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FEATURED ARTICLE

A Tactical Approach to Retaining Clients in a COVID-19 World: Implementing a Service-Based Management System during a Global Pandemic

By Susan Gorveatte

Introducing Service-Based Management Systems

The world is different; that much we know. As service-based organizations continue to work through the COVID-19 pandemic, their focus is clear–thrive by maintaining and increasing customer service levels to ensure customer retention and growth. But with potentially reduced resources and economic leverage, how can this be done?

A New Tool for Making Meetings More Efficient

By Yves Van Nuland and Grace L. Duffy

Abstract

We have all experienced the difficulty of leading efficient meetings. Classic team meeting rules or key performance indicators (KPIs) are not enough. Effective use of KPIs can greatly improve results, while organizational culture can have a negative impact on classic meeting protocols and outcomes. A new, pragmatic tool, 2"-8" (2 minutes - 8 minutes rule), facilitates a ten-minute decision-making cycle. Respect for team members' thinking styles (culture) also plays a decisive role in meeting efficiency. The combination of both factors, the 2"- 8" rule and organizational culture, can lead to exceptional results

Characteristics of Meetings

In our function as consultants, we often observe the following meeting characteristics:

- Participants explain their actions in detail

- Participants try to prove that it is not their fault that an objective was not achieved

- The group tries to solve a problem during the meeting

- Multiple people speak at the same time

- There are no clear objectives for the meeting

Although this list is not complete, it illustrates well how meetings can be unproductive. In addition, meetings are often lengthy and cumbersome. Participants are not motivated to attend inefficient meetings. What can

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be done differently to overcome such difficulties? What can be done to energize people? What can be done so that the meeting will deliver better results? If classical meeting rules to avoid the above time wasters are consistently applied, you will have better meetings. This paper outlines an approach to conducting meetings that will make them more efficient.

Information or Decision Meeting

There is a difference between an information meeting and a decision meeting. While people need to be informed, there are many ways to provide information (e-mails, reports, intranet, meetings, informal contacts). In an information meeting, the chair of the meeting communicates information, and the participants can react and ask for clarification. The length and frequency of an information meeting depends on participant needs. However, we have observed that in organizations with little or no focus on objectives and results, people need frequent information meetings, which can burn up hours of valuable time because this type of meeting is rarely efficient. Organizations that do not focus sufficiently on objectives and results have difficulty achieving excellent results.

Leaders need decision meetings because they are accountable for achieving results. These results are aligned with the strategic and operational objectives of the organization's business plan. Besides the achievement of these results, there are also operational results that are linked to core organizational processes. In these cases, the leaders work with result KPIs[1]. In other words, a decision meeting is a meeting where leaders work with their KPIs. In organizations that run decision meetings, there is a high focus on results.

New Tool: 2"– 8" Rule

We have shared nothing new so far. But the main questions are: How can we make meetings more productive? What can we do to have shorter, more effective meetings? What conditions need to be present to energize participants and obtain desired results?

We mentioned classic meeting rules earlier. Having an agenda, refraining from fault-finding and extraneous problem-solving are all excellent practices. Driving efficiency through KPIs keeps the meeting focused on desired results. Each task or process must be assigned to an accountable individual who sets leading indicators to monitor progress. The meeting leader gives each KPI owner a short time on the agenda to share progress and challenges.

The KPI owners briefly explain what they expect to achieve during the meeting. They take two minutes, i.e., 120 seconds, maximum, to explain what they did during the last week, the results achieved so far (perhaps showing a graph about results), and how their objective is aligned with higher objectives. Finally, they present an action plan, i.e., what must be completed in the coming weeks. There are two possible proposals: (1) a concrete action plan for the coming week/month or (2) the owner's challenge with how to make progress. If the KPI owners need support, they simply ask team members: "I don't know what to do; can you help me formulate a possible action plan?"

The team members then have eight minutes to discuss and improve the proposal or develop a new high-level action plan. At the conclusion, the team reaches a consensus on the existing or modified action plan. The whole discussion takes fewer than ten minutes.

Consensus is not a compromise, nor is it the idea of one person that must be accepted by the team. Neither is the majority rule applicable. Consensus means that everyone contributes to a constructive debate. Every team member adds his or her ideas and experiences to the discussion. The final proposal is the reflection of the whole team. Every team member can live with the final proposal and has a positive view of the result.

Application of the 2"– 8" tool becomes easier when a standardized KPI[2] is used. The KPI owner makes a clear and detailed description of what needs to be achieved through the KPI. This allows the KPI owner not only to prepare better for the meeting but also to explain what she or he wants to achieve during the meeting.

One pitfall in this approach might be if the KPI owner does not have a solution for the KPI and starts to explain in detail everything that has already been done. Such an explanation will not have a positive outcome because it will almost certainly

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take much more than two minutes. Usually, it will take 10 to 15 minutes, or even more. The team loses focus, and the meeting ends with no conclusion and no agreement about decisions.

Why does the simple 2"– 8" tool work so well? There are three reasons. First, the two-minute introduction allows the KPI owner to communicate with all team members, i.e., to create rapport with the team. The owner explains clearly what he or she wants to discuss. Second, the discussion is limited to a small number of items. Through this focus, it becomes clear to the team members what the owner does *not* want to discuss. And finally, there is better focus within the team, i.e., everyone knows what kind of action plan the team will decide on within the ten minutes. Obviously, the 2"– 8" tool only works if the KPI owner is well-prepared for the meeting.

Organizational Culture

Not everyone is aware of the impact of organizational culture[3] on personal motivation and satisfaction and on the achievement of results.

