

Don't Just Do Something, Stand There!

Ten Principles for Leading
Meetings That Matter



By Marvin Weisbord and Sandra Janoff
Authors of the bestselling *Future Search*

an excerpt from

***Don't Just Do Something, Stand There!:
Ten Principles for Leading Meetings That Matter***

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Published by Berrett-Koehler Publishers

CONTENTS

Preface		ix
Acknowledgments		xv
Introduction: Making Every Meeting Matter		1
PART ONE: LEADING MEETINGS		13
Principle 1	Get the Whole System in the Room	15
Principle 2	Control What You Can, Let Go What You Can't	31
Principle 3	Explore the "Whole Elephant"	49
Principle 4	Let People Be Responsible	67
Principle 5	Find Common Ground	81
Principle 6	Master the Art of Subgrouping	97
PART TWO: MANAGING YOURSELF		117
Principle 7	Make Friends with Anxiety	119
Principle 8	Get Used to Projections	135
Principle 9	Be a Dependable Authority	149
Principle 10	Learn to Say No If You Want Yes to Mean Something	163

Ten Principles, Six Techniques: A Summary	173
Conclusion: Changing the World One Meeting at a Time	175
Bibliography	179
Index	183
About the Authors	193

Introduction: Making Every Meeting Matter

I want to see progress . . . or it is a waste of time. But that isn't the meeting's fault. That is the fault of the person calling and leading the meeting.

—DARIN HAMER, IT professional, Topeka, Kansas (2006)

Our purpose in writing this book is to help you become more effective in the world through the meetings you lead. You will have a chance to master a few simple practices to enhance whatever works for you now. You will learn to recognize procedures that no longer get results. Above all, you will come face to face with the assumptions you make about meetings. If you are going through the motions anyway, why perpetuate cynicism when you can succeed every time?

If you adopt our principles, you will become fanatical about make-or-break matters like matching participants to purposes; and you will manage the daylights out of mundane matters like time frames, rooms, and seating. You also will develop a new awareness of key factors few people notice. You'll pay more attention, for example, to the emergence of informal subgroups that can derail your meeting in an eye blink. You'll become more aware of what people expect from leaders and of the demands you make on yourself.

What you will *not* do is fret over people's motives, attitudes, and personal quirks. In other words, instead of



RETHINKING EVERYTHING

Thus, we began a transition that took some years. We decided that if the goals were too big for the people, we would not run the meeting. We began turning down requests to squeeze a day's worth of work into 2 hours. We pared down our repertoire to a few structural procedures nearly anybody could follow. We determined to manage meetings in such a way that people could use the experience, skills, and aspirations they already had. Thus, action would be inevitable unless people consciously chose not to act. We adopted a theory about when to jump in and when to just stand there. We committed to a philosophy based on accepting people as we found them, not as we wished them to be.

Along the way, we poured our early experiences into a strategic planning book we called *Future Search* (Weisbord & Janoff, 2000). There we told how we dropped one by one most of the meeting procedures we once relied on. Some of our changes were heretical. We did away with hallowed concepts like conflict management and priority setting. For these we substituted common ground (agreement by all) and voting-with-your-feet (setting priorities based on willing actors rather than good ideas). We focused on dialogue—having all views heard without needing to act on them. We

became alert to those moments when people might scapegoat one another with careless comments, diverting everybody from the task.

We dropped labels like “resistance” and “defensiveness,” choosing instead to see people doing their best with what they had. We stopped listing problems as the first step, building instead toward a comprehensive picture of the whole and a preferred future before deciding what needed to be done. We stopped asking what went wrong and how to fix it. Instead, we substituted “What are the possibilities here, and who cares?”

Managing large groups of dozens or hundreds, we made our unit of change the capacity of the whole for action, not the satisfaction of each person’s needs or the perfection of every small group’s process skills. We encouraged breakout groups to self-manage, precluding the need to have them led by expert facilitators. We stopped assuming that people who said nothing supported the goals and decisions. We paid the most attention to those critical moments when groups were at risk of fragmenting, fighting, or running away.

