

# **Liberating Management Teams or A Macrostructure for Management Meetings to Foster Teamwork and Inclusiveness**

How well a management group performs as a team inevitably creates repercussions through all levels below it. Plus management meetings at each level become the learning space and the role model for management meetings at the next level. Hence, fostering teamwork for all management teams starting at the CEO level should be a critical activity. Though this is well recognized, in reality on a day-to-day basis, it is frequently a totally neglected activity. This in good part explains frequent team dysfunctions since teamwork is first and foremost a practice that can and must be learned regardless of the personalities and talents involved. Some basic principles are the same for all contexts from sport teams to management teams. There is no magic involved; learning requires commitment and regular practice – the more frequent the better and the smaller the bites the easier to make progress -- plus unvarnished feedback at every opportunity.

Management teams that meet on a bi-weekly or monthly basis are unlikely to reach the frequency of practice needed to become a well performing team particularly since chronically agendas overcharged with business issues are the norm.

For a group to become a team all of its members -- including the boss -- must work together to produce or generate some tangible results. Members must help each other succeed. Listening to other people's presentations and approving proposals after some deliberation is unlikely to fit the bill.

Clearly there are reasons why team development is not a constant agenda item for all management meetings. The most obvious is that it is a complex and emotionally charged activity. It can also be charged with fear. And it doesn't get easier at more senior levels in the organization. If anything it tends to be even more difficult and neglected. Therefore it is essential to create structures that will make team learning as

easy as possible. Personalities are hard to change but structures are easy to put in place; they only require the decision to do so and the commitment to stick with them.

All managers complain that they have too many meetings to attend. The real issue is not the number of meetings but their quality. If people came out of their meetings smiling, energized, uplifted, hugging each other, etc. all complaints would disappear. Therefore a management meeting structure must also have the purpose to foster quality. Good teamwork and quality go hand in hand.

Having to attend meetings where either one has nothing to contribute or learn, or where one isn't given the opportunity to contribute is another frequent complaint. Therefore a management meeting structure must also optimize both attendance and participation. When people are present they must be included. When they are not needed they must be free to not attend.

A management meeting structure that meets the above criteria will inevitably save time by greatly reducing waste. Meeting more frequently and preventing small issues to turn into larger problems will save lots of time. Making quick decisions in the moment will prevent lots of unnecessary work or projects. Good teamwork at many levels will reduce friction-generated waste.

I recommend creating a management meeting structure consisting of "Daily, Weekly, Monthly, Quarterly and Special Meetings" in order to make all management meetings predictable both in terms of timing and the nature of their agendas. These four types of meetings are interconnected in that agenda items will flow from one meeting into another as needed. The overall structure is designed to ensure that there is always an appropriate place with enough time to address and truly resolve all issues. The management meeting structure for an entire company or organization is fractal in that it is repeated at each level. Attendance consists of the whole departmental team if there is only one level of management.

The agendas of all meetings are co-created by the whole team and emerge out of their conversations; purpose, attendance and design are clarified together to avoid waste and surprises. Some of the basic Liberating Structures such as 1-2-4-All, 9Why's and Storyboarding will help to ensure quality, participation by all team members and

efficient use of time. A simple method like a Kan Ban may also be helpful for tracking progress.

The management meeting structure proposed below must be implemented as a whole to provide strength, flexibility and quickness.

1) “Daily Open\*”: scheduled for about **15 minutes** (can be shorter if no topic is offered after the 1st round) - Same time, same place every day so that all can plan around it - Whoever (from the team) is in the office comes - No preset agenda – Start first with one round where each speaks in turn to share key activities of the day in 30 seconds each (what’s on my plate today), then a pause, then free dialogue - The time frame is “TODAY”; topics for the dialogue are issues or challenges for which someone needs help, support, coordination, advice or sympathy; also new/in the moment essential information is shared, such as delays, surprises, personal problems and important updates. Urgent decisions that can be made quickly are handled on the spot. If an issue requiring more time surfaces, the whole team identifies the purpose and the level of urgency, then decides whether to deal with the matter the same day, or schedule a separate “one-topic meeting”, or put it on the agenda of a forthcoming **monthly** meeting or **quarterly** meeting. I recommend holding the “Daily open” sitting or standing in a circle with no table and preferably in a room that is pleasant to be in. **It is essential that this “Daily Open” not be allowed to turn into the “boss’s meeting”**, meaning a meeting to check up on others, a meeting that he/she runs, decides the agenda and makes decisions. The boss has to learn to shut up! The “Daily Open” must be owned by everybody and take place even when the boss cannot be present either in person or on the phone.

