

Urgency-Driven Stand-Up Meetings

*“Meetings are indispensable when
you don’t want to do anything.”
—John Kenneth Galbraith*

Do meetings create value? In other words, is all that time you spend bouncing from staff meeting to coordination meeting to customer meeting to status meeting really necessary? Absolutely not. In fact, according to a recent survey by researchers at 3M, the average executive spends one-and-a-half days per week in meetings, and judges no more than half that time to be productive.¹ The rest of the time is squandered waiting for people to show up, waiting for your topic of interest, waiting for the endless tangential discussions to die down, etc. And this assumes that there is a legitimate reason for the meeting in the first place.

Scott Adams, the author of *The Dilbert Principle*, received an e-mail from one of his readers that went something like this: “A guy at my work actually came into a meeting that had nothing to do with his department. When asked what he was doing there he said that he just didn’t feel like he was ‘working’ unless he was in a meeting, and this was the only one going on in the building that day.”² In some industries, this “meeting culture” is so pervasive that the only times available for real work are nights and weekends. Unfortunately, we can’t eliminate meetings entirely (as much as this may seem tempting); group communication is

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central to the successful execution of any project. On the other hand, are we *really* communicating in all those poorly run meetings?

The countermeasures described in this section attack this monumental cause of frustration and wasted time for project teams. Basically there are only two legitimate reasons for gathering people around a conference table: either to *coordinate* or to *collaborate*. Coordination is the process of connecting together the actions of a group so that they remain focused on a specific goal. In the case of a project team, coordination generally consists of determining what tasks people will be starting or completing in the near future, and what information or materials they will need from others to execute those activities. Technical issues should not be discussed in coordination meetings; their sole purpose is to facilitate execution of the project plan.

Collaboration meetings are very different animals. In collaborative meetings, knowledge is shared, trade-offs are made, decisions are arbitrated, and technical problems are solved. Collaboration requires in-depth discussion, whereas coordination demands only a top-level overview. Collaboration may only involve a few specific individuals, whereas coordination is most effective when all interested parties are involved. Collaboration meetings should be event-driven (meaning that they should be scheduled based on the occurrence of a specific problem or need), whereas coordination meetings should be urgency-driven (implying that their frequency should reflect the pressures of the project schedule). In short, coordination and collaboration meetings are different, *and therefore should be handled as separate project activities*.

Our first salvo in the battle to eliminate wasteful meetings has been fired. We are going to abandon the ossified institutions of “weekly project coordination meetings” and “regular technical meetings.” Instead, we will treat meetings as the project tasks they are; scheduled based on urgency or need, focused on creating valuable deliverables, and executed in a lean and efficient way. No longer will meetings be the plague of your daily planner. Well . . . at least we can make them slightly more pleasant than a root canal.

Countermeasure 3.1 – Stand-Up Coordination Meetings

Coordination meetings represent the “drum beat” of a project. A rapid, driving beat will impart energy and urgency onto a team,³ whereas a leisurely (read here “weekly”) beat signals that things can wait for a few days here and there. Yet the weekly coordination meeting is an institution in most firms, making it the most common form of time batch in project management. If you don’t believe that a time batch of just one week can be wasteful, consider Figure M3.1. When is the work that is reported in a coordination meeting actually performed? Typically the

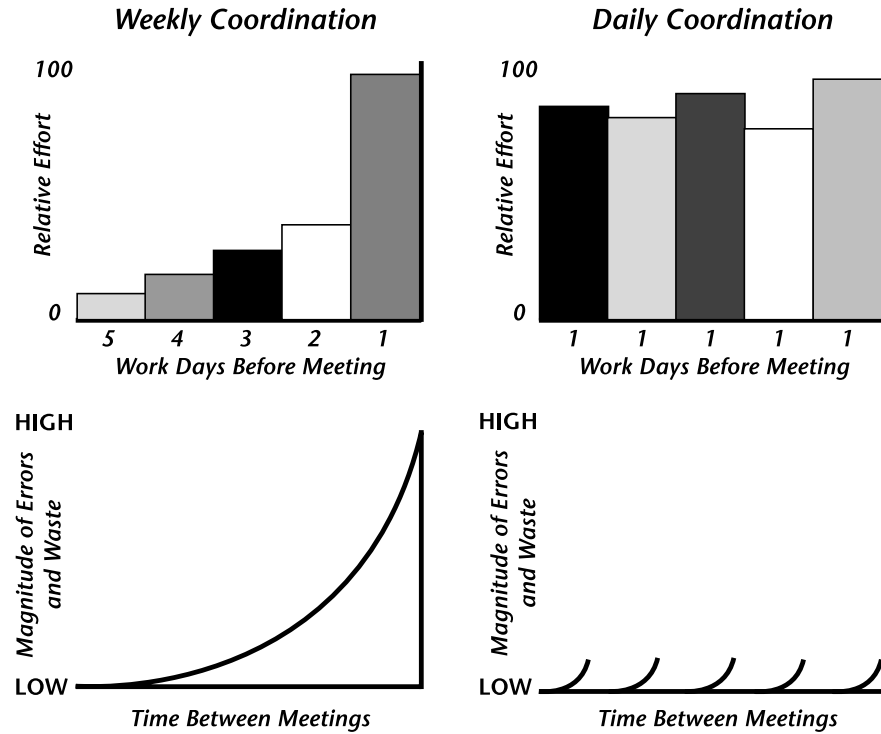


Figure M3.1: When is most of the work that is reported in a “weekly team meeting” actually performed? With frequent coordination, work is apportioned more evenly throughout the week, and a focus on creating real value can more easily be maintained. The lower portion of the figure demonstrates another key benefit of frequent coordination; a reduction in the impact of errors or changes on team efficiency.⁴

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day before the meeting – or perhaps even ten minutes before. People skew their entire workweek based on when they must report progress . . . implying that the rest of their time is focused elsewhere, or perhaps not focused at all. Furthermore, if a mistake, error, or change occurs in the interim between meetings, there is a strong tendency for team members to hold that information until the next weekly forum. During that holding period, however, a lot of work is being performed by other team members. Much of that work might prove to be fruitless if the reported error affects their work.

The combination is insidious: A tendency to perform work in leisurely, weekly batches, combined with delays in reporting critical errors and changes. The best way to recognize this is to imagine that you are driving a car with an unusual steering problem. The steering wheel has a one-minute delay; turn the wheel, and a minute goes by before the car reacts. This dangerous delay allows you only two choices. Either you can drive very slowly to avoid having an airbag moment, or you can gun the engine and pray that things will work out. It would be so much easier, safer, and more efficient if the car's steering responded immediately to your needs. Is this not also true when “steering” the actions of your project team?

Frequent, even daily coordination of a project team can yield a multitude of benefits at essentially no cost. The trick is to jettison the old idea of an hour-plus formal meeting in favor of quick, intense stand-up meetings. I have seen this technique yield startling results in dozens of firms spanning virtually every industry. In fact, of all of the countermeasures presented in this book, I recommend that you try this one first. You will not be disappointed.

Here's how stand-up coordination meetings can be deployed on your project. First pick a point in your schedule that requires high levels of coordination (e.g., preparation for a design review, initial prototype testing, key customer delivery, etc.). It is important to remember that the benefits of frequent coordination are only realized if your project is entering a period of intense activity. Urgency should be the driver for the frequency of meetings.

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During early planning and concept development stages, for example, a weekly or twice-weekly format might be more than adequate. As the intensity of interactivity increases, however, daily coordination becomes a mandate.

Use the pressure of an important upcoming milestone as an excuse for introducing a daily stand-up meeting with the entire team. The meeting should take place at a time that is convenient for the majority, but I suggest either at starting time (i.e., 8:00 a.m. sharp) or just before lunch (i.e., 11:45 a.m.). The location should also be convenient for the majority, and have sufficient space to accommodate all the members of your team. Finally, *the duration of your stand-up coordination meeting should be no more than ten minutes*, or alternatively, no more than one minute per attendee.

This last mandate is the key to making this countermeasure work. If these stand-up meetings are as wearisome as the weekly ones, we will be far worse off. Instead, the meetings should consist of a brief visit with each person to answer three simple questions:

- What value did they create yesterday?
- What are their plans for today?
- What do they need from the rest of the team (or others) to accomplish their value-creating objectives?

The point is not to engage in lengthy discussions, nor to micro-manage. Only essential coordination information is shared. Any technical or other important issues should be captured in a “parking lot” (usually a white board or flip-chart easel) for future collaborative meetings. Literally, the facilitator (who could be any member of the team, not just the team leader) should demand that the team members, “present only things we don’t already know.” If team members are spread out geographically, a dial-in teleconference can be used (don’t waste time and expense on video conferencing for a simple coordination meeting). Team members in other time zones can be contacted separately by the team leader and their inputs and needs shared with the main meeting each day.

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Beyond the obvious benefit of imparting a sense of urgency to team communication, frequent stand-up meetings offer at least six additional benefits, as shown in Figure M3.2. These efficient meetings provide an invaluable opportunity for your project team to develop a shared language. Each discipline has a chance to hear what all other disciplines are doing, with a focus on the linkages and needs of each function. Moreover, if a language barrier is detected it can be rapidly rectified.

- **Creates a shared language among team members**
 - **Allows for real-time reallocation of resources**
 - **Enables a focus on value-creating activities**
 - **Establishes a clear work plan for each day**
 - **Provides a mechanism for cultural change**
 - **Builds team identity and emotional commitment**

Figure M3.2: Six critical benefits of using frequent stand-up coordination meetings during periods of intense activity on your project.

The second powerful benefit is the ability to reallocate your resources almost instantly. This enables immediate adaptation to change, helps the team to absorb shocks, and provides a great way to handle fire fighting and sustaining engineering emergencies. The third benefit of urgency-driven stand-up meetings is that they provide a mechanism for focusing the team on value-creating work. It is easy for lots of waste to creep into a week's worth of project work. It's much harder for waste to accumulate if priorities and progress are reported daily. A designer that just can't let go of a drawing will experience continuous peer pressure to wrap it up. Those fire fighting requests from senior management can be addressed quickly, smoothly, and non-invasively. Finally, any missing information or lack of cooperation will be put in the spotlight every morning, ripe for resolution by the team.

The fourth benefit of frequent informal coordination is that each team member leaves the meeting with a clear work plan for

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the day. Working on the right things, at the right times, with all the information needed to proceed, is the essence of efficient project work. Frequent coordination forces team members to carve their tasks into smaller work packages, and report steady progress rather than batched milestones.⁵ The improvement in team productivity due to just this single factor is amazing. Knowing what to work on and being allowed to do that work . . . what a concept!⁶

The final two benefits support the “soft side” of team productivity. Daily stand-up meetings have become a central part of the work culture in many firms. These ten-minute quickies provide employees with frequent opportunities to see their boss, hear critical issues, close the loop with co-workers, take pride in their successes, and receive balm for their failures. The entire workday in some companies revolves around what happens in these meetings. Workers feel increased commitment to their teammates, since they are frequently reminded of the importance and interdependence of their work. They become emotionally committed to making their project a smashing success. After all, productivity starts with the commitment of the team, and daily meetings provide a fertile ground for gaining this emotional buy-in.

A few examples of daily coordination in action are warranted before I close this discussion. Most of you probably recall the opening to the old TV show, *Hill Street Blues*. The precinct sergeant would call roll and go through assignments, announcements, and major new crimes. This quick roll-call meeting represented a daily “stand-up meeting” for the officers; a vital necessity when conditions in a precinct can change overnight.

In manufacturing companies, daily coordination is often a morning ritual on the factory floor. A brief stand-up meeting before each shift change allows for last minute modifications to the production mix, along with disposition of repairs, maintenance, improvements, and assignment of other responsibilities. Finally, in the software industry many firms are following Microsoft’s lead by using “daily build and synchronize” events

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to ensure that parallel code development is always well coordinated.^{7,8} These daily build meetings are not an option; they have become a mandatory work rule at many software companies.⁹

Countermeasure 3.2 – Three-Tier Project Planning

We can easily extend this concept of daily project coordination to encompass our entire approach to schedule and task management. All we need is a simple action-tracking sheet, like the one shown near the bottom of Figure M3.3. This action list is not intended to track the day-to-day minutia; it is a listing of the critical deliverables and milestones that a project team faces over the next two-week period. At the beginning of each week, the team leader updates the action list to include another week of schedule milestones, thereby providing a two-week “rolling window” of visibility for the team. During daily stand-up meetings, this action list can be used as a touchstone for progress on critical items. As milestones are achieved, they are removed from the list. If an important new event is identified, it can be added to the list for future tracking.

