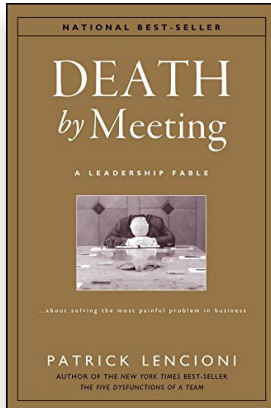


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## ABOUT THE AUTHOR

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# Death by Meeting

## THE SUMMARY

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### Introduction

"If I didn't have to go to meetings, I'd like my job a lot more." It's a remark I've heard from many of the leaders I've worked with over the years. I used to think that it was understandable—even humorous—but I've come to the conclusion that it's actually a sad comment on the state of our business culture. For those of us who lead and manage organizations, meetings are pretty much what we do. After all, we're not getting paid for doing anything exceedingly tangible or physical, like delivering babies or kicking field goals or doing stand-up comedy. Even so, most of us hate them. We complain about, try to avoid, and long for the end of meetings, even when we're running the darn things! How pathetic that we have come to accept that the activity most central to the running of our organizations is inherently painful and unproductive. My question is this: If we hate meetings, can we be making good decisions and successfully leading our organizations? I don't think so.

### The Paradox of Meetings

Meetings are a puzzling paradox. They are undeniably critical as meetings are the activity at the center of every organization. The good news is that there is nothing inherent about meetings that make them bad, and so it is entirely possible to transform them into compelling, productive, and fun activities. The bad news is that in order to do this, we will have to fundamentally rethink much of the way we perceive and manage meetings.

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## Executive Summary

What is the real problem?

First, meetings are boring. Most are tedious, disengaging and dry. When we consider that most of the people struggling through meetings do indeed have other things to do, the pain is only amplified. Second, and even more importantly, meetings are ineffective. The most justifiable reason to loath meetings is that they don't contribute to the success of our organizations.

So the big question is *why*? Why are meetings boring and ineffective?

*Meetings are boring because they lack drama or conflict.* Unfortunately, rather than mining for that golden conflict, most leaders of meetings seem to be focused on avoiding tension and ending their meetings on time. To make meetings less boring, leaders must look for legitimate reasons to provoke and uncover relevant, constructive ideological conflict. By doing so, they'll keep people engaged, which leads to more passionate discussions, and ultimately to better decisions.

*Meetings are ineffective because they lack contextual structure.* Too many organizations have only one kind of regular meeting, often called a staff meeting. People get together for randomly focused discussion about everything from strategy to tactics, from administration to culture but because there is no clarity, there is no context. Participants have a hard time figuring out whether they're supposed to be debating, voting, brainstorming, weighing in, or just listening.

To make our meetings more effective, we need to have multiple types of meetings, and clearly distinguish between the various purposes, formats, and timing of those meetings.

## Problem #1: Lack of Drama

By definition, meetings are dynamic interactions involving groups of people discussing topics that are relevant to their livelihoods. They are often dull because we eliminate the one element that is required to make any human activity interesting: conflict.

Conflict is at the center of every great movie. It is the essence of drama, and it is the reason audiences become and remain engaged in a story. Whatever type of conflict it is—man versus man (Luke Skywalker and Darth Vader in *Star Wars*), man versus nature (Chief Brody and the shark in *Jaws*), man versus himself (John Nash struggling with his mental illness in *A Beautiful Mind*)—without it we lose interest.

Meetings should be more interesting than movies because they have more inherent potential for passion and engagement than movies do. First, meetings are interactive, movies are not. You

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can interrupt someone during a meeting, but you can't interrupt an actor on the screen. Second, meetings are directly relevant to our lives, movies are not. Decisions made during a meeting have an impact on how we will spend our time and energy in the immediate future. At the end of a movie, nothing tangible has changed in our lives.

Screenwriters and directors know they must nurture conflict and use drama to hook their viewers, so they are willing to stay engaged for another two hours. The key to interjecting drama into a meeting lies in setting up the plot from the outset. Participants need to be jolted a little during the first ten minutes of a meeting, so that they understand and appreciate what is at stake.

