

DIGITAL MEETING PRACTICE WITH MICROSOFT TEAMS

An easy and effective way to manage your
recurring decision meetings



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Mikkel Stærk Dickenson
Founder of DecisionCaddy

“Our vision is to help organizations improve their meeting culture by implementing an effective digital meeting practice in their most important decision meetings.”



FIVE PHASES OF MEETING PRACTICE

You are responsible for managing important leadership-, steering group- or committee- meetings. Your organization is using MS Teams, a part of Office 365 which also includes Outlook, Word, and other digital tools you already use to manage meetings today for both virtual and physical meetings.

You probably recognize the following five phases from managing the meetings:



This booklet introduces an effective digital meeting practice, across the above five phases. It addresses use of Office 365 tools, and two 3. party apps, Plandisc and Decisions, which complement Office 365 tools for managing meetings.

Applying the practice will make meeting management easier and improve the effectiveness of your decision meetings.

Start by creating a Team, e.g. for a steering group, with a channel dedicated to meeting management



I. PLANNING

The five phases repeat for every one of your recurring meetings. But before deciding to plan a series of meetings, ask **why** you need these meetings, **what** you want to achieve, and **who** you need to achieve this? E.g. do we need dedicated steering group meetings, or can we obtain the required decisions on the management meeting?

When you know who to invite, you need to decide on **when**, i.e. how often to meet. DecisionCaddy recommends short and frequent meetings, over long and infrequent ones. When meetings are infrequent, it becomes increasingly important to schedule them correctly to ensure participation and the optimal sequence relative to other meetings and activities in the organization.

Consider the following when **planning** recurring meetings:

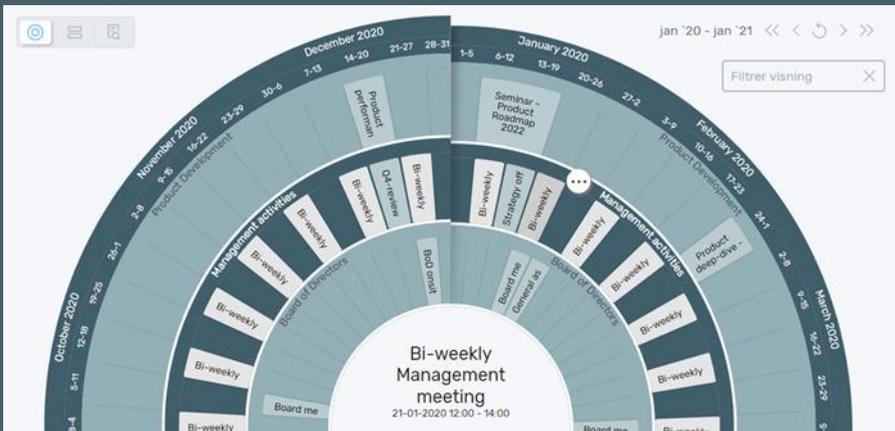
- ✦ Answer the why, what and who before scheduling new meetings. Possibly the purpose of the meeting could be served by adding an agenda item in existing recurring meetings.
- ✦ Start planning well in advance to increase chances of participation of all required participants.
- ✦ Consider the number of meeting participants carefully. Ideally, a decision meeting has 6-8 participants. Each participant above #7 imposes 10% lethargy.
- ✦ Make sure to communicate the existence of the new meetings to relevant colleagues, to accommodate their planning activities.
- ✦ Remember, if your meeting is important, it is also important for other colleagues than those attending the meeting.

DIGITAL TOOLS



Office 365: When planning and scheduling meetings, Outlook is the primary tool used by more than 95% of the organizations we work with. Outlook is particularly useful for checking availability of meeting participants and sending meeting invitations.

Plandisc: A limitation of Outlook is that it doesn't provide a great overview of high level activities, such as budget process and off-sites, across the organization. Even less so for those who are not invited for the meeting or event. For this purpose, DecisionCaddy recommends Plandisc, which integrates with Outlook, and allows for great visualization of high level activities. It ensures cross organizational transparency which is critical for effective planning.



