Smarter Meetings with ENTERPRISE ARCHITECT

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Have you ever been to a meeting that was a waste of time?

Do some of your meetings end without the result you need? Or with no result at all?

Having the **right** information available at the **right** time in the **right** format would make everything so much easier.

- Everyone better prepared
- Less confusion over what's required
- Fewer poor decisions made
- Less time wasted
- A clear direction mapped out.

EA gives users access to the all the right information at the right time, and it's simple to format it all to make meetings really productive.

So here are ten top tips for EA users to make your project meetings smarter[1].

1 What outcome do you want?

Be clear about your objectives.
If you need a decision then make that decision an agenda item.
If someone else has requested the meeting, make sure you understand their success criteria.
If the objective isn't clear yet, then don't hold the meeting until it is.

It's good practice to include the objective or desired outcomes in the meeting invitation and to state them again clearly at the start of the meeting. Make sure that everyone there agrees before moving onto the next item. With a clear agenda and objective then you can make sure the meeting won't get side-tracked.

Top Tip #1
Capturing high level objectives and requirements in EA is a good project starting point. Link the objective of any meeting back to one of the high level project goals to remind yourself why it's taking place. If you can't link it back, then that's a good indication that you may be wasting your time and that of your team.

2 Do you need a meeting at all?

Ad-hoc meetings...

Often we organise a meeting because it is easier than thinking - maybe the next steps will become obvious if we just get everyone in a room together... (Unsurprisingly that usually doesn't work, but it is still a popular strategy in some organisations!)
Instead of that, respect your colleagues and value their time.

Have separate one-on-one discussions to get updates, resolve issues and identify if a meeting is really, really required before you send out invitations.

And if a meeting really is the answer, when should you hold it? Rushing in often means poor preparation, and may risk failing to achieving the outcome you need. It can also depend on your development approach - waterfall development teams would try to hold some meetings as soon as possible, agile would hold them as late as possible.

Top Tip #2

All the information for Ad-hoc meetings can be gathered together and printed for the attendees by just creating an EA diagram for the meeting, dragging the relevant elements onto it, then using eaDocX© to print the contents (using the “Contents, no diagram” option).

Regular reviews...

Then of course there are the regular weekly/monthly/etc. meetings to keep stakeholders up to date or to deliver progress reports to the senior management team, and over which we have very little choice. It can sometimes seem as if they divert attention away from the ‘real work’ of project delivery, but for project escalations they really come into their own.

Top Tip #3

For regular meetings, there will be a standard format and prescribed updates. Use EA charts to visually represent project status, and combine these with eaDocX© profiles in Word or Excel to produce your project dashboard.

Top Tip #4

And when you have issues for escalation, create an eaDocX© document containing the issue formatted to include all its related project elements, to make sure all the relevant information is available for a focused discussion of impacts to take place.

3 Who needs to attend?

Meetings are really expensive, just in terms of the hourly rate of everyone in the room/on the conference call/web conference and in the opportunity cost of what they could have been doing instead.

A really scary thing we do sometimes is to calculate the meeting cost of "number of people" x "length of meeting" x "hourly rate" and put the amount in the meeting invitation. That gets people’s attention.

So… Make sure you invite only the right people for the outcome you need, and don't invite anyone who doesn't need to be there.
If you have multiple outcomes and different people required for each part, why not organise a meeting focused on each different outcome? Or set the expectation that attendees don't have to attend for all the meeting - just the parts for which they are needed?

Top Tip #5
In EA you can include all your project stakeholders (internal and external) and link them to project deliverables so it makes it easy to identify who really needs to be involved.

4 What constitutes a quorum?

If you invite 6 people and only 3 can make it then **cancel the meeting**. Obviously you can't meet without all 6 because you already know that all 6 are essential! (see point 3).

Reschedule. But if the schedule won't let you postpone, then get creative.

Are there other actions or decisions you can make that will keep the project schedule on track? Can you get input from the missing people another way? Who else could attend to provide that missing point of view?

If we go ahead and make a decision anyway what are the risks of a poor decision now vs. a (better) decision later?

Top Tip #6
Use the links that exist in EA to understand related elements - these can offer possible alternative decisions that can be made now, investigations or opportunities. Capture risks and issues that are identified by the “poor decision now or better decision later” in EA and document them as part of the meeting output.

5 What information do you need?

Expecting people to make a decision without the correct information results in either a poor decision or no decision at all being made. So to improve the quality of decision making, make sure the right data is available and clearly presented for the outcome you need.

To make it easy for everyone to see the controversial, overdue or problem issues, select the best format to present the information, then filter, sort and highlight key features.

Summaries are useful but the devil is often in the detail. So it's useful to also have sufficient background or relevant information available. That way, everyone can consider the issue in context.