This might call for the leader to illustrate the dangers of making a bad decision, or highlight a competitive threat that is looming. It can also be accomplished by appealing to a participant's commitment to the larger mission of the organization, and its impact on clients, employees, or society at large. Employees are looking for a reason to care. Ironically, most leaders of meetings go out of their way to minimize drama and avoid the healthy conflict that results from it, which only drains the interest of employees.

So, am I advocating the provocation of drama and confrontation among team members to create interest during meetings? Actually, yes. When a group of intelligent people come together to talk about issues that matter, it is both natural and productive for disagreement to occur. Resolving those issues is what makes a meeting productive, engaging, and even fun. Consequently, a leader of a meeting must make it a priority to seek out and uncover any important issues about which team members do not agree. Furthermore, when team members don't want to engage in those discussions, the leader must force them to do so. Of course, getting people to engage in conflict when they aren't accustomed to it is a challenge.

After a leader announces to a team that more conflict will be expected from them, and it is critical that this is made clear, there will be a key moment when team members take their first risks in engaging one another in active debate. No matter how much we prepare them for this, it is going to feel uncomfortable. When this happens, a leader can minimize the discomfort and maximize the likelihood that conflict will continue by interrupting the participants and reminding them that what they are doing is good. As simple, even paternal, as this may sound, it is remarkably effective.

## **Problem #2: Lack of Contextual Structure**

The single biggest structural problem facing leaders of meetings is the tendency to throw every type of issue that needs to be discussed into the same meeting. Desperate to minimize wasted time, leaders decide to minimize meetings. They usually hold just one big staff meeting, either once a week or every other week. They sit down in a room for two or three or four hours and hash *everything* out, so that everyone can get back to their "real work."

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Unfortunately, this only ensures that the meeting will be ineffective and unsatisfying for everyone. This happens because some people will want the meeting to be informative and quick, an efficient exchange of data and tactical information. Others think it should be interactive and strategic, providing key analysis and data to make critical decisions. Others would like to step back, take a breath, and talk meaningfully about company culture and people. Others just want to make clear decisions and move on. Who's right? Everyone is, and that's the point. There should be different meetings for different purposes, and each of them should serve a valid and important function.

## *Meeting #1: The Daily Check-In*

This is not necessarily practical for every organization, but for those that can make it work, the Daily Check-in is powerful. The Daily Check-in requires that team members "huddle" together, standing up, for about five minutes every morning to report on their activities that day. Five minutes standing up. That's it.

The purpose of the Daily Check-in is to help team members avoid confusion about how priorities are translated into action on a regular basis. It provides a quick forum for ensuring that nothing falls through the cracks on a given day and that no one steps on anyone else's toes. Just as important, it helps eliminate the need for unnecessary and time-consuming e-mail chains about schedule coordination.

Although a Daily Check-in is not practical or indispensable for every team, it can be a valuable tool for many organizations who want to better align their executives. One of the certain challenges in making the Daily Check-in work will be getting team members to *stick with it initially*, long enough to make it part of their routine. It will be all too easy for busy team members to lobby for abandoning the Daily Check-in before they have given it a chance.

Another common challenge with the Daily Check-in will be keeping it to five minutes. If the meetings exceed their time limit slightly because team members are socializing a little, that's actually okay. If they're going long because team members are trying to address issues every morning that should be discussed at the Weekly Tactical, this is a problem. People will get tired of having what feels like a daily staff meeting.

## *Meeting#2: The Weekly Tactical*

Every team needs to have regular meetings focused exclusively on tactical issues of immediate concern. Whether it takes place weekly or every other week doesn't really matter. What does matter is that everyone always attends, and that it is run with a sense of discipline and structural consistency. A Weekly Tactical meeting should last between forty-five and ninety minutes, depending on its frequency, and should include a few critical elements, including the following:

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*The Lightning Round* — This is a quick, around-the-table reporting session in which everyone indicates their two or three priorities for the week. It should take each team member no more than one minute (sixty seconds) to quickly describe what is on their respective plates. This sets the tone for the rest of the meeting. By giving all participants a real sense of the actual activities taking place in the organization, it makes it easy for the team to identify potential redundancies, gaps, or other issues that require immediate attention.

*Progress Review* — the next key ingredient is the routine reporting of critical information or metrics such as revenue, expenses, customer satisfaction, inventory, and the like. The point is to get into the habit of reviewing progress relating to key metrics for success, but not every metric available. This should take no more than five minutes. Lengthy discussion of underlying issues should be avoided here.

