•Structure reduces stress

Structure tends to reduce stress and allow for the management of negative affect. The rules of one-half, three-quarters, one-sixth and two meetings, in conjunction with appropriate interventions, controls stress.

Building in Positive Affect

- Socializing
- Positive expectancy
- Reinforcing positive results
- Empowering people

- Socializing

Utilize socializing and extra curricular activity to enhance positive associations to the group itself.

- Positive expectancy

Nurture an attitude of positive expectancy. Establish beliefs, which supports the ideas that the meetings will have an impact through positive results.

- Reinforce positive results

Utilize showcasing to reinforce positive results. Announcements and validation of individual members are particularly effective in this regard.

- Empower people

Create conditions that allow for active participation.

Building in Positive Affect

- Equality and equity
- Creativity
- Affect

- Equality and equity

Equality for persons, equity for issues. People are treated equally with acknowledgement for their expertise and investment. Issues are treated in accordance with their importance. Monitor who participates. Enhance the under participator and control the over participator.

- Creativity

Creativity is the central part of psychic income. Positive psychic income drives attendance.

- Affect

We do what makes us feel good and this must be operationalized., Facilitate a positive climate through showcase, reward, validation , laughter, and avoidance of bad feelings.

Managing the Flow of Ideas and Proposals

- Encourage Multiple Perspectives
- Establish time parameters
for discussion, decision and implementation.

Pages 78-84

The problem must be structured such that people have the right to be wrong. It must be possible to take a variety of points of view without intellectual self-incrimination.

There must be a way to stop discussing. The agenda schedule and techniques such as the round robin create a natural stopping point. Similarly, time parameters facilitate a useful focus for decision and implementation.

Managing Bases for Decision in Meetings

- Why do we avoid decisions?
- What makes a decision legitimate?

Pages 85-93

Why do we avoid decisions? In order to make effective decisions the group must be cohesive and confident; however, every decision threatens the cohesion of the group by creating conflict and factions. Similarly, every decision threatens the confidence of the group through the possibility of failure.

Every decision creates emotional conflict. Decisions allocate goods and recognition. They fulfill different interests. With each decision there is a winner and a loser.

Finally, even when decisions are made they often fail in the implementation phase. Successful implementation requires that the decisions have legitimacy. In this next section, we discuss the decision rules, which are the internalized norms that make a decision legitimate. Legitimacy maintains group cohesion, overcomes the fear of failure, and provides authority for implementation.

The Six Decision Rules

- **extensive**
- **intensive**
- **involvement**
- **expert**
- **power**
- **negative**

•The **extensive** decision rule.

One person, one vote.

•The **intensive** decision rule.

The distribution of impact and affect among those affected by the decision.

•The **involvement** rule.

Who carries the responsibility of implementation?

•The **expert** rule

Recognizing knowledge and experience.

•The **power** rule.

What do influential people desire?

•The **negative** decision rule.

Change is perceived as being a threat. Negativity has inertia behind it.

Decision Rule Lock

- one rule neutralizes the others
- the unconscious nature of rules

Decision rule lock occurs when the results, that would be produced by the application by any one rule neutralizes the results of the applications of other rules, and stalls the decision. When a candidate decision can meet and be shown to meet three or more rules, the likelihood of a “go” is high. If it is under three, the likelihood of a “stall” is high.

The difficulty is that individuals are not always aware if a rule has been satisfied because of the deep structure (unconscious) nature of the rules. Thus, the use of decision rules by members and chairpersons is extremely useful. In order to proceed with a decision, all members must be satisfied that there is sufficient confluence of rules. Vocalization of the state of rules confluence facilitates this awareness.

Managing Decision and Choice

- **The Decision Mosaic**
- **Decision Crystallization**
- Initial discussion
- Summative Reflection
- Action hypothesis
- Re-discussion
- Decision Sculpting

Pages 93-99

The Decision Mosaic and Its Determinative Element

The decision mosaic is the larger picture of the decision process. It consists of multiple decision elements. In the decision mosaic is the central decision, which tends to define the position of all others. Its influence is asymmetrical. Once the determinative element has been decided, all other decisions are formed around it.

Decision Crystallization

Webster defines the word “to decide” as follows: “ from the Latin verb *decidere*, to cut off from.” To decide is to commit to a course of action. To decide is to cut one’s self off from all other possibilities. Thus, decision crystallization is the psychological moment in time in which all the pieces of information are put together and the group commits to a course of action.

Managing Decision and Choice

- The Decision Mosaic
- **Summative Reflection**
- Decision Crystallization
- **Action hypothesis**
- **Initial discussion**
- Re-discussion
- Decision Sculpting

Initial discussion

Discussion starts with a round of discussion in which each member has an opportunity to discuss the options under consideration. The closing of a round is a psychological moment in decision management, which ends discussion. The chair must assess which decision rules apply, consider how substantive options under discussion might be harmonized, and scan for under participation. Is the discussion open and inclusive?

Summative Reflection

Summative reflection pulls together the key points made by the various members in summary form. It neutrally organizes and lays out where the group has been. All alternative options must be vocalized.

Action hypothesis (Risky Shift)

The action hypothesis consists of two parts, substantive suggestion and legitimization. **Substantive suggestion** must be tentative but offers the recommendation and the reasons for that recommendation. It presents the possibility of a decision. Here the decision crystallizer vocalizes a suggestion for action. **Legitimization** provides the justification for the decision based on decision rules.

Managing Decision and Choice

- The Decision Mosaic
- Summative Reflection
- Decision Crystallization
- Action hypothesis
- Initial discussion
- **Re-discussion**
- **Decision Sculpting**

Re-discussion

If consensus is not reached based on the decision rules then a new round of discussion begins. The key here is to hold back on the most popular alternatives in the last round in order to allow individuals to think fresh and creatively so that the ensuing discussion may seek to uncover new approaches rather than simply restate the old ones.

Decision Sculpting

Decision sculpting involves examining and reevaluating how the decision fits into the decision mosaic.

Managing Solutions: The Problem Solving Model

- | | |
|--|---|
| <ul style="list-style-type: none"> • Problem formulation • • Option generation • Option Reduction • Decision Crystallization | <ul style="list-style-type: none"> • Decision • Re-discussion • Decision Sculpting • Implementation • Evaluation and recycle |
|--|---|

•Problem formulation

- Get input before and during the meeting from the problem knowers. This input from the problem knowers is the evidence, which must be discussed

•Option generation

- Begin with the recommendation:
 - Is it **logical**?
 - Does it show good **judgement**?
 - Can you make it **better**?
- Generate as many options as possible.
- Scan for participation and inclusion of ideas.
- Avoid destructive opposition.
- Clearly establish that decisions are the intended outcome. Use oppositional ideas to enhance proposed solutions. Separate affect from the information. Oppositional ideas allow us anticipate potential problems and build solutions into our decisions.

•Option Reduction

- Aim for three to five. Utilize voting but include the decision rules in the process of reduction. Harmonize as well as eliminates options.

Managing Solutions: The Problem Solving Model

- | | |
|---------------------------------------|--------------------------|
| • Problem formulation | • Decision |
| • Option generation | • Re-discussion |
| • Option Reduction | • Decision Sculpting |
| • Decision
Crystallization | • Implementation |
| | • Evaluation and recycle |

•Decision Crystallization

1. Summative reflection

- neutrally vocalize options with pros and cons

2. Action Hypothesis

- the recommendation
- the reasons for the recommendation
- Justification of the recommendation based on decision rules

•Decision

Once a vote is taken and the decision is made, the chairperson must review and vocalize the reasons for the decision in order to unify and motivate the group behind its commitment.

Managing Solutions: The Problem Solving Model

- | | |
|-------------------------------|-----------------------------------|
| • Problem formulation | • Decision |
| • Option generation | • Re-discussion |
| • Option Reduction | • Decision Sculpting |
| • Decision
Crystallization | • Implementation |
| | • Evaluation & recycle |

Re-discussion

If a vote is taken and the recommendation is rejected, then the group must look again at the alternatives available. They should hold back on the most popular alternatives and attempt to think afresh and creatively, seeking to uncover new approaches rather than simply restating the old ones just rejected.

Decision Sculpting

Decision sculpting involves stepping back and taking a look at the whole picture in order to take care of and account for all the different interests. In our attention to single items we may overlook the shape of the whole. Decision sculpting is a time for correction.

Implementation

The action plan must include who, what, when and how .

Evaluation and recycle

Failed implementations will later be reassessed as discussion items.

Managing Positions and Roles in Meetings

- Positions are official responsibilities
- Roles are types of behavior

Pages 100-111

Questions to consider:

What is the purpose of the group?

Will I have the resources to fulfill these expectations?

Will the structure of the group allow the expected results?

Do the agenda items, in operating style, support the purpose of the group?

Can I neutrally facilitate a range of points of view and persons into the discussion?

