The Seven Step Meeting Process

The Seven Step Meeting process is a methodology for improving the efficiency and effectiveness of meeting.[1] A few key design principles of this methodology make it successful. First, the rules of engagement and participation are clear to all parties from the beginning. Second, the ownership for success of the meeting is shared across the whole group and not dependent on any one person. Finally, the process uses tools and techniques to keep the group on track and productive.

The meeting process starts with the following timed agenda:

1. Clarify the aim of this meeting
2. Assign Roles
3. Review and Establish Times for Each Agenda Item
4. Work
5. Review: Bring the dialogue to a close and review the work of today
6. Plan the next agenda
7. Evaluate the meeting

A mock timed agenda is provided in the appendix. To follow is more detail on each of the segments of the agenda and some hints to help guide the process.

Step 1 Clarifying the Aim: At the beginning it is very helpful to remind the group what the purpose of the meeting is for that day and what are the key objectives that are hoped to be accomplished. As an example, "Ok folks, we met last week to work on a process map for medication turnaround time. Today we are continuing that process and we hope to complete the flow through at least return of completed order to the patient." If at any point during the meeting the conversation drifts and you feel lost in the process go back to your aim and use that to help clarify what you should be focusing on. For example, in the aim statement just presented once the group starts work the conversation could get hijacked by someone who has an issue of people mismanaging medications when they get home. Normally that conversation could degrade and take a good bulk of the meeting. Rather, anyone in the group should have permission to be able to simply say "I have a quick process question. Who are we in the agenda

[1] . Original attribution to the Seven Step Meeting Process is believed to be Executive Learning, a consulting firm based in Nashville Tennessee that has been very active in the 1980's to present in the field of quality improvement.

and how does this topic relate to what we said we are going to work on today." That is a polite way to keep the focus on the meeting process and not blaming any individual for derailing the group.

Step 2Assigning Roles: The person who called the meeting often begins this process. Once the aim is clear to the group for the meeting, the next step is to assign roles. There are four roles which can be assigned: Leader, Recorder, Timekeeper and Facilitator.

> **Meeting Leader role:** The person who called the meeting can serve as the leader or that individual can ask for someone to volunteer leading the meeting. It is important to recognize that this role is not intended to be a power position but a mechanical one. The leader's role is simply to ensure that the agenda is followed and the group manages its time. The leader starts and stops the meeting and helps lead the wrap-up in steps 5-7. In between the leader helps smooth the transition between agenda items. If you are a leader it is very liberating being able to contribute to the meeting while not having to worry about the mechanics. It is also empowering for staff to play this role. The leadership role can be rotated since it is purely mechanical. It is interesting to see that very mature groups using this methodology can function in what the great professor of group dynamics Wilford Beon labeled as *leaderless decision making group*[2]*.* A leaderless decision making group is one that is not dependent upon a single individual but rather all members of the group taking ownership and work together to ensure the outcomes are achieved. It is striking to walk in and observe a high performing work group and find that it might be difficult to actually identify the leader as the group works so effectively together.
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> **Timekeeper:** This is also a mechanical role. Once the agenda times are set and someone volunteers to be the timekeeper that individual serves as an active contributor to the meeting process. In addition, they keep an eye on the time and follow a *rule of 50%*. That is when half the time in an agenda item has passed, the timekeeper simply states the remaining time left. AS an example, if there is a meeting with a 20 minute an agenda item when ten minutes has passed the timekeeper would simply just blurt out "*ten minutes left."* That individual would continue with "*five minutes left; two and half minutes left; a minute left, and then Time!".* Once time is called, the leader stops the meeting and then asks the group whether this item is considered closed, whether more time is needed, or whether this item should be tabled and discussed at a future meeting. If the item is closed, good form would be for the leader to quickly summarize

[2] Wilford Beon was an organizational development guru who identified many of the behaviors often exhibited in group situations. He coined the concept of the *leaderless decision making group.*

any action items or conclusions reached. If more time is required, the group can borrow time from another agenda item. It is important to stress that the management of time of the group is not the timekeeper's responsibility, it is the entire group's responsibility. The timekeeper is the safe valve for the group. If during the meeting the timekeeper forgets to blurp out the time reminder anyone can simply say "how are we doing managing our time." The timekeeper role can rotate or if someone has the knack at the role they can be the designated timekeeper over time.