GET STARTED Visit www.plandisc.com to get a free trial and get a cross-departmental overview



II. PREPARATION

The Notice of Meeting including the **agenda**, is the project-plan for the meeting. It communicates the purpose of the meeting, the required outcome, how much time is available for each item, and responsibilities in the meeting. Be explicit about expected outcome for each of the agenda items.

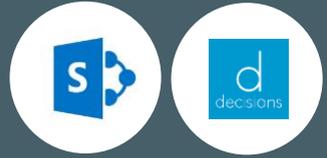
If decisions are to be made it often requires material to be shared ahead of the meeting to increase chances of reaching a high-quality decision. Be sure to share material with relevant stakeholders well in advance of the meeting.

Align expectation among meeting participants of what is considered required level of **preparation**, e.g. is it required to read all shared material ahead of the meeting?

Consider the following when **preparing** the meeting:

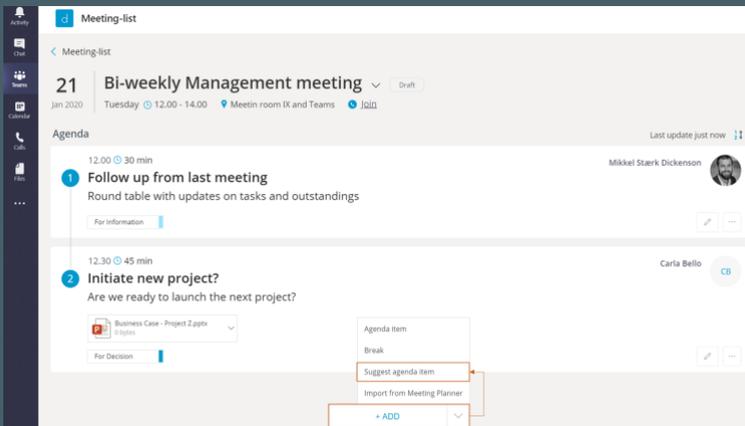
- ✦ Share preliminary agenda with meeting chairperson, and those expected to contribute with pre-reads.
- ✦ Share a template which standardize format of meeting material. Is PowerPoints allowed or only text? Recommendations for decisions could be structured; Summary, Situation, Complication, Proposed solutions, and Next steps.
- ✦ Explain the desired outcome of the meeting and the necessary preparations for each item on the agenda. Place decision-items first, then discussion-, and information-items.
- ✦ Align with participants on their role in the meeting.

DIGITAL TOOLS



Office 365: Teams is the ideal platform for supporting the preparation phase. Use your Team to share information about the upcoming meeting, e.g. share preliminary agenda in the Post tab, link to files or upload them into Files, which will save the files on SharePoint in the cloud. This way you'll avoid numerous emails with different material versions flying back and forth.

Decisions: Decisions' app for Teams makes it even easier to create and collaborate on building the agenda. The app connects meetings in Outlook with your team in Teams. In Teams you can then create the agenda, e.g. use a saved template, and then push the agenda into the Outlook meeting invitations, making it easy for participants to access.



GET STARTED Use the “+” add tab function in Teams to add Decisions' meeting app to your channel



III. MEETING EXECUTION

Well executed meetings deliver the planned outcome within the allocated time. They drive the organization forward, build trust, and provide a sense of achievement.

Regardless whether your meeting is virtual or physical, effective **meeting facilitation** is important and it requires four different roles, owned by 1 to 4 different people in the meeting.

The meeting Chairperson is responsible for reaching decisions and the quality of these. The Moderator uses the agenda to ensure progress, allocates speaking time, shares screen with relevant presentations, and is also often the Time-keeper. The Note-taker will capture agreements; decisions and tasks, and present them before moving on, to ensure alignment and strengthened sense of accountability.

For meetings with an ambitious agenda, execution is more effective when people know each other and there is a certain level of **trust**. Therefore, for newly established leadership teams, allocate a separate time for socializing.

- ✦ Start meetings by presenting the purpose, agenda, and meeting-roles assigned.
- ✦ Capture decisions and tasks in a real-time co-authoring tool, and ensure everyone agrees with the phrasing before moving on to next agenda item.
- ✦ To postpone ad hoc and maverick topics during the meeting, note them under Any Other Business (AOB) on the agenda.

