How to Change Meetings from Transactional to Transformational

UCSF School of Medicine
Culture of Leadership Initiative
Meeting Optimization Program

Agenda

Outcomes: By attending this program, I will have the tools to:

1. Transform a meeting into a highly productive use of people's time
2. Use meetings as transformational events that will:
   • Cement and enhance relationships
   • Create new solutions to complex problems
   • Create a shared commitment to getting work done
3. Create an interactive meeting environment where all voices can be heard

Objectives:

- Describe appropriate reasons for setting up a meeting
- State key steps to effectively prepare for a meeting
- Describe components of effectively running a meeting
- State key steps to effectively close and follow-up from a meeting

Recommended Reading:

1. *What’s the Secret to Running Effective Meetings?* (12 min Institute for Healthcare Improvement)
   [http://www.ihi.org/education/IHIOpenSchool/resources/Pages/Activities/PozenMeetings.aspx](http://www.ihi.org/education/IHIOpenSchool/resources/Pages/Activities/PozenMeetings.aspx)
2. Leadership Lesson: Tools for Effective Team Meetings – How I Learned to Stop Worrying and Love My team (AAMC)
   [https://www.aamc.org/members/gfa/faculty_vitae/148582/team_meetings.html](https://www.aamc.org/members/gfa/faculty_vitae/148582/team_meetings.html)
3. Sample Inclusion Ground Rules
<table>
<thead>
<tr>
<th>Time</th>
<th>Topic/Activity</th>
<th>Who/What</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-2 min (2 min)</td>
<td>Introduction to MOP and workshop objectives</td>
<td>Anda</td>
<td>Set context.</td>
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<tr>
<td>2-9 min (7 min)</td>
<td>What is the worst meeting you’ve attended in the last two weeks and why?</td>
<td>Anda, Beth scribe</td>
<td>Participant engagement</td>
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<tr>
<td>9-15 min (6 min)</td>
<td>What makes a good meeting? What are strategies to address bad meeting practices?</td>
<td>Anda, Beth scribe</td>
<td>Participant engagement/Learning</td>
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<tr>
<td>15-60 min (45 min)</td>
<td>Assigned role play</td>
<td>Beth</td>
<td>Participant engagement/learning and application</td>
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<tr>
<td>60-70 min (10 min)</td>
<td>Discuss specific strategies to try for the next meeting you attend or lead</td>
<td>Anda</td>
<td>Commitment</td>
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<tr>
<td>70-75 min (5 min)</td>
<td>FEEDBACK</td>
<td>Anda</td>
<td></td>
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