

# LCI COMMUNITIES OF PRACTICE



- Lean Meetings
- Collaborative Leadership Fundamentals
- 13 March 2019

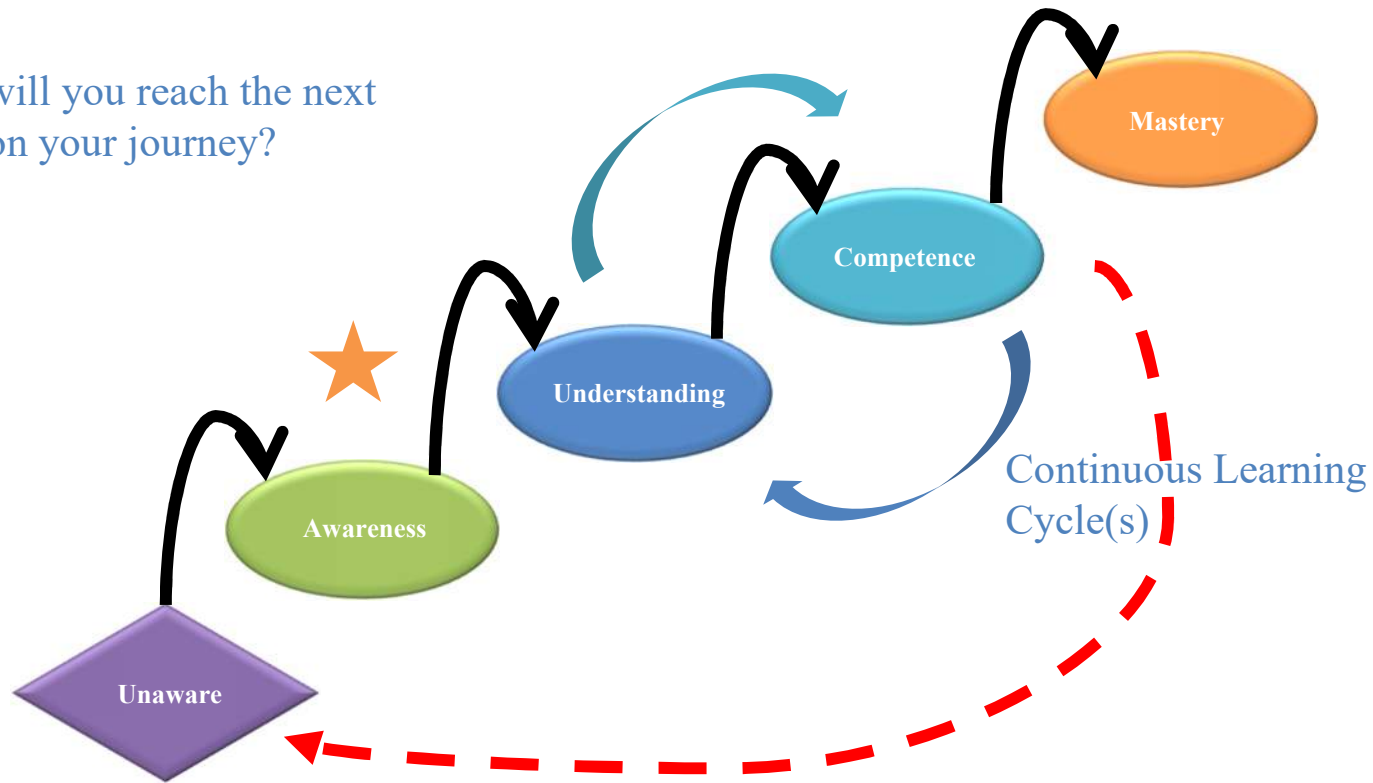
## Meeting Purpose

- To provide and new perspective on project-related meetings as critical opportunities to model collaborative leadership, engage stakeholders, gather information, define and solve problems, develop and execute plans....
- So that you can eliminate or transform waste in meetings, generate increased value, and build you Lean culture
- Meeting Type: Information Giving

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## Lean Journey to Competency

How will you reach the next level on your journey?



