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(A CERTIFICATION
COURSE FOR
PROFESSIONALS)

Meetings

DISCUSSION

How much time do you spend in meetings per week?

How much of that is either productive or effective?



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Meetings

According to an article in MIT's Sloan Management Review, the average U.S. executive spends **23 hours a week** in meetings.

Source: Harvard Business Review



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Meetings

71% of meetings are considered unproductive (Harvard Business Review)

67% of employees say excessive meetings prevent them from doing their job (Microsoft Work Trend Index)

Workers spend an average of **31 hours per month** in unproductive meetings (Atlassian)



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Cost to Business

Unnecessary meetings cost US companies an estimated **\$37 billion per year**. (Lucid Meetings)

A typical mid-level managers time in meetings equates to **\$25k-\$50k in opportunity cost** (MIT Sloan Management Review)



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Cost to Business

67% of senior managers say meetings keep them from doing their work (Harvard Business Review)

64% of employees say meetings come at the expense of deep thinking time (Microsoft)



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“When your organization reaches the size where meetings are necessary in order to work on projects and to create quality communication, you will quickly learn to hate group meetings if you don’t manage them very carefully.”

Dave Ramsey
“EntreLeadership”

DISCUSSION

Do you typically understand the “why” of the meetings you attend?



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Three Types of Meetings

Get the results you seek



Information Exchange



Brainstorming



Decision Making

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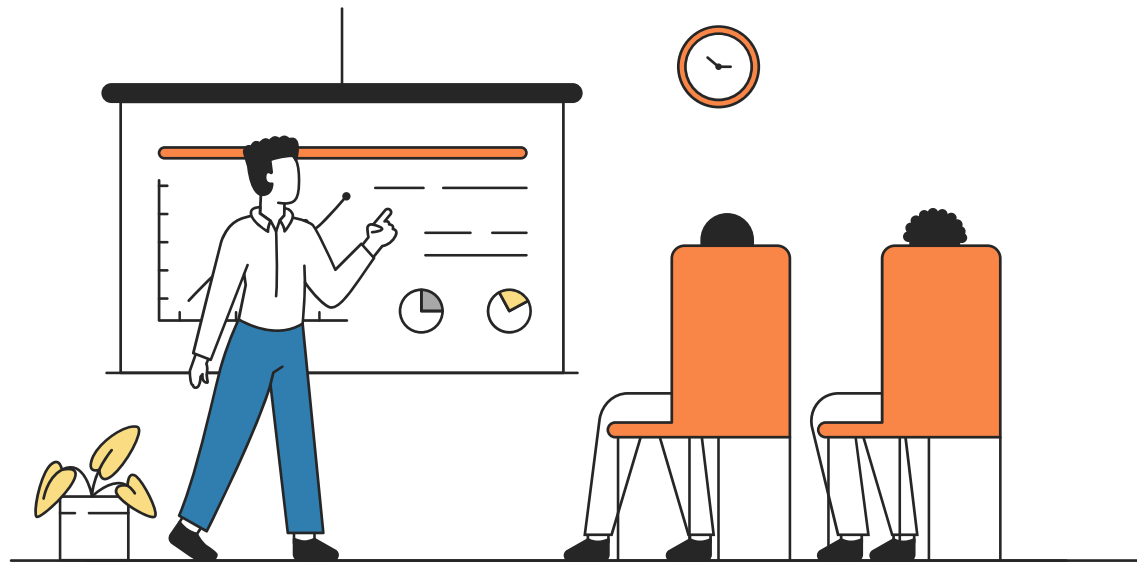
Information Exchange

Status Reports

Progress Updates

Strategy Sync

Usually one person presenting to a group.



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BrainStorming

Ideating

Problem Solving

Innovation efforts

Usually a group effort.



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Nominal Group Technique

Enhances brainstorming with a **VOTING** process at the end.

Ranks the most useful and relevant ideas for further exploration or prioritization.



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Decision Making

Course of Action (COA) Approvals

Project approvals and authorizations

Approvals for change efforts or defect repairs

Success depends on ensuring the decision maker is armed with enough information to make a decision.