*Real-Time Agenda* — Counter to conventional wisdom about meetings, the agenda for a Weekly Tactical should *not* be set before the meeting. The agenda should be based on what everyone is actually working on and how the company is performing against its goals. Leaders of meetings must therefore have something I call *disciplined spontaneity*, which means they must avoid the temptation to prepare an agenda ahead of time, and instead allow it to take shape during the meeting itself which ensures that the meeting will be relevant and effective.

During the Weekly Tactical, tactical issues are addressed to ensure that short-term objectives are not in jeopardy. There are two overriding goals: resolution of issues and reinforcement of clarity. Obstacles need to be identified and removed, and everyone needs to be on the same page. The temptation to set an agenda ahead of time, formally or informally, must be resisted. It is critical team members come to the Weekly Tactical with an open mind, to let the real activities and progress against objectives determine what needs to be discussed. Team members should not go into too much detail during the Lightning Round, because this causes others to lose interest, which clouds discussion and issue resolution.

Avoid the temptation to discuss long-term strategic issues. There isn't enough time to properly discuss major issues and complex topics. Also, leaders have a tendency to inappropriately reconsider strategic decisions when faced with inevitable tactical obstacles. The key to overcoming this challenge is discipline. Take strategic issues off the table and put them on a list of possible topics to discuss during a different meeting called the Monthly Strategic.

## *Meeting #3: The Monthly Strategic*

This is the most interesting and in many ways the most important type of meeting any team has. It is also the most fun. It is where executives wrestle with, analyze, debate, and decide upon critical

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issues (but only a few) that will affect the business in fundamental ways. Monthly Strategy meetings allow executives to dive into a given topic or two without the distractions of deadlines and tactical concerns.

It is advisable to schedule at least two hours per topic so participants feel comfortable engaging in open-ended conversation and debate. Whether teams decide to have these meetings once a month or every two weeks is not really important; but they must occur regularly so that they can serve as a timely “parking lot” for critical strategic issues that come up regularly during the Weekly Tactical meetings. This gives executives the confidence to table critical issues, knowing they will eventually be addressed.

In some cases, a strategic or critical issue that gets raised in a Weekly Tactical meeting cannot wait for the next Monthly Strategy meeting on the schedule. Still, that doesn’t mean it should be taken up during that Weekly Tactical. Instead, executives should create an Ad Hoc Strategic meeting specifically for the purpose of taking on that issue. It should be clearly separated from the Weekly Tactical so that executives can reset their minds to the nature of the meeting, and so enough time can be allotted for appropriate analysis and discussion.

In many ways, this Ad Hoc Strategic meeting is the most important one that occurs in an organization. It demonstrates that an executive team knows how to identify those rare strategic issues that deserve immediate attention even at the expense of urgent but less important tactical concerns that surface every day. The most obvious challenge in implementing Monthly Strategic meetings (or the Ad Hoc variety) is the *failure to schedule enough time* for them. The idea of carving out three or four hours for one or two issues is harder than it seems in theory. A related challenge has to do with *putting too many items on the agenda*. This is an understandable temptation for executives who want to discuss every issue.

The key to avoiding both of these challenges is to ensure that more than enough time is scheduled for each issue. That means if there are three issues to resolve, the meeting needs to be much longer than if there is only one. If that means clearing everyone’s calendars for an entire day, so be it.

Another challenge in making strategic meetings work is *the failure to do research and preparation* ahead of time. The quality of a strategic discussion, and the decision that results from it, are improved greatly by a little preliminary work. This eliminates the all-too-common reliance on anecdotal decision making. Of course, the leader must also hold team members accountable for coming to the meeting prepared.

Finally, I would be remiss if I didn’t mention a final challenge: *the fear of conflict*. Monthly and Ad Hoc Strategic meetings cannot be effective unless there is a willingness on the part of team members

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to engage in unfiltered, productive ideological debate. This also applies to the final type of meeting which is the Quarterly Off-Site Review.

## *Meeting #4: The Quarterly Off-Site Review*

The executive off-site has earned a reputation as a time-wasting, touchy-feely boondoggle, and in many cases rightly so. This is a shame, not only because of the time, money, and credibility that are sacrificed, but because of the critical role that off-site meetings should play in the context of all the other meetings. Executive off-sites provide executives an opportunity to regularly step away from the daily, weekly, even monthly issues that occupy their attention, so they can review the business in a more holistic, long-term manner.