## Desired Outcomes

- Have understood a key root cause of problems with meetings
- Have defined Facilitative Leadership and the business case for Lean Meetings – understand critical importance of meetings
- Be introduced to a broad range of tactics to improve meetings and collaboration at many levels
- Have an overview of the “5 Keys for Collaboration” required to master Lean Collaboration
- Have reviewed options to build your skills

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## Agenda

TOPICS	HOW	WHO	TIME
Purpose, Desired Outcomes, Agenda, Ground Rules	Present with Q&A for clarification Check for Agreement	V. Ortiz All	10 Minutes
Problems with Meetings & Root Cause Basic Meeting Best Practices Definition of Facilitative Leadership	Brainstorm and Demonstrate Review and Discuss Presentation, Q&A	V. Ortiz (facilitator) All V. Ortiz	40 Minutes
The 5 Key Collaboration Skill Sets you need to master to transform your meetings  Sample Best Practices Assessment Form	Review, Discuss, Q&A	V. Ortiz	15 Minutes
Key Take-aways, Agreements on Assignments for Session 2	Discuss and Capture Outputs Practice Active Listening Plus-delta Analysis	All V. Ortiz (facilitator)	15 Minutes

## Two Modes of Listening

- The “Agree / Disagree” Mode (usually unconscious, automatic)
- The “Listening to Understand” Mode (requires conscious choice and intentional use of specific listening behaviors)

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## Operating Agreements

- Participate: share responsibility for value creation
- Mute phone/mic when not speaking, use chat, raise hand or unmute to respond to questions
- Speak your truth, take some personal risk
- Listen first to understand before you agree or disagree
- Make sure we accurately hear/record your input
- Support the agenda, be willing to defer a topic as needed (use the “Open Issues List”)

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## Lean:

Culture of respect and continuous improvement, and an operations strategy aimed at creating more value for the customer while identifying and eliminating waste.

## Lean Project Delivery System:

A systematically organized implementation of Lean Principles and Tools that allow a team to operate in unison to create effective production through improved flow.





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- If you don't need the combined brainpower of other people, why are you having a meeting? (Muda #8)
- If you need the brainpower, buy-in, commitment and wisdom of other stakeholders, how does your meeting process support or undermine true collaboration?

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## Brainstorming Exercise (12 examples in 5 minutes)

PROBLEMS WITH MEETINGS	P/C

## Definitions

CONTENT	PROCESS
Meeting CONTENT refers to the subject matter or topics to be addressed (WHAT)	Meeting PROCESS are the methods or steps that define how the meeting participants will address the content (HOW)

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The root cause of waste in meetings (and projects) is  
“Process Blindness”

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## High-Performance Team Characteristics



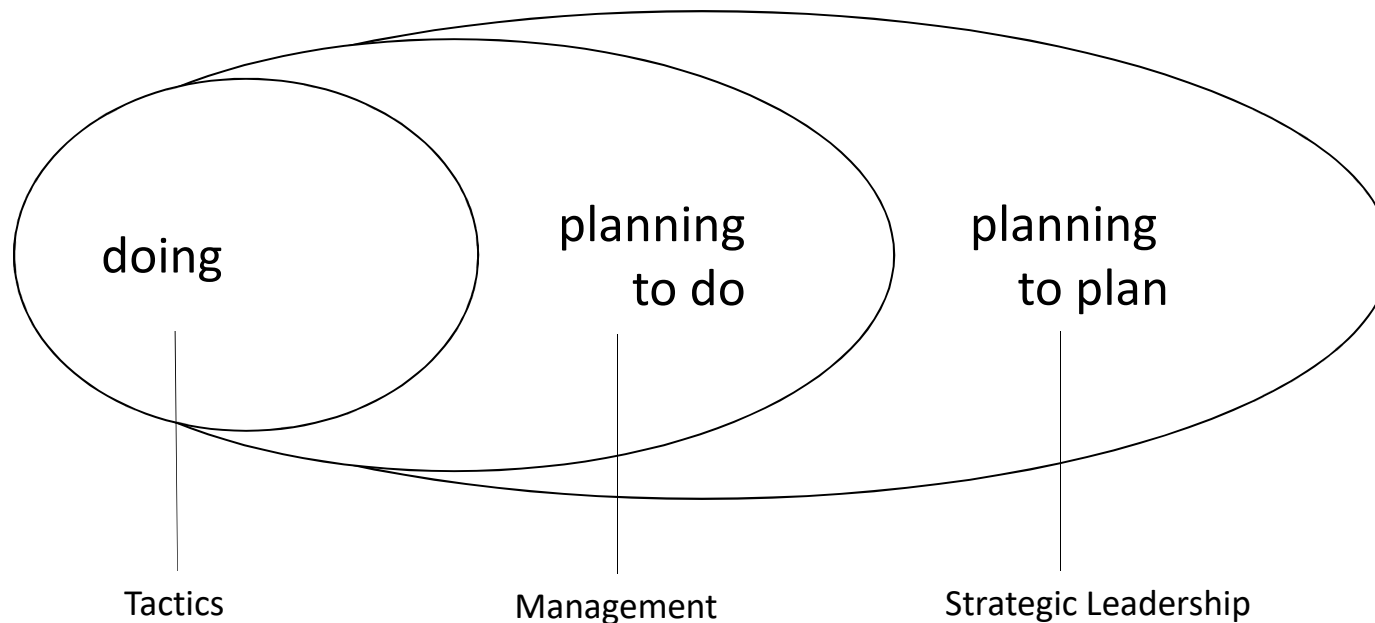
- Inclusiveness and Involvement
- Team Management Excellence
- Self Management and Motivation
- Creativity
- Technical Excellence
- Authority to Take Action

## 5 Keys for Collaboration

1. Facilitative Leadership Skills
2. Meeting Planning, Management & Logistics
3. Stakeholder Analysis and Engagement Strategies
4. Collaborative Problem Solving
5. Collaborative Decision Making

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At what level are you managing and leading?



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The only legitimate reason for Management to exist is to enable the success of the organization and everyone in it!

- Russell L. Ackoff, "Ackoff's Fables"



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## Leadership Paradigm Shifts

FROM 'COMMAND AND CONTROL'	TO 'ENABLE'
span of control	span of support
content focus	content and process
win/lose tactics	win/win strategies
dominating	enabling
controlling	empowering
repressing and denying	legitimizing and probing
criticizing	informing
withholding	promoting
reaction and hindsight	vision and planning

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- Management is about creating stability
- Leadership is about disrupting the existing order

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## Perpetual Paradox

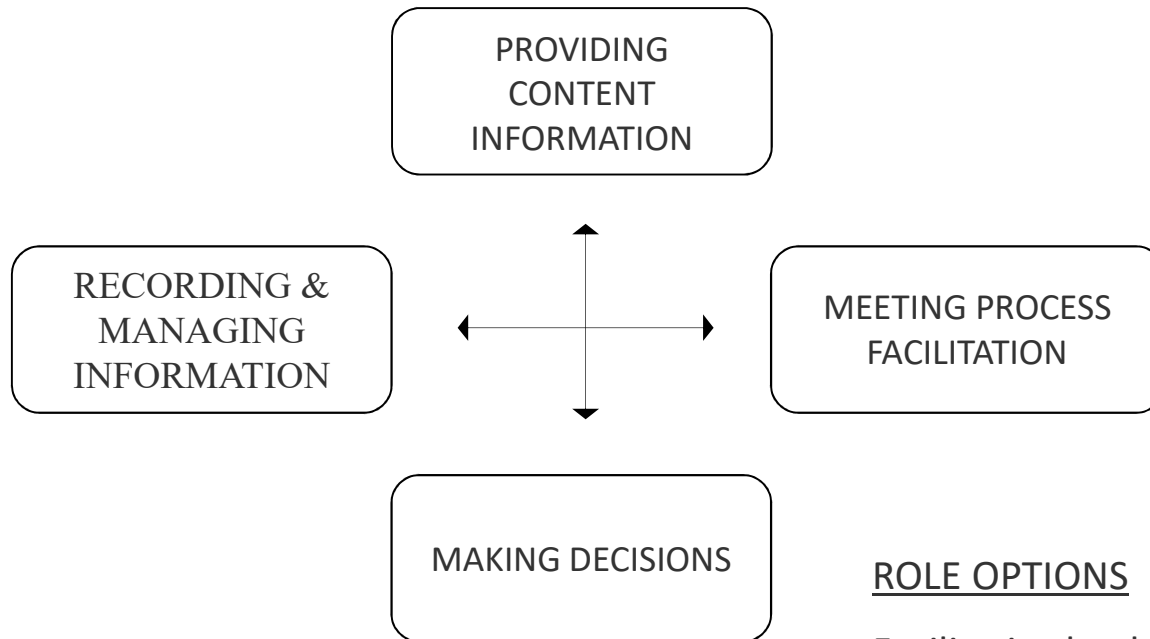
Manage  
Knowing Culture  
Push  
Content Focus  
Reduce Variation  
Reduce Risk  
Control Cost  
Build Your Brand  
Deliver Value  
Git 'er Done