The beauty of this approach to progress monitoring is that you will need no other mechanism to manage your entire project schedule (and earned-value plan, for that matter, if one exists). The daily meetings and action-tracking sheet represent Tier 3 of a three-tier approach to lean schedule management. When milestones are reported as completed or delayed, this information can be folded upward into a three-month detailed project plan (Tier 2). As each month passes, the detailed schedule is expanded to include another month, always providing a three-month rolling window of in-depth planning.

The reason for performing detailed scheduling of tasks only a few months into the future should be obvious. On most projects, things will change so much in three months that any detailed planning beyond that point would be so much nonsense. Instead, simply maintain a Tier 1 “work package” plan that identifies key customer milestones and major tasks. Note

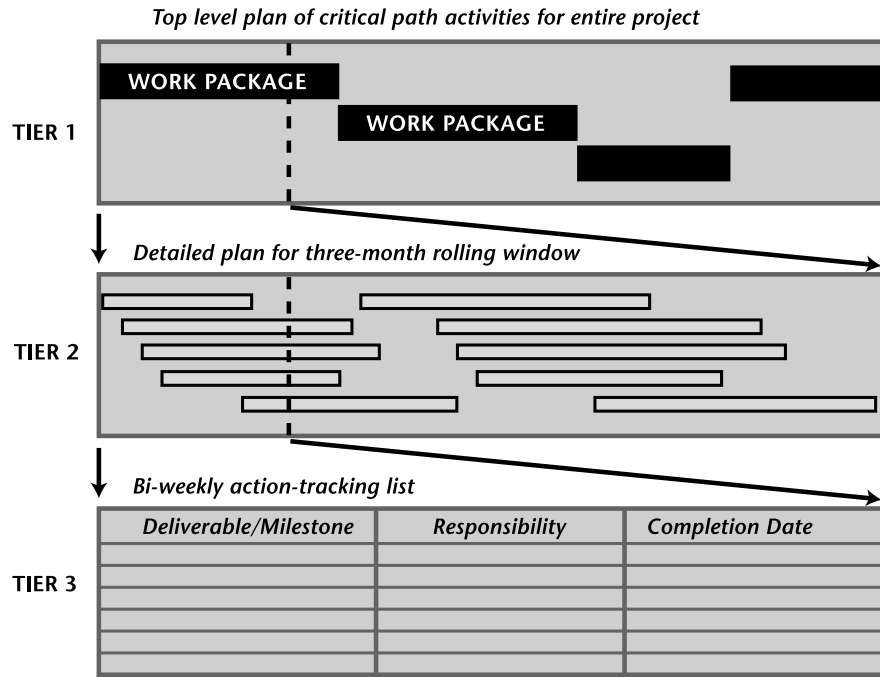


Figure M3.3: A three-tier approach to maintaining a project schedule. The first tier is an overview schedule that consists of just milestones and large work packages. The second tier expands the first into a detailed three-month rolling-window schedule. The third tier is simply an action-tracking sheet that is maintained and updated in your team’s stand-up coordination meetings.

that you should select a length of rolling window for Tiers 2 and 3 that makes sense for your project. Quick turn projects might use only a one-week window for daily meetings and a one-month window for detailed planning. A reasonably stable, long-term construction job, on the other hand, might use a one-month window for stand-ups and a six-month window for Tier 3. However you adapt this countermeasure, it is sure to reduce planning and statusing time, while providing a solid connection between the master schedule for your project and what your team is actually doing each day.

Countermeasure 3.3 – Lean Collaboration Meetings

Now that we have an effective method for handling project coordination, we must deal with meetings in which collaboration takes place. The approach that I propose for collaborative meetings has proven to be effective in many firms. It does, however, require a bit of culture change to be broadly accepted. Collaboration, just like any other funded project activity, must be deliverables-driven. A meeting is non-value-added unless some tangible deliverable (e.g., a decision, outcome, trade-off, action list, etc.) is generated that impacts the end results of the project.

In this countermeasure, I suggest a set of rules for collaborative meetings that can dramatically increase their value, as shown in Figure M3.4. These rules are rooted in common sense, but may clash at first with your firm's work environment. In many firms, there is an air of complacency about meetings that may make it hard to convince people that real discipline is needed. Fundamentally, people need to view meetings as *exceptions* rather than the rule. Regularly scheduled meetings with lots of invitees and an endless agenda are part of an outdated, operations-driven culture. Intense, ad hoc gatherings that are scheduled when the need arises are fundamental to a project-driven enterprise.¹⁰ We should always keep in mind that meetings take people away from performing *real* work.

The first recommended rule for executing a lean collaborative meeting is to restrict its duration to no more than one hour (with the possible exception of design reviews or customer meetings). In one firm that I work with, administrators actually kick people out of conference rooms after their hour is up and lock the doors. I have found after twenty-something years of managing projects that there are very few issues that cannot be addressed in an hour. Without a time limit, meetings will grow to consume the space allowed and will often fail to generate a useful outcome.

To make a one hour time limit possible, I suggest a second rule: Address only a single topic (or a few closely related topics) in each meeting. I believe that multi-topic agendas covering widely ranging subjects are a breeding ground for waste. By focusing on a single topic, you will be able to select the right

Rule #1. Restrict meeting to no more than one hour.

Rule #2. Have only a *single*, or several closely related, agenda items.

Rule #3. Only invite those people who have a need to be there
ON TIME . . . all others are NOT WELCOME.

Rule #4. Provide pre-work in advance.

Rule #5. Do not begin until everyone in the room agrees on the
“deliverables” for the meeting.

Rule #6. Any tangential issues or comments are recorded in a
“parking lot” for future discussion.

Figure M3.4: A few simple rules to follow when facilitating collaborative meetings. When used in concert, these rules will eliminate a great deal of wasted time.

people (and only the right people) to attend. Moreover, the entire meeting can be directed toward a clear goal, thereby reducing the number of tangential discussions. Finally, you can eliminate that most wasteful of all individuals; the meeting sitter. Rule three states that only people with value to contribute should attend a meeting. These individuals should show the courtesy of being on time, and should be admonished if they are late. Most important; meeting sitters are not welcome. Non-essential individuals can slow a meeting down, and can potentially add unnecessary cost to your project. Uninvited attendees should be asked to leave. After all, from a management perspective, an employee sitting in an inappropriate meeting is no different than that person taking a nap in their car for an hour.

Pre-work should be provided for meetings that will refer to a documented body of information. This can be attached to the e-mail notification for the meeting, or can take the form of a few hyperlinks or file names of documents to be reviewed prior to the meeting. Peer pressure should be brought to bear on any team member who fails to prepare properly. No meeting time

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should be spent on catching individuals up or reviewing known material.

The most important rule by far is rule five. *Every collaborative meeting must begin with a definition of what the outcome should be.* What tangible deliverable are we creating here? What form should it take? Who will document it? Who is the customer for it? How will it affect our project's success? This is not as time-consuming as it sounds. Just a one or two sentence informal statement is enough. For example:

- We are here to review technical data and decide on which option to move forward with. The deliverable is a brief statement documenting our decision, which will be provided to management and our contract customer.
- We are here to look over recent test data and decide on what actions need to be taken. The deliverable is a prioritized list of recommended actions, with names and dates assigned, which will be provided to the project manager.
- The purpose of our meeting is to assess the risk of changing suppliers for some critical materials. The deliverable is a brief risk assessment and recommendation statement, which will be provided to our procurement representative for the project.

The reason why the fifth rule is so important is that once such a statement is in place (naturally, you should only spend a couple of minutes on this), the remainder of your meeting can be laser-focused on creating that deliverable. Any tangential issues, important or otherwise, should be captured in a “parking lot” and addressed in subsequent meetings. Hence, the final rule enforces a strict “no sidetrack” mandate for the group. Make the required deliverable happen and get back to work; that should be the anthem of every project meeting.

Step-by-Step Implementation

The good news is that implementation is easy; the hard part will be getting your team and your management to accept the change. Frequent stand-up meetings will take a little getting used to, but ultimately your team will love them. Lean collaborative meetings are harder to institutionalize, since organizations tend to backslide into less disciplined behaviors over time. Don't fret if you can't gain overnight acceptance. Even a few modest improvements to your firm's meeting culture can relieve schedule pressures and improve team morale and responsiveness.