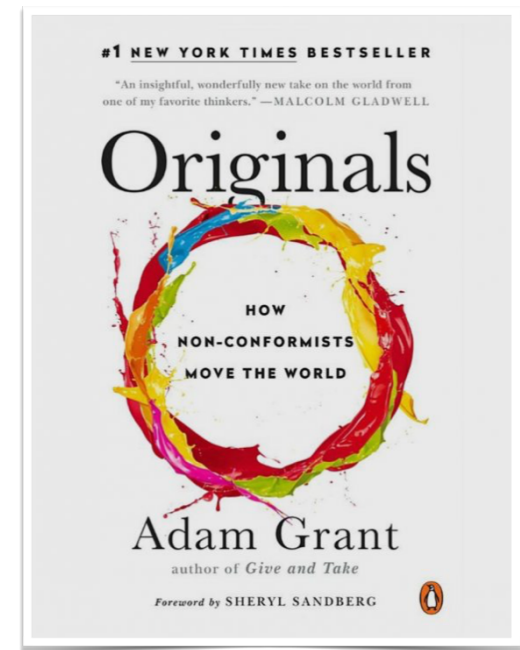


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Reasons To Meet

Wharton PhD Adam Grant Uses 4 Reasons To Meet:

- 1: Meeting to **learn**
- 2: Meeting to **decide**
- 3: Meeting to **do**
- 4: Meeting to **bond**

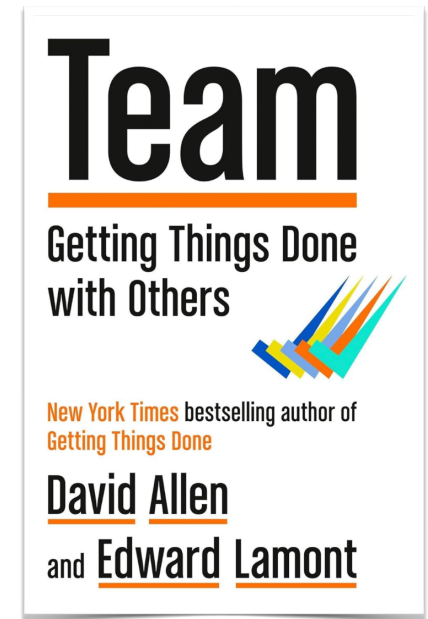


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GTD 5 Reasons For Meetings

David Allen and Edward Lamont:

- 1: **Give** information.
- 2: **Get** information.
- 3: **Develop options**
- 4: Make **decisions**
- 5: **Human** connections.



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Purpose

The “WHY” of the meeting.



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Meeting Agendas

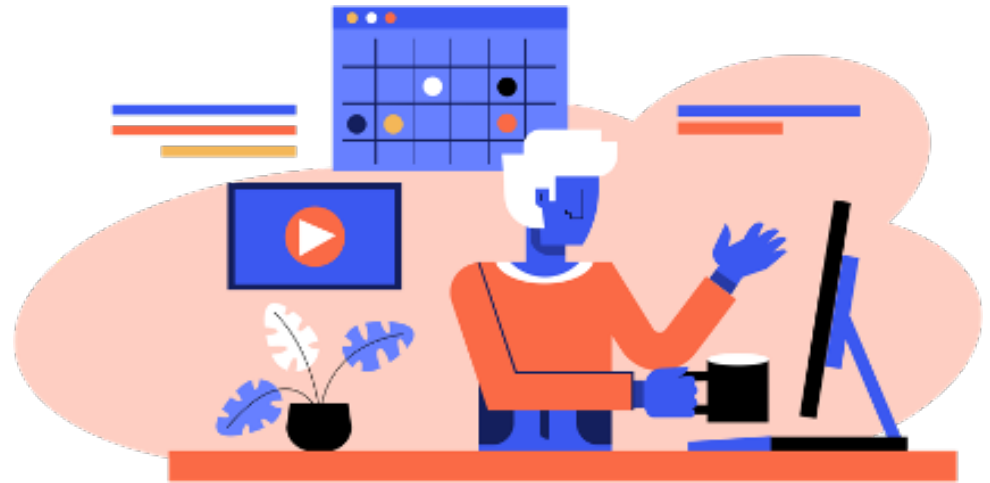
What, who, how long

Outcomes - outputs

Objectives

Appropriate stakeholders

How will we measure success?



