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Managing Meetings

Greetings From Carol Stone

Meetings make up a significant part of the Value Analysis Professional's day and managing each to a positive outcome is a critical part of the job. We all know when we've been part of a successful meeting. We don't always know how we got there.

This issue of the newsletter focuses on managing meetings. In it, we've tried to include a variety of tips, skills and tactics that we think can help you make the most of your next meeting, whether it's a quick encounter in the hallway or a formal review with vendors, colleagues or clinicians. In addition, we have a few suggestions from our featured "Viewpoint" guest, Joyce Chavez, Clinical Resource Manager at Hoag Memorial Presbyterian Hospital, who admits to spending 30 percent of her time in meetings and has some interesting insights gained through her 30-plus years experience in the healthcare field.

Speaking as one who seems to spend much of her time in meetings, I think you will find this issue particularly useful. And, as always, if you know others who could use this issue -- and, by extension, our newsletters on a regular basis – please feel free to email me at carol.stone@crbard.com and we'll add them to our mailing list.

Carol Stone

Carol Stone
Vice President, Corporate Marketing
C. R. Bard, Inc.

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Managing Meetings

Theoretical Perspective

"The conventional meeting – team members sitting together in a room and talking – is the ultimate and the archetypal Same Time/ Same Place technology. For vividness, clarity and social strokes, nothing will ever take its place." Harvey Robbins/Michael Finley, ***The New Why Teams Don't Work***

Love 'em or hate 'em, meetings are part of everyone's work day world. Executives can spend as much as 50 percent of their time in meetings and studies indicate that 10 percent of that time – an estimated 24 work-days a year – is wasted on meetings that are unnecessary, unproductive or both.

Purpose Drives Action

By definition, a business meeting consists of people coming together for the purpose of resolving problems or making decisions. A hallway encounter can be a meeting. But most are more formal, at a pre-arranged time and place, with a clear purpose and an agenda of items to be discussed that is circulated in advance.

The primary purpose of any meeting is to exchange information. It could be through brainstorming ideas, communicating vital details, planning a strategy, making decisions, training/instruction or solving problems. However, each meeting has its own purpose, not to be confused with subject, or the topic to be discussed. Subject is a thing. Purpose provides action. It is purpose that drives everything about the meeting: who should attend, the agenda, location, materials and equipment, pre-meeting lobbying, and the need or direction for follow-up.

Kinds and Categories

Broadly speaking, there are two kinds of meetings: formal and informal. Formal meetings follow fairly rigid formats, utilizing such guidelines as *Robert's Rules of Order*, proscribed protocol and a strict regimen of record-keeping. Examples include board meetings, standing or ad hoc committees, public or external meetings, conferences and annual or extraordinary general meetings.

Day to day, most business meetings are of the informal variety, although they may utilize some of the protocols of the formal kind. The most common are:

- Impromptu meetings, held on short notice. Good for discussing issues quickly and best used to solve minor problems or for urgent announcements where face-to-face interaction may be beneficial.
- Small informal meetings, planned and scheduled requiring preparation by both holder and attendees. Useful for discussion, problem-solving or providing feedback.
- Brainstorming meetings, also planned and scheduled, with the defined purpose communicated in advance so attendees come prepared to take an active part. Most effective with a small group of people representing a range of approaches and expertise.

With all the electronic alternatives, the idea of meeting in a group, face-to-face, might seem archaic. However, meetings can be a very effective way to conduct business, bringing together a number of people for a short period of time so that large amounts of information can be shared, discussed and acted upon – with the added bonus of providing "face time" in an increasingly electronic world.

What's the Purpose?

Being clear on the objective of the meeting will sharpen its focus and therefore improve efficiency. Here are the basic meeting types and their purpose:

- Progress – to assess status and accomplishments and to set more goals
- Decision – to develop and agree upon a decision
- Agreement – to present a case on a decision and seek collective acceptance
- Information – to communicate information or decisions that have been made
- Opinion – to collect viewpoints and perspectives from participants
- Instruction – to provide direction, enhance knowledge, or to teach a skill
- Review – to analyze some aspect of the project, such as design

From *Project Management* by Gary Heerkens

Managing Meetings

Practical Perspective

"Meetings and events can be a total waste of time, or they can be powerful and productive communication tools that solve problems, stimulate ideas, promote team sprit, and generate action. The end results lie totally in how they're run." Susan Friedmann, ***Meeting and Event Planning for Dummies***

Meetings = Money

For the most part, the biggest cost of any meeting is that of the participant's time. Therefore, the first question to ask before scheduling a meeting is whether it's really necessary. "I ask all my meeting organizers to put together a cost-impact analysis for each meeting they're planning," says Joyce Chavez, Clinical Resource Manager at Hoag Memorial Presbyterian Hospital. The number one rule should be "don't waste anyone's time." In other words, "don't meet if you don't have to."