Under these conditions, people got more done in less time and with greater satisfaction than they ever did when we tried to manage all the details ourselves. The less we did, the more others took over. They did not need to be coaxed into action or provided with complex follow-up strategies. We never tried to change anybody. What we changed were the conditions under which people met. To our surprise, the more we practiced structural change, the better people managed their relationships. Changing a meeting’s structure, we found, was the shortcut for people wanting to change their own behavior.

LEARNING TO STAND THERE

Most of all, we changed ourselves. We let go needing to have all the answers, figure out each group’s problems and

blockages, and keep everybody happy all the time. We taught ourselves to act less and pay attention more. Ours became an alert form of “just standing there,” observing, listening, and inviting people to say what was on their minds without prompting them to be positive, negative, or any way except the way they chose to be.

Recently our friend Dawn Rieken gave us a wonderful description of this way of being—quiet on the outside, active inside. Active on the inside is what we are most of the time. The trick is to change the inner dialogue from anxiety to observing without having to fix everything. Instead, we rely on a theory about what it takes for people to manage themselves. Our theory, which we will get to in a moment, is our security blanket.

There are times, however, when people want to fight or flee the goals, the task, the problem, or decision. At those moments we become visibly active. We move in, saying and doing the least that will interrupt a potential fight, clarify an elusive goal, or pose a choice. In those moments, we learned, we are at our best when we can contain our own anxiety and quiet ourselves inside.

In short, when people work the task, we do nothing overt. When they put themselves at risk of fighting or running away, we calm ourselves and become as active as we need to be to get the meeting back on track.

DISCOVERING DIFFERENTIATION/ INTEGRATION THEORY

Early in our collaboration, we had a rewarding “aha” that made possible this book. Each of us, Sandra in education and psychology, Marv in business and organizational consulting, had relied on versions of the same structural theory. We both were applying differentiation/integration (D/I) theory to our work with students, clients, and even ourselves.

This is not to say that we had the legendary “all-purpose hammer.” A theory is not a method. It’s a way of interpreting reality that helps you act with more certainty. D/I theory helped us make sense of puzzling complexities in a world of increasing diversity, multiple agendas, and non-stop change. For what we aspired to do, that was quite enough.

D/I Defined

Noah Webster’s big dictionary says that differentiating means “to distinguish and classify”—that is, to group similar things together. It also can mean to “isolate, ostracize and segregate.” Likewise, integrating has two faces. In a positive sense, it means “to make one or harmonize”; in the negative, “to centralize and orchestrate.”

To become better meeting leaders, we decided our challenge was to help people differentiate their stakes without excluding anybody and integrate their goals without our forcing unity. Moreover, we came to understand that unless people differentiate their stakes, they are unlikely to act together. Wanting harmony, wholeness, cooperation, and shared goals, we had to start by validating differences. Seeking integrated action, we could not avoid polarities. We had to learn to make them legitimate.

Key D/I Principles

D/I theory has a long history in biology, mathematics, social psychology, and developmental psychology. To begin at the beginning, D/I applies to your earliest moments on Earth. You started life as a single cell that divided and subdivided. Your cells evolved to perform different functions—a beating heart, a thinking brain, a digestive system, each unique in purpose and structure, integrated into a one-of-a-kind working model of a human being.

The organizational analogies should be obvious. Imagine a company that exists to deliver any product or service. Its functions could include research and development, manufacturing, sales, and information systems. They are differentiated, each with its own structural needs. None can accomplish the mission alone. They are faced with a tricky D/I task: holding onto their differences *and* integrating toward a result bigger than any of them. They cannot afford to act in ways that deny the necessity of each.

Our job as leaders/managers/facilitators is to set things up so that people can accept their differences and integrate their capabilities for the good of all. Making the leap from “D” to “I” is at the core of effective meeting management.