DIGITAL TOOLS



Office 365: Teams is an obvious choice when the meeting is virtual, since it is one of the leading tools for audio-, video-, and screen-sharing. Since the Office 365 platform is cloud based, all the information you capture in Teams, whether using Word, OneNote, or capturing meeting minutes in the Posts tab, is available to all Team members, also those who didn't participate in the meeting.

Decisions: Decisions meeting app is developed to support effective meeting practice. The agenda is available online for all participants and should be shared with all meeting participants and the beginning of the meeting. Decisions shows a time tracker on the left, and it makes it easy to capture decisions and tasks during the meeting.

The screenshot shows the 'Agenda' interface of the Decisions meeting app. At the top, it says 'Agenda' on the left and 'Last update just now' with a refresh icon on the right. Below this, there are two agenda items. The first item is at 12.00 (30 min) and is titled '1 Follow up from last meeting' with the subtitle 'Round table with updates on tasks and outstandings'. It has a 'For Information' status bar. The second item is at 12.30 (45 min) and is titled '2 Initiate new project?' with the subtitle 'Are we ready to launch the next project?'. It has a 'For Decision' status bar and includes a file attachment for 'Business Case - Project Z.p...' (0 bytes). On the right side, there is a user profile for 'Mikkel Stærk Dickenson' with a dropdown menu open, listing options: 'New task', 'New decision', 'My notes', 'New comment', 'Open folder', 'Upload file', 'Add link', 'Move item', 'Move to...', and 'Delete'. The 'New decision' option is highlighted with a red box.

NOTICE Decisions captured with Decisions automatically feeds into a decision log



IV. COMMUNICATION

If your meeting is important, it is also important for **colleagues outside the meeting**. The meeting will only have an effect when relevant agreements, decisions and tasks are communicated timely and consistently from the meeting. Generally, communication to employees is a leadership responsibility, but as a meeting facilitator you can support this critical activity.

Some topics deserve to be communicated in person to the employees, but in knowledge-intensive companies it is important to inform employees as soon as important decisions are made, otherwise they might feel left out and become demotivated.

A traditional Minutes of Meeting in word format, is often ill-suited for communication, e.g. if parts of the minutes are confidential it is time consuming to copy-paste the relevant notes into emails to share.

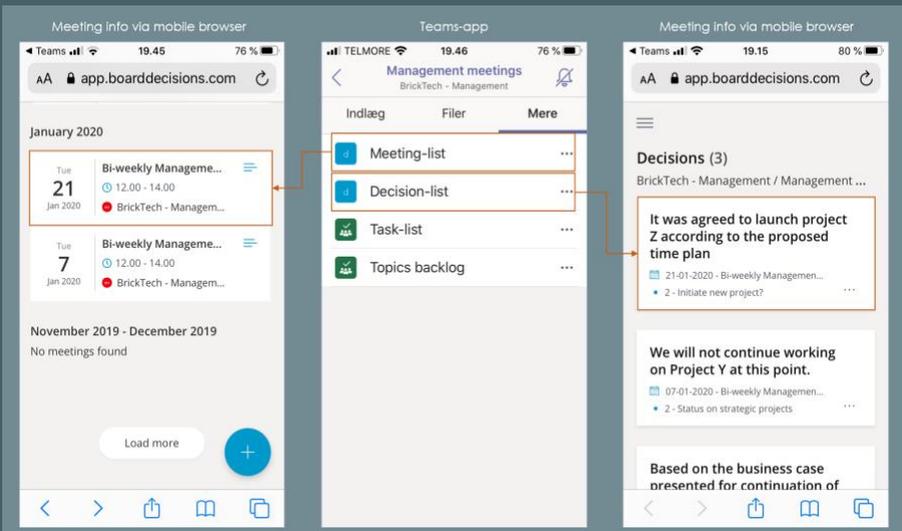
- ✦ Minutes of Meeting (MoM) should be available to absent participants immediately after the meeting.
- ✦ Share important decisions and tasks with relevant employees sooner, rather than later, even if the information is inadequate.
- ✦ Control and rectify if meeting participants communicate inconsistently from the meeting.