Topics for reflection and discussion at a productive Quarterly Off-Site Review might include a review of the organization's strategic direction, an assessment of the team's behavior, a discussion about key employees and poor performers in the organization, and a survey of competitors and industry trends.

One of the challenges of effective Quarterly Off-Site Reviews is *the tendency to overburden and over-structure the meetings*, which usually takes the form of tightly scheduled slide presentations and lengthy informational sermons. The purpose of a Quarterly Off-Site Review is to reflect on and discuss the state of the organization, not provide executives with presentations and white papers.

Another challenge is the temptation to make these meetings too much of a boondoggle by having them at exotic locations that require extensive travel, and by including too many social activities. The purpose of getting out of the office is not to entertain the attendees, but rather allow them to step back from daily distractions and interruptions. A comfortable hotel or conference center an hour away is usually enough to do the trick. Flying to Aruba or Hawaii does not eliminate distractions, it merely substitutes one kind (e.g. snorkeling and golf) for another (e.g. work interruptions).

Another interesting problem is *inviting outsiders to attend* the meeting. It may increase input, or involvement and exposure for employees, but it changes the team dynamic and can negate one of the most important reasons for having off-sites: improving team unity. One exception to this rule might be the use of a trusted outside facilitator, which might allow the leader of the team to participate fully in discussions without having to worry about playing a more objective, supporting role.

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## THE FOUR MEETINGS

### *Daily Check-in*

Share daily schedules and activities (5 minutes)

- Don't sit down
- Keep it administrative
- Don't cancel even when some people can't be there

### *Weekly Tactical*

Review weekly activities and metrics, and resolve tactical obstacles and issues (45 - 90 minutes)

- Don't set agenda until after initial reporting
- Postpone strategic discussions

### *Monthly Strategic (or Ad Hoc Strategic)*

Discuss, analyze, brainstorm, and decide upon critical issues affecting long-term success (2 - 4 hours)

- Limit to one or two topics
- Prepare and do research
- Engage in good conflict

### *Quarterly Off-Site Review*

Review strategy, industry trends, competitive landscape, key personnel, team development (1 -2 days)

- Get out of office
- Focus on work; limit social activities
- Don't over structure or over burden the schedule.

## **The Biggest Challenge of All: "The Myth of Too Many Meetings"**

Most of my friends reacted the same way when they heard that I was writing a book called *Death by Meeting*. As you may have done, they assumed I was going to make a case for having fewer meetings. Then, upon hearing about Daily Check-ins, Weekly Tacticals, Monthly Strategics, and Quarterly Off-Site Reviews, you might be thinking, "This is crazy. Where am I going to find the time to do all this? I'm already having too many meetings."

While it is true that much of the time we currently spend in meetings is largely wasted, the solution is not to stop having meetings, but rather to make them better, because when properly utilized, meetings are actually time *savers*. That's right. Good meetings provide opportunities to improve execution by accelerating decision making and eliminating the need to revisit issues again and again. But they also produce a subtle but enormous benefit by reducing unnecessary repetitive motion and communication in the organization.



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Most executives I know spend hours sending e-mails, leaving voice mails, and roaming the halls to clarify issues that should have been made clear during a meeting in the first place. I have no doubt that this is the most subtle, dangerous, and underestimated black hole in corporate America. When we fail to get clarity and alignment during meetings, we set in motion a colossal wave of human activity as executives and their direct reports scramble to figure out what everyone else is doing and why.

It is at once shocking and understandable that intelligent people cannot see the correlations between failing to take the time to get clarity, closure, and buy-in during a meeting, and the time required to clean up after themselves as a result.

## **A Final Thought on Meetings**

Bad meetings exact a toll on the human beings who must endure them, and this goes far beyond mere momentary dissatisfaction. Bad meetings generate real human suffering in the form of anger, lethargy, and cynicism. While this certainly has a profound impact on organizational life, it also impacts people's self-esteem, their families, and their outlook on life. Improving meetings is not just an opportunity to enhance the performance of our companies. It is also a way to positively impact the lives of our people, including us.