What You Will Need

For Countermeasures 3.1 and 3.2 you will need an action tracking list similar to the one shown at the bottom of Figure M3.3. You will also need to select an upcoming event or milestone that is sufficiently scary that your team will accept the need for daily coordination. Naturally, if you run your project like a dictatorship (not necessarily a bad thing), a motivating event will not be needed.

For Countermeasure 3.3, you could really benefit from some buy-in by executive management. A "policy statement" by a business-unit executive wouldn't hurt the credibility of your initiative. You will also need to perform some informal training. An in-firm video that shows an example of a lean collaboration meeting can be very effective.

Who You Will Need

Who indeed? For lean coordination meetings you would like to have all interested parties present, either in person or by phone. If this is not possible, consider using several smaller groups that meet daily and exchange information every few days. In general, you shouldn't try to coordinate groups over about fifteen people. If your project team is larger than this number, divide the team into logical chunks and have subordinates run separate daily coordination meetings. You can then

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meet with the subordinates and cross-pollinate information.

For lean collaborative meetings, you should select invitees that can measurably contribute to creating the desired deliverable for that meeting. More important, you should be sure to invite a “critical mass” of individuals that are capable of reaching a valid conclusion. One problem with holding meetings on an as-needed basis is that people’s schedules may not sync up. To avoid holding meetings with less than a quorum, try asking all team members to block out several common “meeting slots” in their weekly schedule. These slots can be reserved for meetings until the beginning of each week and then released if not needed.

The following steps apply to running a stand-up coordination meeting with your project team:

Step 1 – All attendees are present at the designated place and time. By the way, people can sit down at a stand-up meeting, provided that they don’t get too comfortable. (Keep the doughnuts and newspapers out of reach).

Step 2 – The meeting is called to order. The meeting facilitator makes some brief announcements that are of general interest (one minute).

Step 3 – The facilitator issues an action list for the week (assuming that this is a Monday meeting).

Step 4 – The facilitator asks each team member, in turn, to report his or her status. This means that each person answers three questions: 1) What work did they complete yesterday? 2) What will they work on today? 3) What information, help, or materials do they need to proceed? Each person should also report the status of any near-term action items that they are responsible for (one minute per person).

Step 5 – Other issues or topics are captured on a parking-lot board. After all coordination is complete, these items

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are quickly dispositioned. Those not interested in these issues can leave the meeting (two minutes). Note that if there is little or no new information being communicated in your stand-up meetings, you should ask the team whether the frequency should be reduced. Let the team own the meeting, but be sure that you increase the frequency again as the next critical milestone approaches.

How to Measure Success

There are certainly ways to measure the time savings that can be gained from these countermeasures. I wouldn't bother if I were you. Remember my previous quote by Henry Ford. When he was asked by his financial executive to justify a huge new investment in production improvements, his response was, "The benefits are so obvious that it isn't worth the cost to quantify them." Try these countermeasures out for a month or two and you will be convinced of their effectiveness. If you still have a burning need to quantify something, you can use the time you save in meetings to measure more interesting stuff.

Method #3 at a Glance

Urgency-Driven Stand-Up Meetings

Overview – Meetings can be an enormous drain on project productivity. This method provides simple techniques and rules that enable highly efficient coordination meetings and effective and brief collaborative meetings.

Waste-Slashing Benefits

- 1) Reduction in wasted time due to poorly run meetings.
- 2) Improved project coordination and communication.
- 3) Acceleration of project work rate.
- 4) Ability to reallocate resources rapidly and precisely.

When to Apply – Every project meeting (including customer meetings) should follow the simple guidelines described here. The highest value application is during periods of intense collaborative work that require frequent and effective communication.

Who Can Use It – Anyone responsible for leading a project status review, coordination meeting, or other team gathering.

Typical Implementation Profile

	Low	Med.	High
Non-Recurring Cost	X		
Recurring Cost	X		
Time to Implement	X		
Need for Mgmt. Champion	X		
Short-Term Benefits		X	
Long-Term Benefits		X	