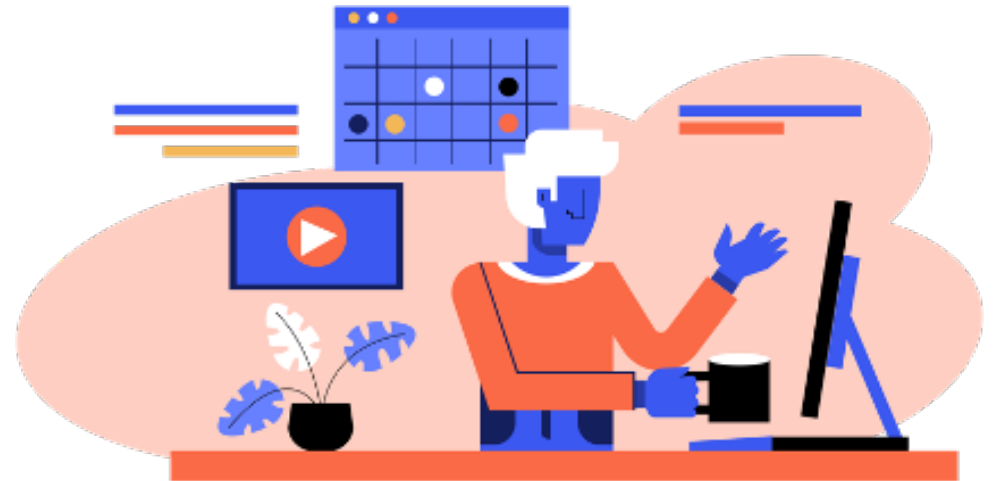
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“Agenda Theater”

Rather than a second-by-second accounting, focus on the meeting's **OUTCOMES**

Focus on what you hope to **ACHIEVE** in the meeting



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Other Considerations

Risks – what could possibly go right & wrong?

Resources – have a **plan**

Location – what makes the most sense?

Scope – what are we **NOT** talking about?

End meeting with **SMART** action items.



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Where we meet

Accessible

Natural light / fresh air

Comfortable facilities

Regular (catered) breaks

Encourage movement



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How we meet

Set ground rules (especially for usage of technology)

Encourage participation

Manage etiquette / conflict

Visibly record meeting

Summarize & share results: **"The Scribe"**



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The Scribe

Captures meeting notes.

Shares the notes with all participants

Helps eliminate the trove of emails cross-pollinating post-meeting

Syncs all communication



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**“Audit to eliminate automatic collaboration.
Ask the right questions about teams and
meetings: What is the purpose? Who really
needs to be involved? Does this team still
make sense?”**

Jake Breeden

“Tipping Sacred Cows”

Informal Meeting: Scrum

What did I do **yesterday** (or since we last met)?

What will I do **today** (or until we next meet)?

What is in my way (**issues/ blockers/ risks**)



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The DOL Scrum Approach



Past

What has transpired since the last sync?



Future

What do they hope to accomplish before the next sync?



Blockers

ANYTHING that will prevent them from achieving their FUTURE goals.



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The DOL Scrum Approach



Blockers

ANYTHING that will prevent them from achieving their FUTURE goals.