Planning for Success

Preparation is the key to any successful meeting, according to Chavez, which means putting down – in writing – the purpose of your meeting and the outcome you desire. For example: "gaining stakeholder approval for the surgical glove conversion." This enables you to determine your attendees (essential stakeholders only), time/place (in accordance with their availability), the agenda (sequence of discussion), materials to be distributed (before and during) and any lobbying you need to do beforehand.

Continued on back

VA People *Viewpoint*

Meet Joyce Chavez

A native of Southern California, Joyce Chavez has more than 30 years' experience in the region's healthcare facilities. An RN, her degrees include a Bachelor of Science Health Science from Cal State University Fullerton and an MBA from University California Irvine. Her resume includes clinical stints in ER, NICU, Maternal Child Health and Cardiovascular Medicine. She has also served as Acting Director of Cardiovascular Services and Research Programs at Fountain Valley (CA) Regional Hospital. Today she holds the position of Clinical Resource Manager at Hoag Memorial Presbyterian Hospital in Newport Beach. There she designed and manages a value analysis program that has resulted in saving $10-plus million over the past five years. Currently, her primary focus is New Technology Analysis, which assesses physician-driven device requests for evidence-based efficacy, safety and operational/financial impact. A published author, she is an organizing member of the Association of Healthcare Value Analysis Professionals. She is also a member of our editorial board.

Q: What drew you to the healthcare field?
A: I always liked science, but to be honest I wanted to be an artist. Nursing offered much more security, plus flexibility. It seemed to provide so many avenues within the profession: teaching, counseling, patient care, research.

Q: How did you transition to Value Analysis or your current job?
A: My first job in the ER at Beverly Hospital in Montebello was a great experience -- and not at all what I expected. Time and some outstanding role models helped me develop skills and confidence. That's when I started working on my bachelor's degree.

Q: How did you prepare for your current position?
A: I never had a big desire for management but when something needed to be done I was always ready to step up. In one situation, we had to justify everything from patient care to wellness education. Setting up a database of outcomes, we were able to show that you can give good patient care and make good business sense. It was about this time that I decided to pursue my MBA, which taught me about business models. It was a tool I found useful when, as director of Cardiovascular Services, I was responsible for cost analysis and budget management, and later, at Hoag, when Value Analysis was brought in-house.

Q: What part do meetings play in your duties?
A: I must spend 30 percent of my time in meetings, both formal and informal. They're important, but can be time wasters.

Q: What training did you receive in conducting meetings?
A: Through work, I was enrolled in a leadership training program based on Stephen Covey's "Seven Principles." It was a 16-week course and we spent more time on meetings than any other topic.

Q: What meeting skills do you find most useful for the Value Analysis professional?
A: Value Analysis is about relationships. A key element of my job is being able to establish trust so that I can influence a positive outcome. Know your stakeholders; know your goal. Your most crucial meeting skills are preparation and communication.

Q: Can you give an example of how you have used these skills in everyday or difficult situations?
A: Here's one. This was a meeting with colorectal surgeons about a product change. I knew one guy in particular was going to be very vocal in his opposition. So before the meeting, I got the buy-in of a respected surgeon who would be attending. When the lengthy criticism started, my ally smoothly broke in with "Oh come on. You're a good surgeon. The only way this would be difficult is for someone who is not." Opposition diffused.

What's Your View?

Share your view as a Viewpoint Guest!

As a Value Analysis Professional,
your experience and expertise
are welcome additions to our newsletter forum.

If you – or someone you know – would be willing to share your viewpoint on the topic of one of our upcoming newsletters, please contact Editor **Wendy Lemke** at **wendy.lemke@crbard.com**.

We value your viewpoint!

Continued from inside

Agenda Essentials

Part of planning for success requires creating a meaningful agenda. Keeping to one page only, include time/date/place and length, purpose/objective, invited participants along with their roles and what they're expected to bring, agenda items in sequence with presenter(s) and time allotted, and any items participants need to do in advance. Use action verbs like "create, develop, or determine." Circulate well beforehand.