2) “Weekly Open”: essentially a longer “Daily Open” with **30 to 60 minutes** scheduled (again less time is used if all’s well) - Same day, same time, same place every week but the timing of meetings is reviewed every week for the next couple of months in order to adjust dates for unmovable conflicts – There is no upfront agenda except for exceptional occasions when the group decided to include a topic that emerged during a previous Daily Open- The time frame is “THIS WEEK” - First, one round with one minute reports from each in turn to outline main issues/ challenges for the coming week - Second, quick (one minute each max.) progress review of last week: what important activities or

results were we tracking and what progress was made/not made last week - Third, what targets do we have for this week? - Fourth, based on the first 3 rounds all present construct an agenda together with topics proposed by all in answer to five questions: what do we need to discuss now to get done what we want next week, what's in the way, what agreements are needed, what needs to be scheduled, what plans need to be changed? In addition, once a month at the weekly meeting following the closing of the books, expenses and budgets are reviewed together, with each person commenting on the sales/expenses they are responsible for; budget adjustments are made together as needed. As with the daily meeting, if an issue requiring more time (i.e. more strategic) surfaces, the whole group agrees on the purpose and the level of urgency then decides whether to deal with the matter the same day, or schedule a separate "one-topic meeting" (a one-item meeting with preparations identified in advance, and maybe attendance and design outlined), or put it on the agenda of a forthcoming monthly meeting or quarterly meeting.

3) "Monthly" meetings: **Half a day** (longer on an exception basis only; shorter if only one topic is on the agenda) - All dates are set 12 months in advance and the yearly schedule is reviewed every month in order to adjust dates for conflicts – Participants reserve a full day on their agenda for flexibility - Topics are strictly limited to major issues that have surfaced during the daily or weekly meetings and that were not so urgent to justify a "**one-topic meeting**" - Such topics are those that require each a couple of hours of working together to decide what and how to proceed - The agendas for the monthly meetings are constructed well in advance and **jointly** during the daily and weekly meetings; at the same time, with all present, agreements are reached about what preparations, if any, need to be made by whom so that the issues scheduled for discussion can be properly addressed. It is essential that those meetings be prepared and long enough to be effective. Long enough means that the duration of the meeting is variable and determined by the time needed for each topic. Time needed is determined by a clear and detailed design for addressing each topic. In other words overcrowded agendas are a no-no. Effective means that issues addressed are truly brought to resolution with the whole team support and lead to action. Effective also means that all those who are affected by the issue are included in the meeting. Otherwise the unresolved issues will spill into and infect other discussions or meetings. In addition

the participants will justifiably be frustrated, find those meetings a waste of time and start resisting/avoiding them.

**4) “One-Topic” Special Meetings:** Those meetings are slotted between monthly meetings when a topic is too urgent to wait for the next monthly, or the next monthly is too full already. Those meetings are purposely limited to one topic in order to avoid distractions and crowding. The decisions about design, participation, time allocated and preparations are taken jointly as for the Monthly.

5) “Quarterly” meetings: **One full day** (longer on an exception basis only or once a year) - Dates are set 12 months in advance – I strongly recommend to hold those meetings offsite and to include a dinner the evening before in order to provide some social time for the team – Alternatively do ½ day on the first day and overnight followed by a ½ day. Those meetings are for those strategic issues that need to be addressed periodically or annually; examples of these would be: quarterly targets, annual budget preparation, organizational development planning, overall performance review, individual performance reviews, succession planning, strategic directions, etc. There is great benefit in spreading such issues along the year rather than crowding them at their "must-do-now time". The same productivity caveats as for the monthly meetings apply here just as much or more in terms of not overcrowding agendas and providing adequate design and time for each topic.

**6) Comments:** The whole collection of meetings needs to be implemented as a whole since these meetings are interdependent and feed into each other across times and levels. It is because teams do not meet daily or weekly that "small stuff" accumulates, grows and creeps into all other more strategic issues. Likewise it is because there are no clear times reserved for discussing the "big or sensitive issues" that they creep into day-to-day events in a way that can only be frustrating: they were not on the agenda and there can therefore never be enough time to do justice to them when they come up by happenstance and without preparation. Those are the characteristics of chronic issues that go on and on, sometimes for years.

The proposed structure of meetings is intended to provide the space for what a team needs to do together in order to function effectively. It is not a space for listening to

presentations on the work of others; it is separate from meetings that need to be held in the ordinary course of conducting business. **It is the space to work together and produce some output together** (a group cannot call itself a team unless, working as a team, it generates tangible outputs). This structure provides the space and the frequency without which strong generative relationships cannot develop across the whole group.

While this may look like a lot of meetings, it will, in fact, save a lot of time for all, as well as increase team effectiveness. The key is to stick to the discipline of holding ALL the meetings, of keeping them no longer than necessary and of not compromising on quality. QUALITY IS KEY! This will allow the accumulation of frequent interactions to work its magic. The other essential thing will be for all to learn to make each other accountable and not shy away from bringing up the sensitive issues; this can only happen gradually and will require explicit mutual agreements.

The “Daily Open” and “Weekly Open” meetings are perfect for making it easy to bring up issues before they bloom into full-scale time-consuming problems. They are perfect for building trust and comfort. The process of building agendas for “One-topic” or “Monthly” meetings makes it clear for all which important issues will be addressed and when; this helps reduce the usual anxiety that develops otherwise. Since the whole team is co-creating agendas, it also shares the ownership of meetings. In other words the group attends its own meetings instead of meetings that were decided and designed by others.

The “Quarterly” meetings will require some thinking upfront to develop a list of what will be addressed; this list is a must review / adjust during each quarterly meeting. These longer meetings are opportunities for the team to have a larger and more flexible chunk of time together. For some topics it will make sense to include other people; in these cases they must be truly included and fully participate in the work (no spectators). It is a good practice to go off-site for “Quarterlies” and to include some casual time. If you look at my Do's and Don'ts they are referred to as "Go out in the woods". Keep that in mind. Depending on your situation one day may not be enough for all “Quarterlies”.

It is tempting to think that a team of some 8-10 people does not have a level of complexity that deserves such an elaborate and disciplined series of meetings. I personally don't believe that size or organizational level changes much about what's needed for a group to have healthy interactions and to be as good as it can be. Both effectiveness and efficiency are critical; this requires transparency and exquisite teamwork. In particular it is essential that all on the team have a clear sense of their shared purpose, know at all times what others are doing, what they are expecting and what's on their mind. This is much more easily achieved in small doses on a daily and weekly basis. Practice is key! Transparency of activities across functions and a consistent series of meetings create a venue for all to be involved and contribute and thus an ideal platform for personal development.

The fear is always that too much time will be spent in meetings. I don't think that is the real issue; the true one is the productivity of the meetings relative to the time devoted to them. Without it, it will be difficult to stick to the commitment of holding all the meetings and not start canceling them at the last minute in order to avoid the urgent from getting in the way of the important. There will also be the temptation at some point to think "we are ok now, we don't need this anymore and can reduce or eliminate some meetings". And, of course, it will take the willingness to enter occasionally into some difficult conversations; not shying away from those will be signs of major progress.

I believe in doing as little planning as necessary but in doing lots of preparation in order to be ready to make changes and adjust quickly. Key to the preparations is an investment in building relationships. It is the process of continuing conversations from day to day and week-to-week that makes possible a lot of in-the-moment decisions, adjustments or improvisations. It is the interlocking meeting structures between levels that make it possible for information to travel fast between levels and for reactions and implementation to be swift. It is the productive monthly and quarterly meetings that provide the clarity of direction, resources, shared commitments and processes needed to free up the energies of all involved.

Becoming a more effective team and making meetings more productive can't happen without learning from experiences. Committing to the routine practice of debriefs at the

end of meetings is essential but not enough. To be useful debriefs must be of quality and include everyone. I recommend using the Liberating Structure “What? So what? Now what?” It is as simple as it is effective. It makes it easy to surface dysfunctional patterns.

Productive meetings don’t happen by accident. They require proper preparations starting with developing a clear, tangible purpose common to all participants. Sounds obvious but how often is that not the case? (I recommend 9Why’s as a simple structure to help a group focus on purpose) Next comes making sure that all the right people are included and therefore coming up with a design that will make this possible. I recommend creating a Storyboard for every meeting. There again the practice of doing this routinely will not only make a team become fast and fluent but will invite a much greater level of participation and teamwork.

**In times of crisis the duration of some or all of the meetings may need to be increased as well as the breadth of inclusiveness.**

During good periods, more time should be devoted to reflecting, anticipating potential surprises and strengthening the organization.

When to start is always a question. My answer is simple: **NOW** is the ideal time because there is always the need for a process that will strengthen and support the team both when the boss is present and when he is not. NOW is the only time because there is nothing to prepare, just the right number of chairs in a circle. And if the reason you don’t start NOW is because you have a better structure please share it with me as I am sharing this one.

Finally be sure to make this fun, kind and rewarding for all particularly at times when painful moments cannot be avoided!

*Henri Lipmanowicz*

P.S. Those who have people reporting to them that are in different countries will have to take into account the logistical realities of geographical separation and the greater fragmentation of responsibilities. I suggest experimenting and seeing what works since



people in different countries may have little or nothing to do with each other even though they report to the same person.

\* The word “Open” and the agenda-less meeting gets its inspiration from “Open Space Technology”, a meeting process invented by Harrison Owen where, among other aspects, the agenda is created by the participants at the start of the meeting. I recommend becoming familiar with the OST process.