Ventana Solution Series™

Staff Meetings
for Workgroups

A Guide for Team Leaders and Participants

Michael H. Simons

Work as a distributed team to:

- ❑ Share Information
- ❑ Review Progress
- ❑ Report Status
- ❑ Raise Issues
- ❑ Capture Knowledge in an Organized Structure
- ❑ Perform as a Highly Effective Team

Local Area Network Edition

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TEAM LEADER INSTRUCTIONS

Welcome!

Welcome to *GroupSystems® Staff Meetings for Workgroups*! Congratulations on joining the high-performance world of collaborative technology for work teams.

With *Staff Meetings for Workgroups* you and your team will streamline and improve productivity of those often-painful staff meetings.

Organizations have achieved substantial benefits using *Staff Meetings for Workgroups* for:

- Weekly staff status checks
- Information sharing
- Reduced conference call duration
- Knowledge management
- And more!

Note: You must have *GroupSystems Workgroup Edition* installed on your network to use *Staff Meetings for Workgroups*. In the remainder of this Guide, the term “Workgroup Edition” will include all versions 2.x of the software, and may be abbreviated as *WGE*. *Staff Meetings for Workgroups* may be abbreviated as *Staff Meetings* (italicized).

Ventana Corporation Technical Support: (800) 325-8026

Software and Hardware Requirements

Minimum Requirements

GroupSystems Workgroup Edition

Network Operating Systems
Novell NetWare version 3.11, 3.12, 4.1, or Windows NT Server 3.51, 4.0 *(with Service Pack 3)*

Client Operating Systems
Microsoft Windows version 3.1 or 3.11, or
Windows 95, or Windows NT Workstation 3.51 or 4.0

File Server
A dedicated file server with 32 MB RAM
and at least 40 MB free disk space

Workstation
486 processor, 16 MB RAM, color monitor, hard drive

Local Area Network
Ethernet (10 Mbps) or Token Ring (16 Mbps)

Recommended Configuration

Network Operating Systems
Windows NT Server 4.0 *(with Service Pack 3)*

Client Operating Systems
Windows 95

File Server
Pentium-based, 64 MB Ram, 1 GB hard drive,
32 bit Ethernet network card

Workstation
Pentium-based, 32 MB RAM, 30 MB free hard disk space reserved for *GroupSystems* executable files

Local Area Network
100 Base-T Ethernet

Understand *Staff Meetings for Workgroups*

Remember This...

> If your face-to-face meetings are JUST PERFECT RIGHT NOW, then consider using this *Staff Meeting* template for only the face-to-face portion of the process (along with a designated “scribe” to capture verbal contributions during the meeting).

A successful staff meeting is a regularly scheduled, timely sharing of information and decision-making, where everybody contributes, and complete records are made available in a timely fashion.

Since staff meetings usually involve status reports and information sharing (communication which could occur prior to a face-to-face meeting), teams are more effective when this basic information exchange occurs in a structured process and activity *prior* to the actual face-to-face event.

Staff Meetings for Workgroups provides you and your team with a process and structure with which to improve communications, capture all of the necessary information in a legible and timely fashion, and streamline the synchronous face-to-face activity so we can “get back to our day jobs”. The net result is time savings (and therefore, money), complete records, and fewer headaches.

Conducting staff meetings using *GroupSystems* will save your team the time and expense associated with traditional face-to-face staff meetings. The electronic format allows team members to contribute status information and ask questions of one another at any time that is convenient for them. The staff meeting is accessible at all times, and is unaffected by differences in schedules, time zones, etc.

When the team wants to meet face-to-face, the information from the *GroupSystems* staff meeting can easily be used as a reference point, making face-to-face work more productive.

Process

With *Staff Meetings for Workgroups*, your team will use a structured format to work through four steps:

1. **Contribute in advance.** Prior to the face-to-face event, the team leader sends an electronic invitation to the meeting participants.

Upon acceptance of the invitation, each team member joins that week's activity. Members submit status information, requests for information, requests for decisions, and share data, information, and opinions from their desktops. Members must participate in this distributed event prior to the synchronous meeting. This asynchronous preparation is the key to successful *Staff Meetings for Workgroups*.