The People Factor

Who to invite is as important as what to discuss. Numbers matter: under 10 is most effective; things get complicated at 20 and with 30 or more you need subgroups and/ or facilitators unless you're doing a presentation or panel discussion. Each person attending must be there for an identified purpose: to provide specific information, expertise, advice or approval. The fewer involved, the greater the chance for success. "If I'm invited to a meeting, I'll often check in advance to see if my attendance is really essential," says Chavez.

Location, Location, Location

As in real estate, location matters. The site, for example: in your office/area, it boosts your authority; in a subordinate's, it can boost morale. Likewise with seating: round tables are good for discussion, rectangles for decision-making. If you want to exert influence over someone, sit directly opposite for optimum eye contact. If you anticipate conflict, seat those with opposing viewpoints across from (rather than next to) each other to avoid private squabbles. Split up factions by interspersing supporters and opponents. If there's no seating plan, let others place themselves; it will tell you a lot about how they view themselves and the issue under discussion. Sitting in the middle may indicate they want to participate. Or dominate.

You're the Chair

It's the duty of the chair to greet attendees, open the meeting, set the ground rules, move through the agenda items in a timely manner, monitor behaviors, achieve and confirm consensus or action items, then sum up the outcomes and close the meeting with follow-up instructions. To do so, the chair must be firm, able to summarize points, be flexible with differing styles of the attendees, open to opinion and give all views equal consideration while still keeping the discussion relevant and maintaining order.

Damage Control

Prevention is always best. Chavez recommends knowing the personalities, their hot buttons, stakes and interests and employing an ally – such as a respected surgeon -- when needed. Watch for negative body language and be quick to stop side debates or private conversations. Don't be afraid to address distracting tactics. For example, if someone keeps presenting conflicting information, recap the facts; if another begins to bluster, isolate by avoiding eye contact and give others a chance to speak. Above all, stay calm, call on your ally, remind everyone of the purpose of the meeting and the need to reach agreement. If necessary, change the atmosphere by allowing a moment of silence followed by a change of subject.

Timing is everything

Remember, time is a precious commodity. Start on time, end on time. Schedule meetings in the morning, preferably before lunch so attendees will be disinclined to tarry. Slate important topics toward the top of the meeting; people are more receptive when they're fresh. Keep it short: 30 minutes is tolerable; restlessness sets in at 60 and 90 is over the top. Schedule breaks if it's going to be a long one. And, finally, close the meeting by thanking everyone for their time and efforts. Good will goes a long way in making meetings work.

Putting It All To Work

"I learned early on that meetings could make or break a project," says Value Analysis Professional Chavez. Here are some insights she has found useful as Clinical Resource Manager at Hoag Memorial Presbyterian Hospital.

1. Know your goals. What is the outcome you want from this particular meeting?
2. Invite the right people. Who are the stakeholders who need to be there in order to achieve your goals?
3. Understand your stakeholders and include them early on.
4. Meet only when necessary. People are busy and meetings cost them and you both time and money. Is there another way to achieve your purpose?
5. Get an ally, a respected member of the group, to back you up. Meet with him/her beforehand to discuss your roles.
6. Set the ground rules at the beginning of the meet ing so everyone knows what to expect.
7. Appoint a wingman, someone to serve as note-taker or time-keeper who can help you keep the meeting on track.
8. Write it down. Not just before, but during the meet ing, write down everything you want to say. It will help you focus your thoughts.
9. Know your role and adapt your tone. Different situations require different styles. Do you need to be assertive or sit back and listen?
10. Be sensitive to the needs of others. There's never a need to be impolite.

"When opening a meeting, I like to use a quote from an unknown author in hopes of avoiding group members' being overly rigid in decision making which can result in 'tunnel' or win/lose decisions," says Chavez. She shares it here:

'We make decisions every day; everything we say and do is the result of a decision, whether we make it consciously or not. But for every choice, big or small, there's no easy formula to making the right decision. The best you can do is to approach it from as many perspectives as possible, then choose a course of action that strikes a balance you can feel satisfied with.'

*These healthcare professionals have been compensated by C. R. Bard, Inc. for their time and effort in contributing to this publication.

This newsletter series is sponsored as a service for the value analysis, contracting, and materials management professionals by C. R. Bard, Inc. Comments or suggestions on newsletter format or topics of interest may be forwarded to Wendy Lemke, wendy.lemke@crbard.com or (908) 277-8491.

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Other sources you might find useful:
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Meeting Excellence by Glenn Parkers and Robert Hoffman