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Formal Meeting

Agenda

Welcome

Attendance / apologies

Minutes of the previous meeting

Business of the meeting

Agenda item 1

Agenda item 2

Agenda item 3

Other business

Due outs/ action items

Next meeting time & date



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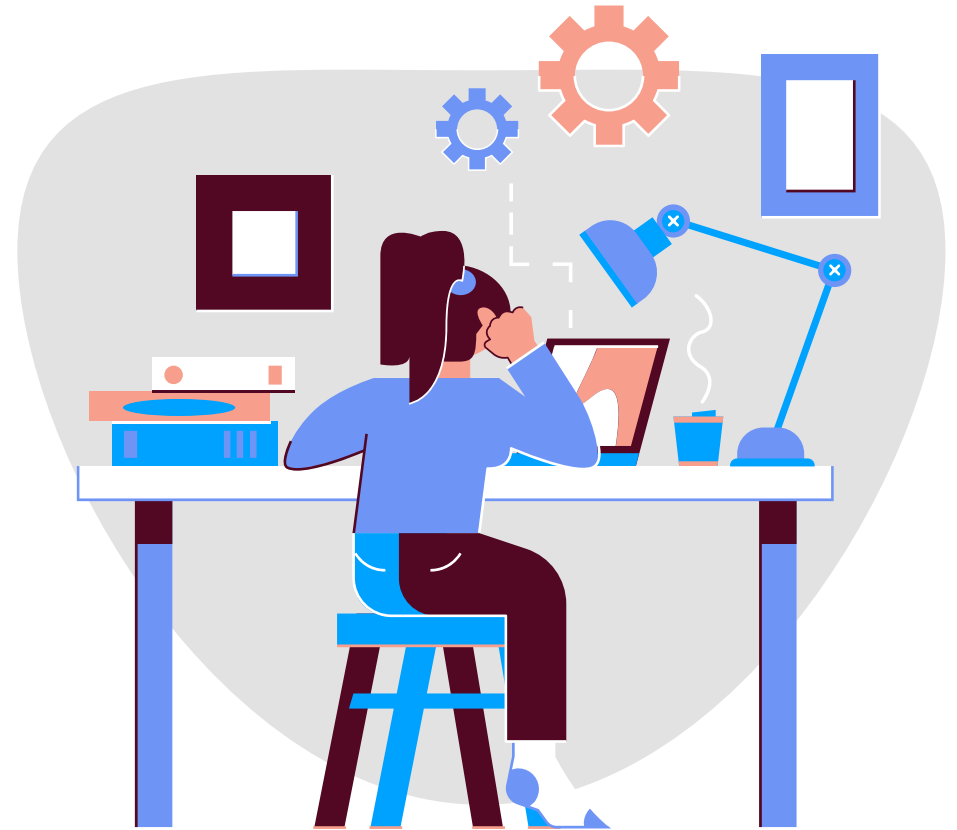
VIRTUAL MEETING SUCCESS

Be Specific As To the **WHY**

Ensure the meeting is **necessary** and stay on time.

Omit Unnecessary Participants

Remote work isn't going away.



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Active Facilitation

The practice of intentionally guiding group discussions or working sessions to ensure clear outcomes, inclusive participation, and productive decision-making.

Unlike passive moderation, active facilitation is a leadership skill—it requires presence, structure, and the ability to steer a group toward a goal without dominating the content.



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Active Facilitation

The facilitator owns the **process**, not the **solution**.



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Active Facilitation

IT IS	IT IS NOT
Leading the HOW of the conversation	Dictating the what of the outcome
Creating space for every voice	Letting dominant voices control the room
Redirecting when discussions drift	Letting the agenda die on “slide 3”
Managing time, tone, and flow	Just “sitting” and letting others talk
Asking better questions, not giving answers	Acting like the expert



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Active Facilitation: Core Goals

- 1: Clarity:** All understand the objective, process and decision points
- 2: Engagement:** Involve all voices, especially quiet or marginalized ones
- 3: Progress:** Keep momentum by managing time, scope, and outcomes
- 4: Neutrality:** Stay impartial, especially in conflict or divergent opinions.