DYNAMIC BALANCE

Lead  
Learning Culture  
Pull  
Process Focus  
Induce Change  
Innovate  
Invest Wisely (e.g., in training)  
Be Transparent  
Reduce Waste  
Plan to Plan

## Meeting Functions & Roles



### ROLE OPTIONS

Facilitative leader / group members

Facilitative leader / recorder / group members

Leader / neutral facilitator / recorder / group members

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## Best Practices for More Effective Meetings

Before – During - After

## Before Meetings

- Be sure the meeting is really necessary
- Get input on outcomes, agendas, schedules, etc.
- Invite the right people
- Send out the proposed agenda and any suggestions for preparation needed by participants in advance of the meeting
- Confirm meeting supplies and equipment needed are available and operating properly
- Prepare handouts and visual aids as necessary-put the proposed outcomes and agenda on a flip chart or into a computer meeting file, create action item and open issue list templates, etc.
- If needed, have advance meeting/conversations with key players

## First 5 Minutes

- Start on time
- Welcome participants and do introductions as needed
- Review, upgrade and get agreement on:
  - The Meeting purpose, desired outcomes and agenda
  - Meeting roles and operating agreements/ground rules
  - How decisions will be made
  - Stopping time, logistics, etc.
- Identify and list any additional participant expectations not anticipated during the agenda development and decide whether to make last minute agenda changes, or add the unplanned expectations to the open issues list
- Make a clear transition into the first agenda item

## During Meetings

- Think of the meeting as a succession of plays in a football game: each new topic or process should be preceded by a quick “huddle” to agree the way forward
- Actively listen to make sure there is:
  - Agreement on the current topic (content agreement)
  - Agreement on how the topic will be addressed (process agreement)
  - Adherence to the agreements
- Keep focus by referring to the agenda or “group memory” (take notes on flipcharts or a projected computer screen, etc.)
- Make sure people get heard and issues dealt with; don’ t “open too many boxes” at once – close them one at a time
- Use:
  - Facilitative behaviors
  - Active listening techniques
  - Conflict Management techniques
  - Problem-solving tools