We wish to share some examples of statements reflecting two different meeting styles (see Table 1). These two approaches exhibit different ways team members behave. The output achieved in these two types of meetings can be very different (see Table 2).

People working in a defensive company culture can use a constructive thinking style by saying what they plan to do in the coming week or month instead of explaining the encountered difficulties.

Think about what kind of decisions you'll see in both situations. Table 2 gives some possible decisions that teams using these two styles might take.

The examples in Tables 1 and 2 are certainly not complete. However, these will give the reader an idea of the contrast between the two thinking styles. In a defensive mindset, people will talk about past events 80% or even 90% of the time. With a constructive mindset, people speak about their plans and the

(near) future 80% of the time. In the first case, meetings can be lengthy (two hours and more), energy-consuming, and ineffective. In the second case, team members need only ten minutes per KPI, which keeps meetings shorter (approximately one hour), energizes participants, and encourages enthusiasm. The more efficient format provides the same reality but a completely different outcome! Think about it the next time you participate in a cumbersome and ineffective meeting. Applying the 2"– 8" rule can help you spontaneously use a more constructive thinking style

Example of Application of the 2"– 8" Rule

One of the authors recently met with a client preparing for an on-site customer visit. The author had previously helped the client prioritize process, measurement, and documentation improvements critical for the customer visit. A list of 21 action items had been identified. The author met again with the client for a review of resolution activities. The department heads (Chief Operating Officer, Chief Technical Officer, Chief Engineer, and Production Manager) each took fewer than two minutes to describe the status and results of their action items. When the speaker identified a barrier to resolution, the whole team—including the company owner—spent no longer than eight minutes discussing and gaining consensus on the required next steps. Responsibilities were recorded, and accountability was accepted. What was planned to be a two-hour working session was completed in less than an hour-and-a-half.

A Hint for Managing Energizing Meetings

How can you change a cumbersome meeting into an energizing meeting within 30 seconds? Ask the people around the table: "What do you want to achieve next month?" Suddenly everyone will think about "What to do in the coming weeks? and What is feasible?" We use this technique with our teams, and it works! In the defensive thinking style, people hold an information meeting, while in the constructive thinking style, people hold a decision meeting and are process and result-oriented.

Table 1: Contrast of statements from two different thinking styles

Looking back: Defensive thinking style	Looking back: Constructive thinking style
Explain what the problem is.	I put the following proposal on the table.
Are you sure that this is all the information we need?	I suggest this action plan with a clear "Who does what, and when."
I don't understand why it happened.	In preparation for the meeting, we found that the cause of the problem is … and the solution for it is … Therefore, my proposal for an action plan is …
Let's try to solve the problem now in this meeting.	I examined the problem yesterday and my proposal for a solution is … Can you agree to implement it?
Can you give me more information?	If we execute this action plan, we'll get the following result by next month …
I am still not clear. Can you say it again?	As you can see in the graph … there is already a positive trend.
This is not my responsibility; my colleague Tom can do that.	Can we all agree on this proposal?
My feelings tell me that this is not a good idea.	That is a good idea you have submitted to us.
Once again, this is a stupid proposal from the other department.	That is a new and worthwhile idea to investigate. The objective is not clear.
The objective is not clear.	As you can see in our KPI under the heading "What do I want to achieve? we plan to do the following …
We can't do that because …	We can solve that problem through …
That is too difficult.	We can overcome the difficulties by taking the following precautions …
We have not examined every detail; therefore, we need more time.	What do you think we can do by next week?
Yes, we can do that, but I have a better idea.	Interesting idea, what do the other team members think about it?
Which problems do we have?	What kind of solutions do you have? What kind of results can we expect to obtain?
Everyone tries to convince the others.	Listen with empathy to the ideas of the other team members.
Problems are described and discussed.	Possibilities and opportunities are discussed.
Team members explain in detail what they have done.	Every team member achieves at least one consensus decision (action plan) for his KPI by the end of the meeting.

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Table 2: Two types of decisions

Looking back Defensive thinking style	Looking forward Constructive thinking style
OK, perhaps we can do that.	OK, we agree on this decision and plan. (Who will do what and when.)
We need another meeting so we can have a more detailed discussion.	We conclude that the consensus decision will be executed, i.e., …
We'll do that because our boss wants us to.	How much will this decision contribute to the planned objective?
Let us look for a compromise.	Let us make a consensus decision.
Decisions are vague.	Decisions are specific and smart.
We have so many reasons to postpone our decision.	We are clear about what we want to achieve. We can decide in this meeting.
We try to do everything at once.	We decide things one by one. Make progress by executing a step-by-step plan.
Subjects of participants are discussed without focus.	Decisions are aligned with the priorities and strategic objectives.

Conclusion

Fortunately, many team members say that they like the constructive style, that it gives them energy, and are highly satisfied with the results. However, the authors often see examples of the opposite practice. You'll be successful if you prepare your meeting well, update your KPIs, encourage constructive thinking during the meeting, limit the introduction of your KPI to only two minutes, work with a team spirit and, finally, reach a consensus of the team on a concrete action plan (who does what and when). This working method results in shorter meetings. A team of five people can hold a meeting in less than one hour and achieve at least five smart decisions.

References

1. Results KPI: this is a traditional KPI. The owner of this KPI monitors a process leading to a quantitative result (Achievement of an objective).
    Activity KPI: This is not a real KPI; this is a "qualitative KPI." It is a follow-up of a series of activities. This is typical for projects. Once the goal of the activity is achieved, the KPI owner assesses success with a results KPI.

2. Yves Van Nuland and Grace L. Duffy, (PM)2-method, *Quality Magazine*, (2022)

3. Human Synergistics International https://www.humansynergistics.com/