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Active Facilitation: Key Tools

Ground Rules: Set expectations for behavior and participation

Framing Questions: Ask open-ended and purposeful questions

Paraphrasing: Clarify and reflect back to build understanding

Timeboxing: Keep segments disciplined and moving



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Active Facilitation: Key Tools

Stacking: Track who wants to speak and manage airtime

Parking Lot: Defer off-topic ideas without losing them

Check Ins/Outs: Surface energy and concerns early and late

Breakout Groups: Use smaller teams for deep dives and enhanced engagement



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Active Listening

The skill of **fully** and **intentionally** focusing on what another person is saying—not just hearing their words, but also understanding their **meaning**, recognizing their **emotions**, and **responding** in a way that shows you're **genuinely engaged**.



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Active Listening

It's listening to **understand**, not listening to **reply**.



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Why Active Listening Matters

Builds trust and strengthens relationships

Reduces misunderstandings and assumptions

Improves problem-solving and collaboration

Defuses tension and shows respect, even in disagreement

Encourages others to share more openly, which leads to better decisions



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Key Elements of Active Listening

- 1: Pay Full Attention:** eliminate distractions, use eye contact and open body language, stay mentally present.
- 2: Show you are listening:** nod occasionally, use short verbal cues (I see, Go on...), don't interrupt
- 3: Reflect and paraphrase:** repeat the essence of the points to them, ask clarifying questions
- 4: Respond with empathy and intent:** acknowledge feelings, don't dismiss or correct
- 5: Listen for what isn't said:** pay attention, note inconsistencies



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“Any day is a good day to make a STOP-DOING LIST. Is there a regular meeting you can excuse yourself from? A committee you can drop out of? Are there any things you do out of a sense of fear or guilt? If so, take the bold risk to stop doing them today.”

**Jake Breeding
“Tipping Sacred Cows”**



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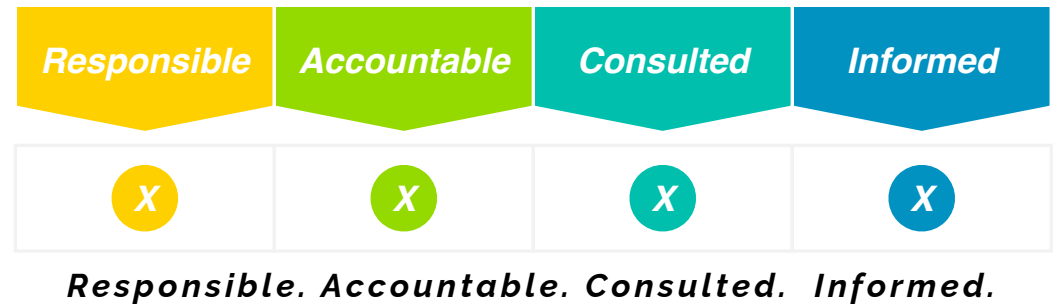
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RACI and CAIRO

RACI & CAIRO

Clearly delineating roles within your project environments will

- 1: Allow for greater **clarity of effort**
- 2: Help with **Effective** Stakeholder Engagement (ESHE)
- 3: Enhance **cohesion** amongst the team



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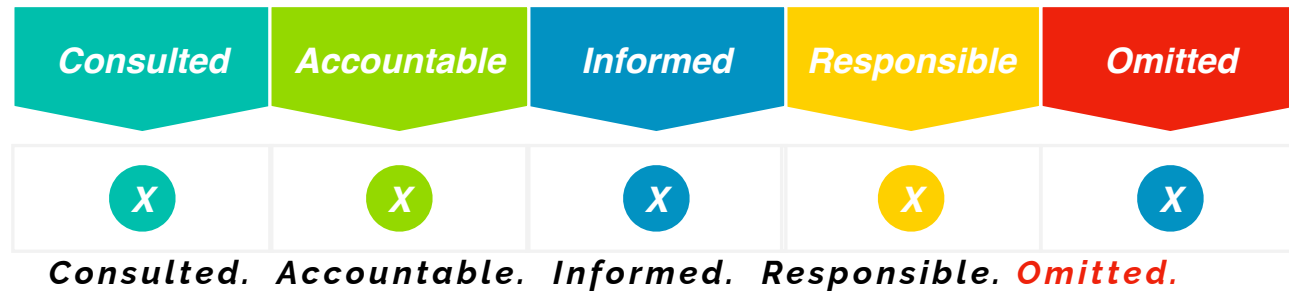
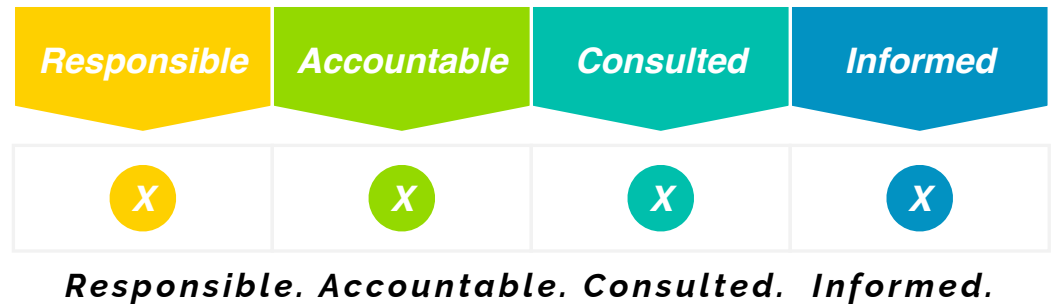
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RACI DEFINITIONS