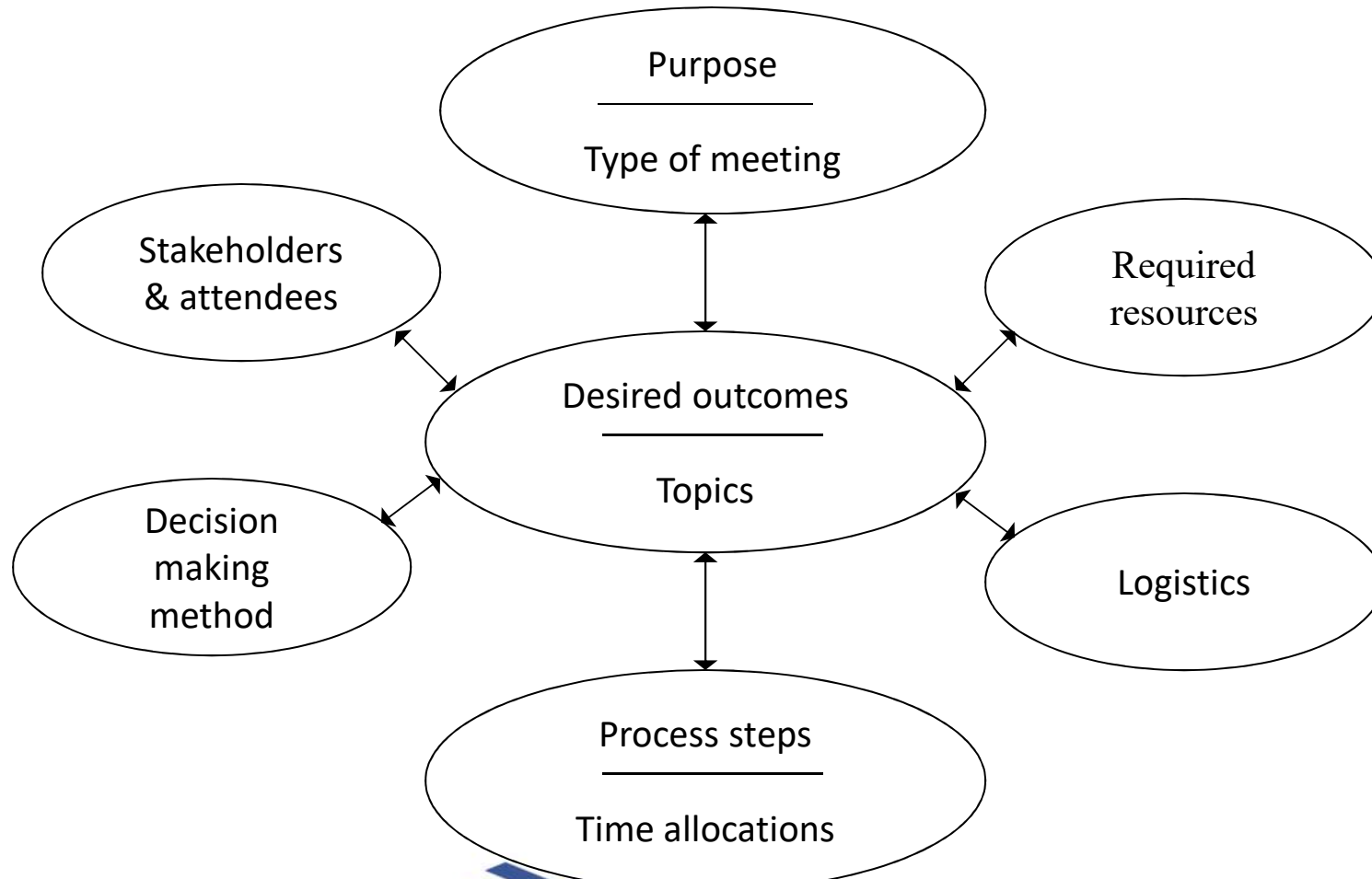


## Closing Meetings

- Briefly review your results relative to the originally agreed desired outcomes and agenda and make sure you have captured
  - Agreements
  - Open Issues
  - Action Items
- List items for the next meeting's agenda
- Do a meeting process evaluation (+/Δ, or similar)
- Check for key “take-aways”
- Acknowledge: participants, good things that happened, progress toward goals, etc.
- Review the “group memory” (meeting notes) from the flip charts or computer projector, organize them, prepare them for transcription (if on flip charts), add language as needed to format into useful minutes, etc.