Many Practical Uses

In this book, we show you some of the many practical applications of D/I theory that we have made. You can use it to understand why some systems function better than others. You can use it when you plan a meeting, figuring out who to invite and how to use “breakout” groups. From D/I theory, you can derive practical procedures for handling conflict, reaching decisions, and implementing action plans. The first time you apply it, you may come to appreciate key meeting dynamics that were not on your radar screen. You will learn more about when to keep quiet, when to speak, and what to say. You’ll be able to prove to yourself that a few simple actions can keep groups working in the face of inevitable differences.

Nor is this all. From D/I theory, you will gain insight into your own potential for personal growth. You will learn to use it as a lens for your own projections, helping you contain your anxiety in new situations. You will be in a better position to avoid exchanges that “hook” you into responding in ways you later regret. In short, D/I theory will help you gain a new measure of influence over any system. We intend to make the journey easy and illuminating for you.

HOW THE BOOK IS ORGANIZED

This book has two parts, “Leading Meetings” and “Managing Yourself.” In each chapter, we show you the D/I rationale, give examples of effective action, and suggest things for you to try and pitfalls to avoid.

Part One, “Leading Meetings,” covers six principles. “Get the Whole System in the Room” (Principle 1) may change forever the way you organize meetings when fast, committed action is called for. Here we show you how to put those with authority, resources, expertise, information, and need in the same conversation. Whether they act or not, they cannot avoid responsibility.

“Control What You Can, Let Go What You Can’t” (Principle 2) offers guidance on how you can optimize output by managing a meeting’s boundaries—its purposes, time frames, meeting conditions, list of invitees, working group size, shifting coalitions, agenda, and spectrum of views.

“Explore the ‘Whole Elephant’” (Principle 3) can save you endless time and the misunderstandings that occur when people leap into problem solving and talk past one another. We show you ways to look at all aspects of a situation before acting on any one part.

“Let People Be Responsible” (Principle 4) provides you with a key philosophical perspective that will help you manage meetings without feeling the pressure to diagnose group norms or to “psych out” people’s motives as a condition for building commitment.

“Find Common Ground” (Principle 5) offers advice on helping people discover values, ideals, and purposes shared by everyone present regardless of differences. We suggest a new approach to problems and conflicts when common ground is your goal. We treat them as information rather than action items, getting them into the open, validating them, and moving on without resolving them.

“Master the Art of Subgrouping” (Principle 6) will put into your hands a little-known structural method that

keeps groups whole, on task, and open to new ideas. You will learn to tell the difference between functional subgroups and those based on stereotypes and how to use informal subgroups to head off conflict.

Part Two, “Managing Yourself,” contains four principles to help you make yourself a better leader. We write about the benefits of mastering them and some ways to practice the new behavior implied by “just standing there.”

“Make Friends with Anxiety” (Principle 7) redefines an unpleasant dynamic as “blocked excitement.” You will learn the benefits and procedures for containing anxiety in yourself and in a group, turning it to creative action.

“Get Used to Projections” (Principle 8) presents a practical, albeit unusual, program for managing yourself. We will help you accept your “projections,” the loved and hated parts of yourself that you find reflected in other people. The more parts you know, the greater the variety of human beings you can work with. This is a key step to not “taking it personally,” that facile advice we give ourselves, often to no avail. We will show you how to use this awareness to ease your path when working with diverse groups whose members are projecting onto you and each other.

“Be a Dependable Authority” (Principle 9) differentiates the authority that leadership confers from authoritarian behavior. One pitfall we will help you avoid is responding inappropriately when other people project their concerns onto you, making you the (unwitting) stand-in for parents, teachers, bosses, siblings, and others they may have once idolized or loathed.

“Learn to Say No If You Want Yes to Mean Something” (Principle 10) provides support for a vastly underrated skill—saying no to unrealistic requests and expectations for “outcomes” and “deliverables” any time you suspect them to be unreachable.

In the conclusion, “Changing the World One Meeting at a Time,” we summarize some of the benefits of the philosophy, theory, and practices we have presented. Also included is a bibliography of all referenced authors.

Leading Meetings

Get the Whole System in the Room

Control What You Can, Let Go What You Can't

Explore the "Whole Elephant"

Let People Be Responsible

Find Common Ground

Master the Art of Subgrouping

These chapters present our views on how to plan, organize, structure, lead, manage, and facilitate meetings. Whether you assume responsibility for a meeting's content, its agenda, its processes, and/or its results, you may find some useful tips and traps. We believe that most of our ideas are applicable whether you have formal authority or not.

Please notice that we use the generic term *leading* to cover *all* possible roles you might assume. Anytime you convene a group, or stand up in front and direct the proceedings, or take over briefly to make a presentation, or facilitate a conversation, you are *leading*, regardless of your relationship to the participants, position in the hierarchy, or role in society. You still have choices to make. These include

- whether you think the goal is reachable given the people in the room (Principle 1);

- figuring out what aspects you can influence and which ones you can't (Principle 2);
- how to bring into the conversation all relevant information so that opinions can be formed, problems solved, or decisions made in a way that will satisfy the situation (Principle 3);
- the extent to which you are willing and able to share responsibility with others who also have a stake in what happens (Principle 4);
- whether or not finding common ground will be a useful precursor to future action (Principle 5); and
- how and when to pay attention to subgroups so as to keep people working on the task (Principle 6).

Get the Whole System in the Room

At a meeting a few years back, we presented a case study of IKEA, the global furniture retailer, where 53 people had in 3 days decentralized a global system for product design, manufacture, and distribution (Weisbord & Janoff, 2005). The plan was developed by people from 10 countries and from all affected functions. Customers and suppliers participated, as did the CEO, who signed off on it immediately. The group formed implementation task forces on the spot. Two years later, the business area manager for seating reported that IKEA had transformed its product strategy and now routinely brought product developers, suppliers, and customers together early in the process.

At the end of our talk, one consultant, minimizing this significant achievement, called out, “Well, of course you were able to do all that in 3 days. Look who you had in the room!”

Well, she had a good point, and that is the theme of our first chapter.

Since Marv first proposed “the whole system in the room” as a key step for fast action in 21st-century organizations, this principle has influenced meetings all over the world (Weisbord, 1987, 2004). He derived this idea from studying his own consulting projects over many decades, noting the shortcomings of both expert and participative problem solving as the pace of change accelerated. Many methods that once worked now seemed to lag people’s

growing aspirations for both systemic (rather than single-problem) solutions *and* for greater inclusion of people in using what they knew (in addition to expert input). Marv concluded that “getting everybody improving whole systems” was the great challenge for a new century. We needed to find methods enabling *everybody* to improve their own systems without having to become systems experts themselves. Experimenting with simple ways to do that, we and many others noticed that including all the relevant people in each meeting produced faster action on problems, decisions, policies, and plans than any other strategy. Moreover, this principle led to greater personal responsibility at all levels. If the participants didn’t act, they had only themselves to blame. Whatever meeting methods they used were secondary.

In this chapter, we give you a simple way to think about a “whole system” for any task and suggest how to match the people to the task. Our goal is to enlarge your thinking about what’s possible. We want you to consider the idea that no task is too complex *if* the right people can be brought in on it. This will be true for long meetings or short ones. There are literally thousands of meetings held each day in which people, lacking key participants, cannot use their skills, experience, or motivation. Your meetings need not be among them.

While writing this chapter, we asked several colleagues how they had used the whole system principle. The examples described here illustrate the many ways you can define a system and how inviting the right people can lead to extraordinary results.

SIX PRACTICES ESSENTIAL FOR IMPROVING WHOLE SYSTEMS

1. Define the “Whole System”

Define your system in relation to each meeting’s purpose. For any issue there will always be a core group supple-

mented by relevant others. We put “whole system” in quotes because you are unlikely to get every last person. Fortunately, you don’t have to. What you need are diverse people who among them have what it takes to act responsibly if they choose.

Think of the right mix as the people who “ARE IN” the room. (A friend pointed out this acronym to us years after we first wrote it on a flipchart, exactly in the sequence you see here! Who says there is no order in the universe?)

We define a whole system as a group that has within in it various people with

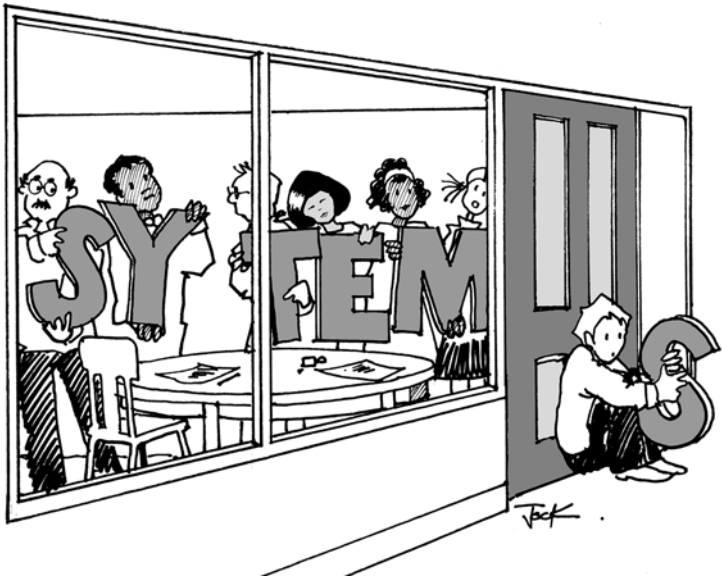
Authority to act (e.g., decision-making responsibility in an organization or community);

Resources, such as contacts, time, or money;

Expertise in the issues to be considered;

Information about the topic that no others have; and

Need to be involved because they will be affected by the outcome and can speak to the consequences.



When you define a system to make sure the right people “are in,” you enlarge its boundaries. You draw a bigger circle around your community, organization, or topic to include key people who may never have worked together. You offer every person a chance to discover the whole by creating a mosaic from what they already know. You make “systems thinking” experiential rather than conceptual. Indeed, the nature of the whole cannot be understood fully by anyone unless all participate. Nor can people be expected to act responsibly without understanding the impact of what they do. Having a “whole system” in the room opens doors no one has walked through before.

—EXAMPLE—

Influencing a Nation’s Conservation Policies

“When I worked in natural resources management for the Southern African Development Community, I arranged many workshops for senior conservation officials,” said Steve Johnson of Botswana’s Department of Wildlife and National Parks. “Most workshops were week-long and held in a site that represented a natural resources management topic under discussion. After running a number of these, we found that having just conservation officials meant preaching to the converted.

“So I changed course. I invited ministers, permanent secretaries, and directors from other ministries such as finance, commerce and industry, agriculture, tourism, and land affairs, the private sector, tribal chiefs, and other community members. Essentially we got ‘the whole system in the room.’ Suddenly we had action—to such a degree that a minister from Mozambique proposed a formal Community Based Natural Resources Management Policy in his parliament. The policy was developed the following year. He then asked for a similar workshop for his Mozambican Parliamentary Standing Committee—

a cross-sectional group of parliamentarians—which led to one of the stronger natural resources processes in all of southern Africa.”

2. Match the People to the Task

No issue is too large or too small so long as the task is within the capability of those who attend.

—EXAMPLE—

Renewing a Day Care Center

A small district on the north shore of Oahu, Hawaii, involved diverse stakeholders in a planning meeting that would have major impact on local health care, highway safety, the high school curriculum, and many other matters. People became aware, for example, that the community had lost its only day care center for lack of funds, causing a crisis for 30 small children and their families. Two participants, a school cafeteria cook and a retired telephone lineman, inspired by their neighbors' energy, decided to call their own meeting of parents, teachers, and concerned citizens. Within 3 months, after several more sessions, they found new funding and reopened the day care center. Nine years later they had expanded to three centers and were still holding “whole system in the room” meetings to solve problems.

The more far-reaching your objective, the greater your need for a broad selection of diverse players.

—EXAMPLE—

Reducing Gridlock in the Skies

In early 2004, the U.S. Federal Aviation Administration (FAA) faced a terrible prospect: gridlock in the skies by

summer unless users of the national airspace could agree on new procedures. For years experts had met to address increasing aerial congestion, only to end with conflict and indecision. This time FAA executives decided on an unprecedented meeting that would include all airspace users—airlines large and small, freight carriers, the military, business and private pilot groups, pilots' and controllers' unions, and others concerned with air traffic. Jaded by years of frustrating encounters, they rehashed stories of the system's growing complexity.

Then a realization dawned on everyone. The relevant players were all present. If this group could not act, no one else would! Vowing at last to "share the pain," they agreed to radical course corrections in the way air traffic is managed. Among other actions, they changed a decades-old norm of assigning airspace priority to aircraft, agreeing that the FAA, the only stakeholder with a systemwide view, would parcel out short delays to multiple flights across the country whenever necessary to minimize long delays at backed-up airports. With everyone present, it took just 18 hours to make badly needed system changes. (Weisbord & Janoff, 2006)

In the preceding example, all the decision makers and implementers shared the problem and its solution. Though they took on a momentous task, they had among them the capability to pull it off. Often, however, the task is too big for the people involved. Perhaps the most common planning error on planet Earth is convening groups to do tasks with key actors missing. This results in a well-known ritual widely reported in the newspapers. A position paper is written. A group of high-level authorities endorse a course of action. Experts agree on what's best for everybody else. Many people assume that if big names or experts bless a plan, anyone who sees it will salute and start implementing. This happens so rarely it's a wonder people waste time and money repeating such folly.

—EXAMPLE—

Experts + Money = 0

A state health agency known to one of our colleagues wished to establish a new policy for addressing teen alcohol and drug use in communities of color. They invited a task force of addiction experts (*Expertise*) and key funders (*Resources*) to study the issue. After deliberating for months, the task force proposed an excellent plan centered on school-based education and a peer-to-peer prevention model. It was promptly undermined by those who were not in the loop—community center service providers (*Information*), administrators and decision makers in education and substance abuse agencies (*Authority*), and teens and families (*Need*). None had been in the planning.

3. Match the Meeting's Length to Its Agenda

Effective whole system meetings do not have to be 3 days in length. You can use short time frames when (a) the agenda is narrowly focused, (b) many others have already spent time working on key issues, and/or (c) the objective is noncontroversial but not well understood. In such cases, what you seek is shared agreement, the next steps people will take, and structures for moving forward.

—EXAMPLE—

Focusing Public Policy on Children's Lives

The Maine Children's Cabinet, five departmental commissioners chaired by the state's first lady, in 2003 identified reducing Adverse Childhood Experiences (ACE) as a top state priority. Maine's Department of Health and Human Services determined to use new research to influence state policymakers and stimulate community action on behalf of children and families. Richard Aronson,

M.D., medical director of Maternal and Child Health, realizing that this ambitious goal required support from many agencies, organized two intense 2-hour meetings. Each involved a dozen key people who among them had what was needed to act but had never met all at once:

- academic experts from the University of New England;
- public health nurses;
- representatives of the Women, Infants, and Children (WIC) program;
- Child Abuse Action Network workers,
- members of the Child Death and Serious Injury Review Panel;
- State Department of Health and Human Services staff;
- State Department of Education personnel;
- and
- State Department of Corrections staff.

Sitting in a forum where all views could be heard, they advanced significantly the joint planning needed to translate research into public policy. The State Health and Human Services Department and the University of New England, for example, agreed to explore a community-based research partnership. The meetings also led to a presentation on the ACE research to the Children's Cabinet itself, with the strong support of the first lady. Another outcome was a statewide forum on Adverse Childhood Experiences and Resiliency, resulting in action that will integrate research into clinical practice.

Aronson has run many such meetings from an hour to several days using whole system principles. Asked how he gets so many busy people together at once, he commented, "I've stopped using the word *meeting* because for so many people, it carries a negative connotation. Instead, I invite people to join a 'dialogue,' 'action-oriented conversation,' or 'gathering.'"

4. Give People Time to Express Themselves

When the agenda directly affects many people's lives and work, longer meetings become necessary even when the topic is limited to changes in organizational policy and procedure. Whether broad or narrow, when people have strong feelings about what is happening, they need time to come to grips with their feelings before they will "own" the needed action steps.

—EXAMPLE—

Challenging the Status Quo

The Internal Revenue Service (IRS), the national tax collector whose "customers" include every money earner in the United States, had a 15,000-person division dealing with public questions by phone and mail. After an internal merger, executives wanted to foster greater cooperation between headquarters staff and field operations. They called a 3-day meeting of 32 key people:

- field operations directors,
- field planning managers who interact with HQ staff,
- HQ senior managers, and
- top executives.

With all key actors involved, the group made immediate changes to its field review processes, installed a new system of weekly voice mails to all managers, set up quarterly staff follow-up meetings across functions, and developed a new reporting structure. What might previously have taken months was implemented in a few days. The meeting was managed by Susan Berg and Mark Smith.

It was not stress-free, said Berg. "We had two highly charged preconference steering committee meetings to identify key issues. We also worked with the director

and deputy director in advance to help them get feedback from the steering committee on systemic concerns. Day 1 was tough, as people poured out their feelings about the past, something they needed to do before they could focus on positive experiences. There was a long pause as the group ‘stewed’ in the mess. Then they made a joint decision to move forward.

“Day 2 was energetic and action oriented. Commented one executive afterward, ‘We needed Tuesday to get to Wednesday!’ During the meeting, people said that they had never had a real dialogue before, talking openly about what was and wasn’t working for them. By day 3, people were in down-and-dirty action planning, talking about what they needed to change.”

5. Manage Meetings Using D/I Principles

Three procedures cover most of the situations we encounter:

- To enable *differentiation*, we ask people to speak individually or to work in groups where all share a functional similarity. For example, if the task is strategic planning in a school, we want to hear from teachers, administrators, staff, parents, and pupils, each group clarifying their stakes.
- To help people *integrate* their diverse perspectives, we have people work in mixed groups that cover the spectrum of those present.
- When we use small groups to help people *differentiate* their stakes, we usually engage the whole group in the task of *integrating* what they have learned. We always ask small groups, whether functional or mixed, to report to the whole. When we work with a large group, people often clarify their own ideas and make integrating statements after they have heard reports from all the small groups.

Using these D/I-based practices, we are able to design and manage task-focused meetings for any purpose, so long as we have the right people given the purpose.

—EXAMPLE—

Solving the Hospital Emergency Room Mystery

The head of primary care in a large hospital determined to train medical professionals to become integrative program managers. He organized an experimental workshop for some 20 administrators, clinical pharmacists, nurse-practitioners, and physicians who worked together daily. They had never collaborated in managing their work systems or given it much thought. Each profession had assumptions about its own role and the roles of all the others that none had ever investigated. In short, they often stereotyped one another.

In a key exercise based on D/I principles, the group was given a thinly disguised case known to most, a woman who came into the emergency room with severe dizziness.

The woman told the admitting clerk that she was taking “pressure pills” four times a day. A nurse-practitioner found in the files a prescription written 2 weeks earlier. Except for low blood pressure, the nurse could see nothing wrong. A medical resident agreed. “Just get her to take her pills,” said the doctor. “You’ve got to educate these people.” The nurse pointed out that the patient took the pills for months and was fine until now. Then she noted a curious discrepancy. The label on the patient’s medicine vial called for a different dosage than what was in the records.

“The pharmacy messed up again!” said the nurse. “I’m calling them.”

“Don’t bother,” said the resident. “They don’t listen. Give her a new prescription.”

The nurse wrote and the resident signed a new Rx. A few days later the woman came back after a fainting

spell. She had with her two bottles of the same medicine under different names. A resident physician called the pharmacist who found two prescriptions written 2 weeks apart, one generic, one brand name. The patient thought she was taking two medicines.

“You should have caught this!” said the resident to the pharmacist. “Don’t you talk to your clients?”

The pharmacist said that the woman told him she knew what to do. “This is what happens,” he added, “when doctors just countersign Rx’s and don’t really evaluate a case!”

