

# Using Situation Appraisal to Run a Meeting

## Introduction

Meetings, meeting, meetings. For years, managers and employees have ranked “time spent in meetings” as one of their top workplace complaints. They claim that many meetings are unnecessary, and those that are needed are often unfocused and ineffective.

When asked to explain why meetings fail, some of the most common shortcomings are:

- There is no clearly stated purpose for the meeting.
- The participants are ill-prepared.
- The right people are not present, or people are present who had no real involvement.
- The meeting does not focus on one issue at a time.
- The results could have been achieved as well or better without a meeting.
- The meeting runs too long.
- The meeting dissolves rather than ends.
- The participants are unclear on the next steps following the meeting.

These shortcomings seem to be true no matter what the meeting venue, be it a conference call, teleconference, or virtual meeting. Using Situation Appraisal before, during, and after the meeting will increase your chances for a successful meeting.

## Before the Meeting

Start by conducting a Situation Appraisal prior to your meeting. Identify concerns by asking three key questions:

1. What concerns do you have about conducting the meeting?

Answers to this question will help you plan and prepare for the meeting by developing an agenda, identifying who should attend the meeting (for more information on managing the involvement of others, see *Involving People in Your Decision-Making Efforts*), selecting the chairperson and facilitator, announcing the meeting, and resolving other issues that could threaten the success of the meeting.

2. What concerns need to be addressed during the meeting?

Answers to this question will reveal the issues you want to resolve or appraise during the meeting. If necessary, set priority on these issues to determine which ones will be evaluated during the meeting. Enter the concerns in Action Tracker so that you can track their resolution.

3. Given your concerns, what do you hope to accomplish in the meeting?

Answers to this question become your primary meeting objective-the specific, main goal you want to accomplish in a meeting-and your secondary meeting objectives. They will focus the meeting and help you determine how best to conduct the meeting.

In many cases, you'll discover that conducting a single rational process during the meeting will satisfy the primary and secondary objectives: Decision Analysis to make a decision in a team; Potential Problem Analysis (or Potential Opportunity Analysis) as a part of a project or planning meeting; or Situation Appraisal to sort out a large concern or to review status. For example, your concerns might be around choosing a new waste disposal vendor. At the meeting, you hope to make the decision about which waste disposal vendor you'll hire. Therefore, you decide that you'll conduct the meeting by using Decision Analysis.

Clarifying the purpose of the meeting by using Situation Appraisal will focus the meeting for the participants. However, it's important to keep in mind that a face-to-face meeting may not be necessary. A conference call, a virtual meeting, or no meeting at all might be best.

Here are some questions that will help you decide if a face-to-face meeting is necessary:

- Is a meeting the best way of reaching the primary meeting objective?

- How else could the primary meeting objective be achieved?
- What would be the consequences of not holding a meeting?
- Is the meeting worth the cost? What is the value of accomplishing the primary meeting objective?
- What could people be doing instead of meeting?

The cost of a face-to-face meeting includes people's time, travel expenses, the cost of what else could have been accomplished in that time, and the cost of planning, conducting, and following up the meeting.

## **During the Meeting**

You can start every meeting with a Situation Appraisal to ensure that all concerns are included, that the meeting addresses the most important concerns, and that the team agrees on the analysis needed. Concerns not addressed during the meeting can be carried forward to the next one, or assigned for individual resolution. A quick Situation Appraisal is particularly useful at the beginning of a staff, departmental, or project meeting designed to cover a number of topics.

Use Situation Appraisal as the entire focus of a meeting in situations where:

- The manager or organization is new.
- An assessment of the "big picture" is needed.
- You need to break apart a "mess" that is not being addressed.
- Priorities need to be examined or reestablished.
- Concerns need to be broken down into actions and responsibility assigned.

Many managers have monthly or quarterly Situation Appraisal meetings that help put concerns in proper perspective and set the direction of the unit for the months ahead.

When you conduct your meeting using Situation Appraisal, remember that you're appraising what is known at a given time. As time passes and new information comes to light, you may have to reappraise the situation.

Parts and pieces of Situation Appraisal are also very useful during a meeting. For example:

- Separate and clarify concerns raised during any meeting by using the questions "What do you mean by...?" and "What else concerns you about...?"
- Set priorities on concerns or actions using Current Impact, Future Impact, and Time Frame.
- Assign a rational process or a piece of a rational process to resolve concerns that are surfaced during a meeting.
- Assign responsibility for actions to make sure that they are completed.

## **After the Meeting**

To monitor the progress, ask questions such as:

- Is the action plan being accomplished?
- Are the results on target?
- Has the primary meeting objective been met? If not, what can we do?

In addition, it may be useful to conduct a post-meeting Situation Appraisal with members of the meeting or project team to identify what still concerns the team about a given situation. This will allow team members to contribute issues that come to mind after a meeting, or that were not given time during the meeting.

## **Summary**

If there were one thing you would like to improve at work, what would it be? Many people would respond by calling for fewer meetings. Meetings occupy valuable time and resources, and often don't achieve their objectives. However, using Situation Appraisal can help clarify the purpose of the meeting before it's held, determine whether a face-to-face meeting is necessary, identify issues to address during the meeting, and ensure that the primary meeting objective is met.