Top Tip #7
Create bespoke documents using eaDocX© showing only the relevant items for the meeting (see Ad-hoc documents), sorted and filtered, with key points highlighted (see Conditional Formatting) and irrelevant data hidden (see Compact documents). Then produce cross reference reports with all the supporting information for your meeting agenda items.

6 How long should the meeting be?

- Make it long enough to do what you need, but not so long that people either won't turn up at all or will drift off before the conclusion.
- With a clear, focused agenda, the right people and the right information prepared in advance, you can use meeting time more effectively and make your meetings shorter.
- Once the meeting objectives have been achieved, stop the meeting
- As meetings are so expensive, start promptly and finish early.
  - Set the example for meeting behaviour that you want others to follow. In many organisations I've come across the standard response of "Is that real time or [company] time?" where [company] time was always 10-15 minutes later than real time... In such cultures meetings often start late and then finish even later and everyone is too rushed to give proper attention to the matter in hand.
  - Schedule all meetings for 25 or 50 minutes only, not 30 or 60. Then everyone has time to get to their next appointment or back to work...
- There are lots of other ways to make meetings shorter e.g. don't provide chairs (made popular in Agile environments). Add your own top tips here...

What techniques do you use with EA to make your meetings shorter or keep them to time?

7 Prepare well.

Make your agenda work for you and order the topics so that you lead the attendees through a logical sequence. Remember that abrupt changes of content and context can make people disengage from the task at hand and then it can take a lot of time and effort to re-focus everyone.

Think about the key people in the room and try to view the problem from their perspective. What else are they bothered about? One way to help them contribute is to make sure they have everything they need to do what you want them to do. By providing each attendee with information beforehand, the meeting can be spent in discussion rather than reading.

Top Tip #8
Create personalised documents with eaDocX© - use the links in EA between the actors and the other elements they are involved to print everything related to that person in their own document. That will help put their project involvement in context. (We have done this and it always goes down well - but does set an expectation that they'll have that for every meeting!)

8 Manage the meeting.

To get the outcomes needed meetings must be managed, but if possible try not to do it all yourself. If note taking is required, delegate. Have a timekeeper. We do it on training courses and at conferences so why not in the office? Note: If you have prepared the attendees beforehand it is easier to keep everyone on track.
Don't forget to give everyone space to contribute and encourage everyone to speak. If non-agenda items arise then note them for future attention and don't let them derail the purpose of this meeting.

One approach to meeting discipline can be that of Theodore Roosevelt: "Speak softly, and carry a big stick" although if you have the CEO in the room that can be career-limiting!
If you need to keep your attendees sweet, or the meeting will take a long time, don't forget the "kaffee und kuchen". To help concentration provide water, and schedule breaks in long meetings.

This is just boring old good practice, applicable whether or not you are using EA.

9 Agree actions.

Meetings are not an end in themselves - they must deliver progress for the project. So always document decisions and agree actions with dates and actionees, and then communicate them. If you don't do this then the meeting may as well have not taken place.

Top Tip #9
You can record actions and decisions in a spreadsheet then import them as Action elements into your EA model. Once there, link them to all the relevant elements (including actors as action owners). This will give you project history and traceability. Then print and distribute the meeting record in an eaDocX© document or eaXL spreadsheet and include the actions/decisions and all their related elements so that attendees and others can see the impacts of their work.

We've found that Including actions like this in EA is a really powerful way of understanding things like "why does the solution look like this?" or being able to track "who requested that requirement to be re-prioritised?". When you get to the end of a project, and some of the project team has moved on, it's the only way to fully understand "how did we get here?" And it provides a key source for the project lessons learnt.

10 Follow up

Make sure that actions are completed.

Top Tip #10
Use EA to capture the progress or change made as a result of the meeting and then communicate it using eaDocX© documents with tracked changes, or capture each set of meeting minutes as an element and store in the model.

Build subsequent activity on the progress delivered at this meeting. Then people will come to your meetings again - because you deliver!

Using these techniques, meetings become highly effective and will deliver real benefits to your projects.

For more information about how eaDocX© can help you make better use of your Enterprise Architect knowledge, visit www.eadocx.com.

[1] By doing this of course I run the risk of being "hoisted by my own petard". But knowing what we are aiming for is half the battle :-).

About the Author

Jackie has >25 years' experience in high technology development in aerospace, health, telecoms and IT, as a project and programme manager, consultant and trainer. She has a track record of leading multi-disciplinary, international teams to efficiently deliver high quality projects on time and to budget.

Jackie is enthusiastic about developing the use of Enterprise Architect, integrating structured analysis & design with best practice Project Management, sharing EA insights with key stakeholders and releasing project teams to do what they do best.

Jackie is a Director and the founder of Ability Engineering Ltd, and the CEO of eaDocX Ltd. eaDocX© is the Sparx Systems approved Microsoft Office integration Extension for Enterprise Architect.