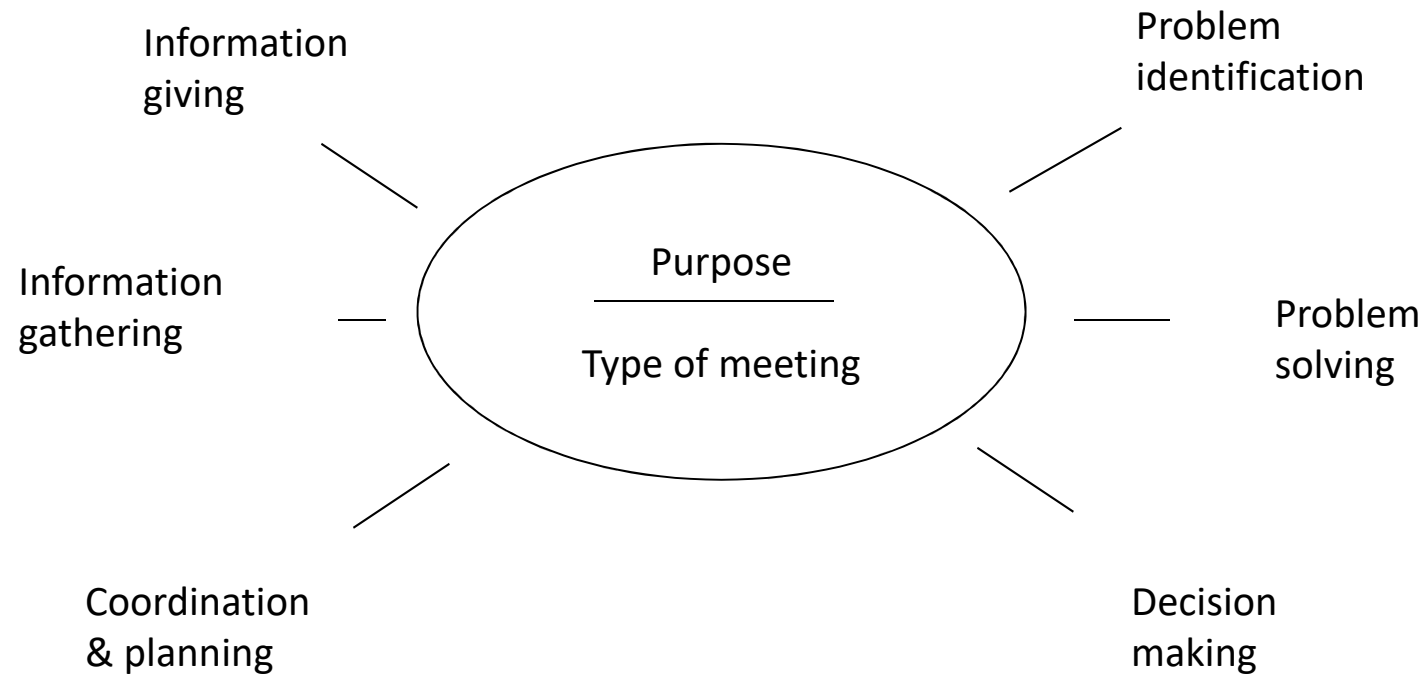
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## Agenda planning: pieces of the puzzle



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## Types of Meeting Activities Vary with Purposes



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## Meeting agenda template

What (topic, D.O)	How (process)	Who (responsible)	Time / Duration)
Context & desired outcomes	Present & agree	Joe Smith	8:00 a.m. to 8:05 a.m. 5 minutes
Topic #1			
Meeting wrap-up & close-out	Plus – delta analysis		

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## Example: Weekly Work Plan Meeting

Topic	Process	Who	Time
Desired outcomes, agenda	Present Q/A for clarification Check for agreement	Dave K.	5 minutes
Status of last week's commitments	Review, Update ID Plan Failure Reasons	All	10 minutes
Plan Failure Causes and Response	ID Root Causes List Corrective Actions	Dave/All	10 minutes
6-Week Look-Ahead Plan	Update, Optimize, Agree	All	60 minutes
Upcoming Week Task Commitments	Review, Optimize, Agree	All	20 minutes
Wrap-up	Review list of actions Confirm Commitments Plus / Delta	Dave/All	5 minutes