Responsibility

- The Chair
- The Members

Guidelines for the Chair

The chairperson facilitates the entry of the range of points of view and persons into the discussion. Authoritative augmentation requires a change of orientation to state-personship because the position of chairperson carries extra influence. State-personship requires the chair to:

- Use interrogative techniques with open-ended questions.
- Maintain responsibility to model good meeting behavior.
- Protect the weak and keep the strong under control.

Guidelines for members

- Be prepared.
- Maintain average participatory level (credibility is a function of appropriate participation). The group establishes a norm of acquiescence and judges people accordingly.
- Aid the chair
- Don't dump on the group but rather provide a solution as well as a question when raising problems with a proposal.
- Provide support through listening, attention and validation.

Types of Behavior

- Leadership
- Followership

Leadership

Leadership involves risk taking, not for personal gain but for the benefit of the group and the community. Leadership involves not only creating possible futures but also inviting others to join in creating that future. One cannot chase someone into the future; therefore, leadership involves creating a vision and the conditions for participation. It means maintaining a level of excitement. In other words, leadership means vision, involvement and contribution. Finally, leadership is not restricted to the chairperson role, leadership must float among the members.

Followership

The idea is to alternate between leadership and followership. This allows the group to draw on its diversity of expertise. Also, sharing leadership empowers and inspires the members. Finally, there is no leading without the support of followers. Leadership and followership are in a nurturing equilibrium.

Managing Tasks and Functions

- Intellectual Environment
- Interpersonal Environment

Pages 112-119

The goal of every meeting is decision. Quality decisions are a consequence of a quality process. Quality process means attending to the intellectual and interpersonal environment of the group.

Intellectual Environment

The meeting master facilitates an excellent intellectual environment by :

- The development and encouragement of **new ideas** within the meeting framework.
- The questioning and testing of **old ideas** and the assumptions upon which they are based.

Interpersonal Environment

The goal here is to nurture interpersonal interactions to create an environment which:

- Fosters individual **innovation** and **creativity**
- Transforms individual creativity to **group creativity**.

Blocking Negativity

- Ventilation
- Validation
- Angels Advocate
- Blocking Hostility

The meeting master must prevent negative interactions among group members from blocking the growth of the group. The following techniques address negative interactions:

- Ventilation

To the extent that negative feelings are present, information can become irrelevant. Ventilation is a key process for separating affect from ideas.

- Validation

Validation allows the participant to separate feelings from issues. Recognition of the validity of a feeling validates the members' identity and frees them to connect to others through negotiation and compromise without giving up their identity.

- Angels Advocate

As noted before, this involves protecting the weak and controlling the strong.

- Blocking Hostility

The meeting master has a unique responsibility for disrupting hostile interactions, which interfere with group cohesion, innovation and creativity.

Managing Conflicting Values in Meetings

- The goal of conflict management is victory for people with differing perspectives.

Pages 120-127

Value Finessing

Value finessing recognizes that people simultaneously hold conflicting values. One may maintain a given value in general but apply an opposing value in a specific instance. Hence, the individual is not being asked to give up anything but alternatively is asked to invoke something that is already present within himself. Here the meeting master reframes the situation from that of conflicting values to a simple change in priority based on altered context. By changing the focus from “in general” to “in this specific instance” the meeting master is able to enhance the other value that the individual holds.

In order to successfully finesse values, the meeting master must first validate each member's values. Then, the member becomes free to recognize the value that they themselves place on organizational purpose. The meeting master can then reframe from the perspective of “in general” to the perspective of “in specific”. The reframe allows each member to place their commitment to personal purpose in the context of organizational purpose.

Managing the Evaluation Rules

- **Monitoring**
- **Oversight**
- **Appraisal**
- **Decision Autopsy**

Pages 128-140

The Evaluation Process

The evaluation process involves monitoring, oversight, assessment and appraisal.

- Monitoring structure

Start and end time
Agendas
Minutes
Reports

- Oversight

Oversight refers to checking against standards.

- Appraisal

This involves midcourse and end of year examination of data from monitoring, oversight and the decision autopsy.

- The Decision Autopsy

Evaluate a selection of decisions by asking the following questions:

- In what way did this decision work?
- In what way did this decision not work?
- What would make this decision better?
- How can we improve the process by which this decision occurred? (This question will involve utilizing data from the monitoring and oversight sections.)

Evaluation as A Salutory System

- People feel good when they get work done

- The presence of decision review maintains a focus that the purpose of the meeting is decisions.

- The evaluation process puts oversight in the minds of members and creates an awareness about quality. Knowing that one will revisit an issue increases a commitment to quality.