The Recorder: A very important role is to ensure sure the key ideas and points of the meeting are captured real time on flip charts and hung on the wall as the meeting progresses. There are several reasons this is important. First, it is amazing to watch a meeting and see someone make a point. Five minutes later someone else makes the same comment and the group treats it like a profound moment. Whys is this the case. First, while people are speaking others are often already preparing their rebuttal and not listening to the speaker. They often don't hear the comment. Secondly, it appears that at least 10% of the population has a hard time *visualizing*. By that we mean translating oral comments into a mental visualization of the concept. When you capture the key comments on a flip chart paper and post it on the wall real time you will find that people will scan the papers while talking and read to see if a comment has been made. Recording on flip charts allows people to process the comments more efficiently. If someone is late for the meeting they can walk in and in 30 seconds catch up without slowing down the group. Lastly, you can roll up the flip charts and now have a record of the meeting. In fact, you can start your next meeting with a quick review of what was done at the last meeting and then move forward. It is important that the recorder capture what was said not what they want to be said!

Facilitator: In some organizations or environments there is ready access to a trained facilitator. The role of the facilitator is to serve as a "process consultant" to the group using their training and awareness of tools and techniques to help keep the group moving. An ideal facilitator should have little vested interest or subject matter knowledge in what is being discussed but is totally focused on the group process and ensuring it is optimized. As an example, during a meeting someone might ask *"what do you think are the root causes of this problem?"* Someone quickly responds with their perception and begins to clarify and amplify why they feel this is the core issue. Very quickly time gets eaten up and there is no guarantee that the group was focusing on the right issues. A trained facilitator might jump in right away and say "why don't you use a brainstorming technique to get as many ideas out as fast as possible and then focus on those ideas you think are most important." The facilitator role is not needed for every group situation. It is also generally not a role rotated around the group each meeting. It is very difficult to be a member of the group and truly serve as an external facilitator at the same time.

Step 3 Establishing Times for Agenda Items: The leader simply reviews the agenda items and asks for other items. One the list is compiled of agenda items time slots are proposed. The goal here is to quickly assign time slots and not get bogged down in this part of the process. The time slots can all be renegotiated during the course of the meeting.

Step 4 Work: The bulk of the meeting should be devoted to work on the timed agenda items. Steps 1-3 should take less than five minutes as should steps 5-7. As a result, a one hour meeting should have 50-55 minutes of action packed productive work time.

Step 5 Review: When the time allotted for the bulk of the meeting has reached its natural point the leader stops the meeting and does a quick review of what was accomplished that day and key action items and follow-up assignments.

Step 6 Plan the Next Agenda: The leader asks the group for what the agenda items should be for the next meeting. As a result, the group should walk out of the meeting knowing exactly what the agenda items are for the next meeting.

Step 7 Evaluate the Meeting: This last step is one of the most critical steps for keeping the group on track. The leader should ask everyone to write down on a piece of paper a score for the meeting ranging from 0 (the meeting from Hell and hoped to never experience such a meeting again) to 10 (a breakthrough meeting where expectations were surpassed and much accomplished). It is important to write these down and then have people show their scores or you will often see the first person will set the tone and others might change their score to conform to the group norm. The purpose of scoring is to see the variation. If six people score the meeting a 9 and three people all below 3 that is an indicator of some issues that might be stifling several people. All low scores might indicate a degree of building frustration in the group. Once you have scored then the leader should go around the group and solicit one comment on "what the group did well today". The meeting should then conclude with one observation from each member of the group answering the following question: *"what can we do to improve our meeting process for our next time we get together?"* This last question is critical to help identify ways to continuously improve the meeting process.

The evaluation step is always the first to go by the wayside as it is awkward to implement. It often takes two or three meetings before people are comfortable with this part of the method. However, if done well it can be a very powerful vehicle for improving the meeting process over time.