

Application of Conversational Intelligence® in Meetings

The Leader's Role in a Meeting:

1. **Have a clear desired outcome**—Have a statement that clearly describes what's true at the end of the meeting. For recurring meetings, consider “naming” these so the outcome is understood (i.e. Team Building, Stand-up Business Updates, Huddle, etc.)
 - a. Why are you meeting?
 - b. What are the outcomes you want to have as a result?
 - c. Do you know what those outcomes are?
 - i. If you don't know before, how will you know during?
2. **Stay current on the value of meetings being held**—Complete an assessment of all of your meetings using the parameters outlined in #1.
 - a. What standing meetings are vital, productive and useful?
 - b. What meetings are intentional?
 - c. What meetings are clear with outcomes that meet our objectives?
 - d. What meetings build the team/relationships and also achieve business results?
 - e. Are meetings necessary to build the team dynamics? If so, how long and how often?
3. **Be a facilitator**—Make the reaching of the desired outcomes easier
 - a. Have the decisions been reached?
 - b. Has the process been followed?
 - c. Is the discussion complete, for now?
 - d. Are people engaged?
 - e. Are you clear on who is responsible for what tasks?
4. **Talk less, Ask more questions**—Instead of telling and advising, ask Level 3 Conversationally Intelligent™ questions and notice:
 - a. Who is talking most?
 - b. Is the conversation equally shared?
 - c. Are people waiting for you to respond or are they engaging with one another?
 - d. Do you provide a way for others to contribute?
 - e. Do you invite critical thinking and ownership by others in the meeting?
 - f. Is the conversation dynamic and interactive, alive and engaging or one-way, short, intellectual answers?
 - g. Are others taking responsibility for the outcomes in the meeting?

The leader's most important meeting role is to create an environment of safety and to build high trust so team members are empowered to bring his/her voice to the conversation. The leader defines the desired outcome so everyone knows what success looks like. Outcomes are achieved, team members are empowered and the leader becomes a culture change agent by improving the quality of the conversations and the relationships.

Suggestions to improve Conversational Intelligence™ in Team Meetings:

Before the Meeting:

- Establish context, intention and purpose of the meeting
 - Why?
 - Outcomes?
 - How?
- Develop your own list of Open Ended, Share and Discover questions. These are questions for which you don't have the answer.
- Develop an Outline of Agenda and send to all to review in advance—include questions you want them to think about in advance

During the Meeting:

- Open by establishing context, intention and purpose of the meeting
 - Why?
 - Outcomes?
 - How?
- Aspirations—What does each person hope to gain from the meeting?
- Visit the Arc of Engagement and Rules of Engagement/Group Norms—where is everyone and what's needed to partner
- Develop Rules of Engagement with the team—what will create a safe and trusting environment?
- Pay attention to the vibe and energy in the room—are we acting as a best team and honoring the g?
 - If so, acknowledge, appreciate and celebrate
 - If not, revisit Arc of Engagement—what's needed to reestablish trust?
- Interaction and Engagement with the whole group—facilitate the discussion and let others contribute
 - Track parking lot items for future meetings/projects out of scope
- Wrap the meeting
 - Did we meet our Aspirations, Outcomes and Intention?
 - Take-aways?
 - Commitments? What and by Whom?
 - Next Steps?
- Close—What is necessary to be said now to be complete and to end well? What do you want to acknowledge?
 - LEARN Exercise from Conversational Intelligence®
 - L = Like: What did you like most about this meeting?
 - E = Excite: What excited you most?
 - A = Anxiety: What created the greatest anxiety?
 - R = Reward: What can we celebrate about the way we handled this meeting? (or you can use other “Rs” based on the type of meeting—what do you now want to reframe, revision, redirect, restore, etc.)
 - N = Need: What are the next steps we need to take to stay on track?

After the Meeting:

- Recap and provide to all who were in attendance

SAMPLE IDEAS FOR TRACKING IDEAS, TOPICS and PROJECTS

Parking Lot – *topics that are important for future meetings to be expanded on following the meeting –*

TOPIC	DESCRIPTION	OWNER OF NEXT STEPS	CURRENT ACTION ITEMS	BY WHEN?

The Idea Factory - *ideas for improving Team Dynamics or Business Results. Feel free to contribute. (Posted on a Drop Box, Evernote or Google Drive)*

PROPOSED ENHANCEMENT ...	DESCRIPTION	OWNER OF NEXT STEPS	CURRENT ACTION ITEMS	BY WHEN?

The Idea Board – *visual board with ideas for improving Team Dynamics or Business Results.*

IDEAS	ASSIGNED	COMPLETED

SAMPLE MEETING RECAP

Company Name

Project Team or Department Name

Meeting Name

Date of Meeting

In Attendance:

Aspirations/Goals:

Issues to Address:

Insights:

Celebrations:

Obstacles:

Comments Made/Discussion Highlights:

Tools/Resources Provided:

Take-Aways:

Commitments/Action Steps:

Next Meeting: