



**WEBINAR - CHECKLIST FOR PROJECT
MANAGEMENT MEETINGS**

DIAL 888-650-1507
START TIME: 5 MINUTES AFTER THE HOUR
WE'LL GO FOR 20 MINUTES UNTIL 25 PAST

Brad Volin



AGENDA

- Intro's
- Challenges / Goals
- Planning
- Meeting structure
- Agenda template
- Disagreements
- Take-aways

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INTRODUCTIONS

- President, Adigo
- Experience at Public and Private companies
- Started as a Product Manager

Some HIGHLY effective Project Meetings☺

Many not ☹

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TYPICAL ACTUAL SCENARIO

- Ego?
- Challenge the leader
- Politics??
- Diversity
- 2nd guess implementation
- Turf battles



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PROBLEM: DELAYS

- Half way implementations
- Scape goats
- Risks not known
- Schedule changes
- Changing direction and strategy
- Does bad news flow up?



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RESULT:

- Finger pointing
- Poor implementation
- Good or Great?
- Lack of buy-in
- Distrust

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MORAG BARRETT'S CHANGE CHARACTERS

- **Ally** – looks out for you and is invested in your success. Unconditional relationship that goes beyond the transactional.
- **Supporter** – cheers you on and provides positive feedback when asked. *A network of supporters may result in complacency.*



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MORAG BARRETT'S CHANGE CHARACTERS

- **Rival** – Competes with for resources and rewards. May be for or against you depending on agenda.
- **Adversary** – Can be overt/covert in efforts against you. Consistent antagonism.





DEALING WITH CHANGE CHARACTERS

- **Nurture allies** – initiate high-quality, intentional interactions.
- **Rally supporters** – strengthen your connection and move them into “ally” position.
- **Manage rivals** – manage potential volatility. Understand your rival’s perspective and anticipate when he/she may be against you.
- **Address adversaries** – consider strengthening allies, supporters and rivals. Don’t waste time or energy confronting an adversarial relationship head-on.



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PRE-CHANGE RELATIONSHIP BUILDING

- **Align:** specify rules of engagement, address work style, outline decision-making procedures.
- **Adjust:** Give feedback, correct the course, or as a last resort – say goodbye.
- **Baggage:** Apologize, forgive, and name the elephant (or adopt the elephant!) in the room.
- **Applaud:** Say thank you, celebrate successes, and tell them “I am your ally.”



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#1: PLANNING – CHEATING **IS** ENCOURAGED!



- Don't go Blind!
- Leader does pre-meeting
 - Ground rules for level of prep, expectations
 - Focus on issues requiring coordination
 - Decisions/approvals: clarify trade-offs, criteria
- Attendees
 - Contributors
 - Guests (internal), if positive (near roll out): evangelize, advertise, if convenient
 - Decision Makers.

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STRUCTURE

- Mornings, or alternate if different time zones
- 90 minutes max
- Rotate topics if longer time needed
- Distribute agenda 2-3 days prior
- Presentation 1stThen Discussion
- Display notes in real time
- If major issue or crisis, welcome the elephant into the room (acknowledge the issue early).
 - But handle it offline
 - Committee! Non-profits do this very well
- Consistent and regular format is critical for speed

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AGENDA – TEMPLATE IT!

- Robert's Rules (without the formality)
- Must-haves:
 - Apologies
 - Actions from last meeting
 - Status updates:
 - Internal communication needed? (department/company wide)
 - Focus on dependencies
 - Areas for optimization
 - Risks and Issues
 - Scope, specification, phases, goals



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AGENDA – PART 2

- Schedule
- Quality
- Budget Review
 - Financial
 - Other Resources
- Next meeting
 - Action items



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AGENDA – OPTIONAL

- Decisions
 - Who and where is the Decision Maker?
 - Is available data enough?
 - Separate meeting just for decision?
 - Discussion focused (otherwise take an offline vote)
 - Risk assessment
- Improvement
 - Scoring
 - Changes – try something new on a regular basis
 - Feedback mechanism for leader

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DISAGREEMENTS

- Take a break
- #1 – Scope. Is it fully understood?
- Stop. Identify next steps:



Later, in a different meeting with the right people and proper format

- #2 – Possible solutions >>
 - Offline
 - Identify other resources needed
- #3 – Root cause analysis, and fix

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DOCUMENT!

- Recording - so easy!
- Notes are best done live with everyone viewing
- Date and Attendees
- Agenda
 - Discussion points
 - Action items

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Take-aways

1. Pre-plan so no surprises
2. Consistent structure, agenda
3. Focus on areas of coordination
4. Clearly outline decision trade-offs
5. Score and improve it!



QUESTIONS?

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How helpful was this? 1 (not much) – 5 (super)

For links, details and references, see our blog:

<http://blog.adigo.com/>

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