Responsible



The person who carries out the task or process. **Gets the job done.**

Accountable



Person ultimately accountable for the **task or process being completed.**

Consulted



People not directly involved in the task or process, but are consulted.
Typically a SME

Informed



People who **receive output** from the task or process or **stakeholders who need to be informed.**



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CAIRO DEFINITIONS

OMITTED

LEFT OFF THE PROJECT INTENTIONALLY TO **PRESERVE PRIORITIES**



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Roles and Responsibilities Analysis

Business Processes	Functional Roles								
	R		A		C		I	C	
	A	R		R	C	C	I		I
<i>Decisions / Functions / Activities</i>	C		R		C	C		R	A
	C		A			R		R	
	I	C		R	A		C		R
		I		C	R	A			C

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FUNCTIONS	PROJECT OWNER	BUSINESS ANALYST	PROJECT MANAGER	SOFTWARE ENGINEER	DEVELOPER	FUNCTIONAL LEAD	EXECUTIVE SPONSOR
PROJECT PLANNING	A	I	R	I	C	C	I
PROJECT INITIATION	A	I	R	I	I	I	C
BUSINESS REQUIREMENTS	I	R	I	I	C	I	A
SOLUTION DESIGN	I	C	I	R	I	A	I
ALPHA TESTING	I	C	I	R	A	I	C
BETA TESTING	C	C	A	R	I	C	I
SOLUTION DELIVERY	R	C	C	C	I	I	C

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PROJECT DELIVERABLE	Executive Sponsor	Project Sponsor	Steering Committee	Advisory Committee	Role 05	Project Manager	Tech Lead	Functional Lead	SME	Role 05	Developer	Admin Support	Business Analyst	Role 04	Role 05	Consultant	PMO	Role 03	Role 04	Role 05
	PROJECT LEADERSHIP					PROJECT TEAM MEMBERS					PROJECT SUB-TEAMS					EXTERNAL RESOURCES				
Initiate Phase																				
1. Task 01	A/C	R / A				R / A	A / C		C											
2. Task 02						R											A			
3. Task 03	I					R / A	A / C	A / C	C				C			C				
4. Task 04	I	A / C	I	I		R / A	C	C	C				C			C	C			
Plan Phase																				
1. Task 01	C	C				R / A	C	C	C				C			C				
2. Task 02	I	I	I	I		R / A	C	C	C	C	C	C	C			C	I			
3. Task 03	I	I	I			R / A				I	I	I	I			C	I			
Execute Phase																				
1. Task 01	C/I	C / I	C / I	C / I			R / A	R / A	R / A	R / A	R / A					A / C				
2. Task 02	I	I	I	I		R /	R /	R /	R /							C	I			



Take-aways from Meetings



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Be **deliberate** when setting up a meeting.

Know how much time you are potentially **wasting** in unnecessary meetings.

Set the **culture** for the success you crave.