Tools for Practice

- The Problem Solving Model
- Meeting Questions

On the following pages you will find a convenient summary of the Problem Solving Model to prepare yourself for meetings.

You will also find a list of useful questions for the evaluation of your meetings.

The Problem Solving Model

1. Problem formulation
 - Get input before and during the meeting from the problem knowers. This input from the problem knowers is the evidence, which must be discussed
2. Option generation
 - Begin with the recommendation:
 - Is it **logical**?
 - Does it show good **judgement**?
 - Can you make it better?
 - Generate as many options as possible.
 - Scan for participation and conclusion of ideas.
 - Avoid destructive opposition.
 - Clearly establish that decisions are the intended outcomes. Use oppositional ideas to enhance proposed solutions. Separate affect from the information. Oppositional ideas allow us to anticipate potential problems and build solutions into our decisions.
3. Option Reduction
 - Aim for three to five. Utilize voting but include the decision rules in the process of reduction. Harmonize as well as eliminates options.
4. Decision Crystallization
 1. Summative reflection
 - Neutrally vocalize options with pros and cons
 2. Action Hypothesis
 - the recommendation
 - the reasons for the recommendation
 - justification of the recommendation based on decision rules
5. Decision

Once a vote is taken and the decision is made, the chairperson must review and vocalize the reasons for the decision in order to unify and motivate the group behind its commitment.
6. Re-discussion

If a vote is taken and the recommendation is rejected, the group must look again at the alternatives available. They should hold back on the most popular alternatives and attempt to think a fresh and creatively, seeking to uncover new approaches rather than simply restating the ones just rejected.
7. Decision Sculpting

Decision sculpting involves stepping back and taking a look at the whole picture in order to take care of and account for all the different interests. In our attention to single items, we may overlook the shape of the whole. Decision sculpting is a time for correction.
8. Implementation

The action plan must include who, what, when and how.
9. Evaluation and recycle

Failed implementations will later be reassessed as discussion items.

Meeting Questions

1. Managing Agenda Organizations
 1. Did the chairman solicit items in advance?
 2. Did the chairman decide which items are in the meeting and which are better handled outside of the meeting?
 3. Did the chairman sort decisions items from discussion items?
 4. Are items discussed in one meeting then decided in the next?
 5. Did the chairman mail out the agenda ahead of time?
 6. Are appropriate time allotments made for past, present and future issue discussions?
2. Managing Agenda Design
 1. Does the meeting have three clearly delineated parts, announcements, decisions, and discussions?
 2. Are decisions made in the middle third?
 3. Do discussions occur in the final third?
3. Managing Meeting Text
 1. Is there an agenda and minutes?
 2. Do the minutes reflect the agenda?
 3. Are all reports written using the option memo technique?
4. Managing Participant Trust
 1. Does the chairman:
 - A. keep to the agenda?
 - B. stay on schedule?
 - C. treat people well?
 - D. insist that others treat people well?
5. Managing Preparation
 1. Is the physical setting appropriate?
 2. Are the necessary members there?
 3. Have the subcommittees met?
 4. Did the necessary one on one conversations occur?
 5. Did the members complete delegated tasks?
 6. Do we analyze our meetings?
 7. Do we assess implementation?
6. Managing Rehearsals, Performances and Audiences
 1. Has the chairman touched based with people to clarify preferences and potential solutions?
7. Managing Emotional Elements of Meetings
 1. Does the chairman facilitate the release of negative affect?
 2. Does the chairman build in positive affect?

8. Managing Tasks and Functions
 1. Does the chairman encourage new ideas, and question old ideas?
 2. Does group creativity occur?
9. Managing Value Conflict In Meetings
 1. Does the chairman resolve conflicts in values between individual members in the group?
- 10A. Managing the Flow of Ideas
 1. Is there a timeline for discussion, decision and implementation?
 2. Does the chairman encourage multiple perspectives?
- 10B. Managing Decision and Choice
 1. Does the manager utilize the problem-solving model? Including:
 - a. Problem formulation
 - b. Timeline
 - c. Option generation
 - d. Option reduction
 - e. Decision crystallization
 - f. Decision or re-discussion
 - g. Vocalization of the reasons for the decision
 - h. Decision sculpting
 - i. Defining the implementation
 - j. Evaluation of the implementation
11. Managing the Evaluation
 1. Does the group monitor the structured meetings (time, agenda, minutes and reports)?
 2. Does the group monitor the quality of meetings?
 3. Does the group monitor the quality of decisions?
 4. Does the group monitor all the elements of the meeting process?

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