

## How To Reduce Meetings? A Simple Framework (with Example)



### Most issues - for which we need to have meetings – have a series of steps.

- Step 1: Gathering Information (by the Originator)
- Step 2: Analysis (by the Originator)
- Step 3: Sharing of Information / Analysis (with others, by Email)
- Step 4: Analysis (by the Receivers)
- Step 5: Discussion (to decide the course of Action)

Before you go to the 5th stage i.e. Discussion (Meeting), ensure the previous 4 steps have been completed.

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### An Example

Imagine, you are a Branch Manager of a bank.

You are informed by the Head-Office, that an Audit is scheduled of your Branch in the coming month.

### What you will do (typically)

You will call a meeting of all Asst. Managers and Team Leaders in your branch, to inform about the Audit and preparation for the same.

### What you should instead do

You should FIRST send an email to all that has some - information / analysis / to-dos – like under:

#### Dear Team,

Please find attached an email from the Head Office advising us of the Audit of our branch, starting on \_\_ date.

FYI,

1. The Audit will cover transactions for the 6 months (1 July – 31 December). It will be done by a 2-person team, over a week.
2. The Audit will cover: Account Opening, Cheque Clearing, Deposits, Pay Orders, and Lockers.
3. Last time, we got a 'Satisfactory Rating.' We need to maintain or better that.
4. Some initial concerns / to-dos:
  - Previous 3 Audit Observations: Please go through and confirm that it is done by \_ date.
  - Account Opening: They have sent a list of 50 Accounts, as attached. Keep those ready by \_ date.
  - ID Access: Take a dump of your System ID's. For staff who have left, their ID needs to be disabled by \_ date.
  - RBI Reporting: The same needs to be up-to-date. Please confirm by \_\_.
  - Key Documents: Locker Register, Cheque, DD, & Pay Order Stationery are all to be secured well, by \_ date

We will have a meeting on \_\_ to discuss the above and other concerns.

Please come prepared with the above and other concerns you may have.

**Regards...**

**Manager**

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### How does the Email help?

1. Typically, in any meeting, the first 30-odd minutes are spent sharing information, bringing all to a basic understanding of the issue.
2. Even after that, the contribution of participants is surface-level because few come prepared thinking the issue through.

Emails like the above ensure all come prepared and that the meeting can start from higher ground.

True, drafting emails like these will take some time, possibly 30 minutes. But once it gets sent, you can be sure the issue will move speedily and concretely.

I call these emails as creating a rallying point on an issue. Some would call them 'Facts first, discussion afterward.'

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### **Who should send such a 1-Page email before the Meeting?**

1. In almost any issue, someone would have thought long and hard about the issue. Or will have access to crucial information. Or
2. The Senior-most person chairing the meeting (or con call), can ask someone to send a 1-page listing of the issue / to-dos / tentative concerns, to all the participants before the meeting.

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### **Recently, I was helping a 10-member group on a project.**

I used the above approach to drive forth the work and coordination.

At the end of the project, I received a compliment from 2 of the participants, "You achieved in 2 weekly, hour-long meetings, what we had not achieved in 2 months."

### **Conclusion**

The high number of Meetings & Conference Calls are a cost, in terms of both energy and financial cost.

A Shopify 'meeting calculator' estimates that a 3-person, 1-hour meeting can cost upward of Usd.700, including office rental to an organisation.

The above 5-step framework will help you to reduce the number of meetings. You will achieve more in 1 meeting what would usually take 2 – 3 meetings.

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Anil Karamchandani is a Mumbai-based former manager.

Anil is the author of the book '28 Management Tips: There Is a Better Way to Do Everyday Work Situations.' Visit [www.anilkaramchandani.com](http://www.anilkaramchandani.com) to learn more.