DIGITAL TOOLS



Office 365: Teams is suitable for communication between Team-members, but often most of the decisions made should be communicated wider than the Team. The project manager can write posts in other Teams and Channels, post on Yammer or SharePoint, or simply write emails.

Decisions: During the meetings, when adding a decision, it will automatically be linked to the meeting and added to a decision log ensuring traceability. Similarly, when adding a task, it will automatically be added to Microsoft Planner on Teams, showing at which specific meeting and agenda item it was agreed. The information is easily available, e.g. also on tablets and phones.





V. FOLLOW-UP

The time between meetings is when you'll experience the effect of the recurring meetings. When the tasks are completed as agreed, it builds trusts and brings positive energy into the next meeting. To support this positive circle as a facilitator, you should **remind about tasks and follow up on deliveries**. In this phase you will automatically collect **input for the agenda of the next meeting**.

It is important to hold people accountable for the tasks they have committed to. Therefore, lack of execution is a topic for the agenda of the next meeting, but you should also remember to celebrate all the things that have been achieved. Between the meetings, you should:

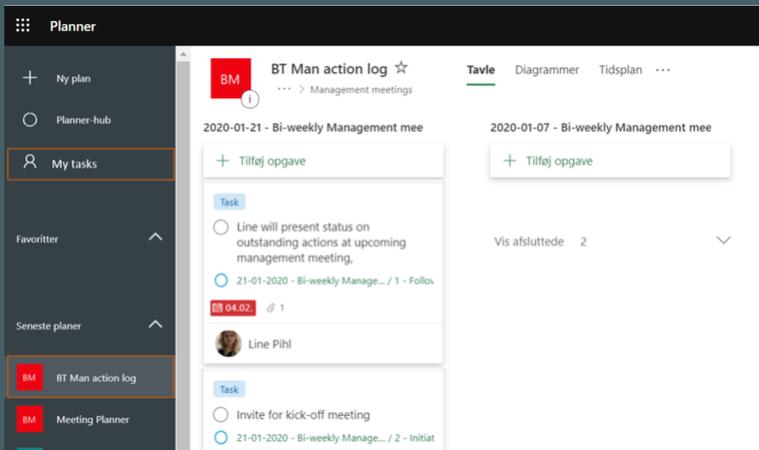
- ✦ Get an overview of which tasks were agreed and assigned at the previous meeting, and decide which are necessary and relevant to follow up on before the upcoming meeting.
- ✦ Be proactive and remind people what was agreed on and allow team members to reflect and comment on any issues or opportunities that have arisen when carrying out the tasks.
- ✦ At the following meeting, bring a list of tasks which were completed since the previous meeting. This allows room for celebration, no matter how small the tasks may be. It is important to state which tasks have not been solved, but if only focusing on those tasks the tone and mood at the meeting can be negatively affected.

DIGITAL TOOLS



Office 365: Microsoft Planner is an increasingly popular tool in Office 365. The tool makes it easy to create, distribute and follow up on tasks for all team members. A senior stakeholder participates in many meetings, and Planner provides an easy overview of tasks received from multiple meetings. Make sure to create a new plan in Planner for your Team, and create a bucket-structure which will fit the purpose of the recurring meetings.

Decisions: An action log for a leadership team or steering group can include tasks originating from several different of the previous meetings. When using Decisions to synchronize tasks from Minutes of Meetings, the Planner tasks keeps a reference to the meeting at which the tasks was agreed. This makes follow up easier, as the responsible participants are reminded about the agreements and feel more accountable.





OVERVIEW

Managing important decision meetings is a lot of work. By working smarter with your Office 365 tools and using Plandisc and Decisions through the five important phases, your work will be easier, and the meetings will be more effective.

Phases	 I. PLANNING	 II. PREPARATION	 III. MEETING EXECUTION	 IV. COMMUNICATION	 V. FOLLOW UP
Platform					
Office 365 e.g.s					
3. party apps					

At DecisionCaddy, we help you and your company achieve an effective meeting practice, by training you and your meeting participants in the five phases and use of digital tools. It is easier than you think.

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