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## Meeting Process Options

Create	Organize/Evaluate	Decide
Present	Categorize	Decide
Q&A	Affinity Diagram	Build up/Eliminate
Questions for Clarification	Prioritize	Check for Agreement
Brainstorm	Diagram	Apply Criteria
- use Post-Its, Charts	Sequence	Poll
Discuss and List	Model and Run	Straw Vote
Review and Upgrade	Combine/Enhance	Negative Vote
Clarify / Differentiate	5 Why's	Vote
Dyad/Triad Discussion	Criteria Matrix	Create Win/Wins
Allow "Think Time"	Discuss/Explore	Agree to Try
Draw a Picture	Best/Worst/Most	Agree Fallback Options
Guided Fantasy	Probable	Back off/delay
Fishbone	Advocate	Delegate
Idea Generation Matrix	Advantages/	CBA
Small Groups/Report Out	Disadvantages	
	Plus/Delta	

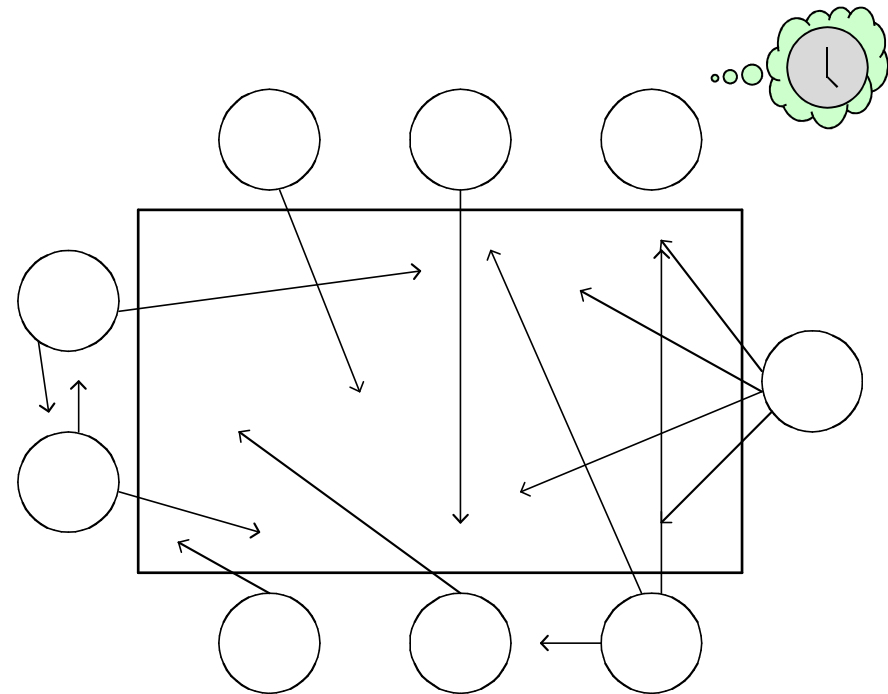
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Review MS Word Template



# LCI COMMUNITIES OF PRACTICE

## Typical conference room setup

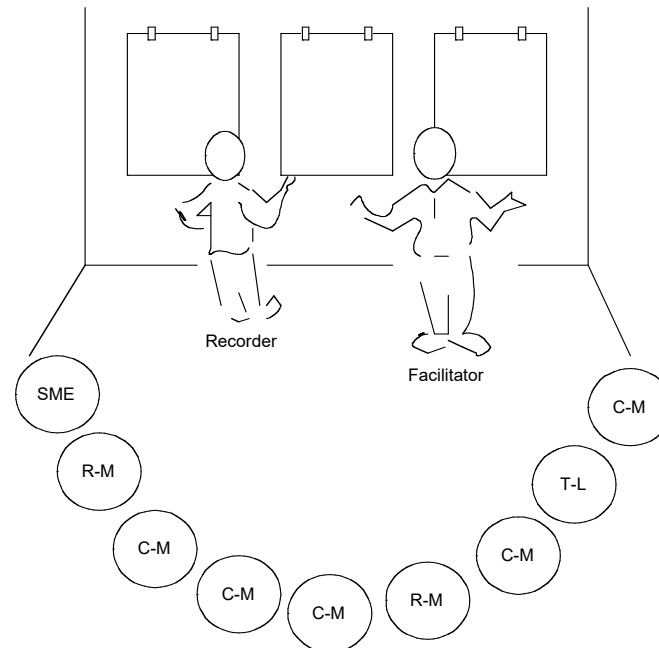


Where is the focus?