At that point the screening resident called the clinic resident, and both agreed it was the nurse’s fault for not taking the first bottle away from the patient. Said the nurse, “This only happens when physicians sit around in little offices reading journals!”

The case drew rueful smiles. Rather than address their conflicts, we asked people to differentiate into four functional groups—nurse-practitioners, pharmacists, physicians, and administrators. Each group was asked to “diagnose” the situation. How did the patient get into trouble? Each profession had its own point of view, albeit limited.

Next, to integrate their perspectives, we had people reorganize into five cross-disciplinary groups of four persons each. The new groups were asked to make a “responsibility chart” such that this situation could never happen again. To each professional involved in the case, they were asked to agree on one of four designations:

- the letter *A* for “final authority,”
- *R* for “responsibility to act,”
- *S* for “support with resources,” and
- *I* for “must be informed before action is taken.”

All groups presented creative solutions. A stunned silence followed the last presentation. No two responsibility

charts were alike. One of the physicians rose from his chair, clapped a hand to his head, and said, “Can you believe it? There’s no right answer to this!”

In fact, there were five “right answers,” each an integrated solution agreed to by a group of diverse professionals. The solution lay not in an ideal procedure but rather in everyone understanding one another’s experience and deciding together how best to serve the patient. Each professional knew more about the emergency room system by the end of the exercise than any of them knew at the start. The process required about 3 hours.

6. Use the “3 by 3 Rule” If You Can’t Get the Whole System

This is not rocket science. Get any three levels and any three functions into the same conversation on any issue of mutual concern. You will gain a better resolution much faster if you provide people firsthand access to the other parts of the systems on whose behavior they rely. The underlying concept is that you can only change a system in relation to the larger system of which it is a part. That is why “team building” creates better work teams without improving whole companies. Every team meeting gives rise to many more meetings before the work done at the center impacts the whole.

—EXAMPLE—

“Where’s Your Boss in All This?”

The management team in a small division of a large company met to improve their effectiveness. Within a few hours, it became plain that their hands were tied for lack of cooperation with the large, centralized corporate quality, finance, and human resource staffs. Each was run by a peer of the division president, and all reported to the big company’s COO.

As the frustration built, one manager blurted out to the president, “Where’s your boss in all this? He’s the only one who can help us.” During lunch, the president phoned his boss, who showed up an hour later. He listened for 20 minutes to a litany of annoying practices that defeated his call for close cooperation between staff and line. After a few pointed questions, he excused himself and got on the phone to each of the other departments. When he returned, he said, “I think we’re on the right track now.” Next day, he convened a meeting of the division and staff executives. After months of frustration, the situation—following a three-level dialogue—was on its way to resolution within 24 hours.

PRINCIPLE 1: In Summary

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Define a “whole system” as those who have among them authority, resources, expertise, information, and need. Get the right cross section if you want action on problems and decisions without a lot more meetings.

Suggestions for Your Next Meeting

- Define the whole system in light of your goal. Use the ARE IN checklist. Who has formal authority? Resources? Expertise? Information? Need?
- Match the people to the task. Make a note on your expected outcome. For each of those who ARE IN, note the consequences of leaving them out.
- Match the length to the agenda. How much time do you think you need? Be honest. Be realistic.
- Give people time to express themselves. How will you take advantage of the diverse perspectives in the

room? (In future chapters, we present many methods for doing this.)

- Use differentiation and integration in your plan. Think about when to ask people to work alone, in small groups, or in the whole group. Remember that you can't integrate unless people know all the range of possibilities. So get it all out early if you want to make progress.
- Try the "3 by 3 Rule." Pick a problem or decision that involves more than one department or function. Get any two other functions that have a stake and/or three organizational levels, preferably both. Pick a goal that is realistic for the time available.

this material has been excerpted from

an excerpt from

***Don't Just Do Something, Stand There!:
Ten Principles for Leading Meetings That Matter***

by Marvin Weisbord and Sandra Janoff
Published by Berrett-Koehler Publishers

Published by Berrett-Koehler Publishers
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