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## Meeting logistics – Preferred room layout



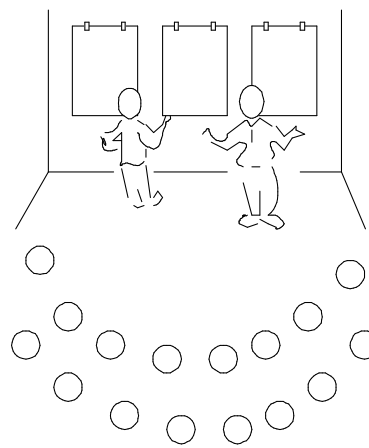
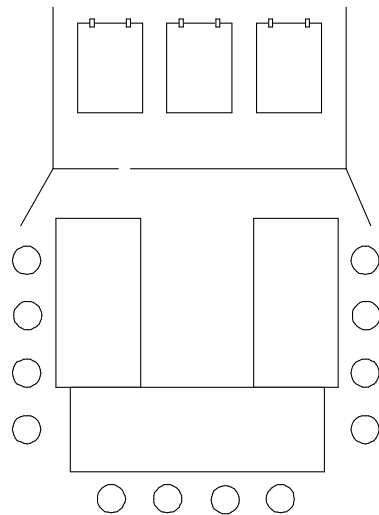
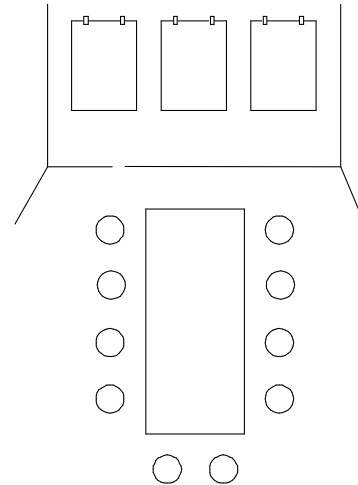
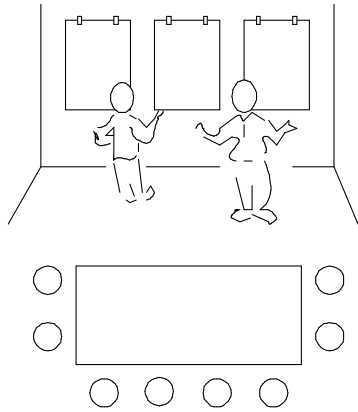
Core Members, Resources Members,  
Team Leaders, Subject Matter Experts

# LCI COMMUNITIES OF PRACTICE

## Meeting logistics – Preferred room layout



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Optimize focus & participation

## A Modest Business Case

- Assume: 15 team leaders @ \$50 (fully loaded) per hour average, spend ½ their time in some sort of meeting activity – formal/informal, etc.
- 20 hours x 15 meeting attendees = \$15,000 per week on meetings
- If the average meeting involves at least 3 participants and includes two who have not attended “5 Keys”, the cost for 20 hours = \$45,000 per week spent on meeting activity direct costs
- The least productive 20% = \$9,000 each week = \$432,000 in a 48-week work year
- Rework, lost time, low motivation, poor follow through, lost opportunity, etc. create additional indirect costs that can at least double the wasted cost

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Review Assessment Form for Meeting Best Practices



## 5 Keys for Collaboration Workshops Available for Your Team

1. Facilitative Leadership Skills
2. Meeting Planning, Management & Logistics
3. Stakeholder Analysis and Engagement Strategies
4. Collaborative Problem Solving
5. Collaborative Decision Making

## Key Take-Aways,

- Meeting management is complex; there are many concepts and tools to master; before, during and after meetings. Build your tool box and skills.
- Focus on meeting processes is key to productivity.
- Facilitative Leadership requires changes in the way we think about leadership and how we behave.
- Meetings can drive a collaborative culture; you must model the behaviors and attitudes you want.