2. **Meet synchronously.** The team meets face-to-face. The team members respond to requests for information, requests for decisions, and capture last-minute updates. A team "scribe" can capture this last-minute verbal information in the activity.

3. **Follow through.** After the face-to-face meeting, members can refer back to the meeting at any time. A report can be created and distributed easily to other departments and management.

4. **Repeat.** Repeat this process for each regularly scheduled meeting. Consider using this format prior to ad-hoc meetings as well.

The following steps will be covered:

1. Create a folder in *GroupSystems* for the staff meeting.

2. Create a master copy of the electronic staff meeting in the format you prefer. You will copy this master to create subsequent staff meeting activities.

3. Invite the team members who should participate in the staff meeting. This can easily be done via your company's e-mail package by sending a link to the *GroupSystems* staff meeting.

4. Contribute status information to the staff meeting, then edit and organize that information.

5. Create, view and distribute electronic or paper reports to maintain an accurate and detailed record of the staff meeting activity.

This guidebook lays out the steps with sufficient detail that beginning users can navigate the process smoothly and efficiently. Team leaders and team members who have basic familiarity with the tools and use of *GroupSystems* will have an even shorter learning curve.

What is *GroupSystems*?

GroupSystems Workgroup Edition (WGE) is a suite of tools to structure and enhance team effort. WGE can vastly improve your organization’s planning, decision-making and idea-gathering processes, and increase productivity. It is based on more than 10 years of real-world group decision software use.

GroupSystems Workgroup Edition supports group processes such as:

- List building and information gathering
- Brainstorming, problem solving and decision making
- Organizing, prioritizing and voting
- Project planning and tracking
- Knowledge management, process improvement and business planning

The tools are used interactively by people working at separate computers or face-to-face.

How People Connect Using *GroupSystems*

WGE lets all members of your team exchange ideas anonymously and simultaneously—regardless of their location in the world—via local area network (LAN) or the Internet.

You can also run WGE over the Internet, via a browser. Contact Ventana Corporation for information on how to do this.

Remember This...

> If you have a question about how to use *GroupSystems* while you are participating in an activity, click the **Help** button. You will see instructions that are specific to the window you are in.

Section I

Getting Started

Staff Meetings
for Workgroups

Steps

- ❑ Before You Begin
- ❑ Plan the Staff Meeting Format
- ❑ Launch the Staff Meeting

Before You Begin

Before you begin using *Staff Meetings for Workgroups* with your team….

Check the system:
(Get help from your GroupSystems administrator if need be.)

1. Ensure that all team members' computers have an icon pointing to the same installation of *GroupSystems,* using the same drive mapping on the LAN (for example, V:/Ventana/Gswin/).

2. Ensure that all team members have *GroupSystems* login names and passwords in the *GroupSystems* Organizational Roster. It is possible to include the login name and password on the command line of the *GroupSystems* icon. You must decide whether your facility provides adequate security for this approach.

3. Learn how to log into *GroupSystems* if you don't already know. Ask your *GroupSystems* administrator for a lesson if you need one.

Do your homework:

1. Read the *Staff Meetings for Workgroups* guidebook from start to finish to be sure you understand the process. You may write notes to yourself in the wide margins provided in this guidebook.

2. Try out each technical instruction to be sure you understand how to use the software.

3. Practice the process on a small group before introducing it to the whole group.

Plan the Staff Meeting Format

It will be helpful for the team leader to consider his or her department's specific needs before launching the *GroupSystems* staff meeting.

- Does your staff need frequent face-to-face contact, or not as much?
- Do you have team members at several geographic locations, or who work rotating schedules?
- Does your staff travel frequently?

Each of these considerations will affect how you plan the *GroupSystems* staff meeting process.

When introducing the process to your team, it may be a good idea to start with a weekly electronic staff meeting that is followed by a now shorter, less frequent and more efficient face-to-face meeting.

Once the group has become accustomed to the electronic format, you may find that it is less important to meet every week because much of the relevant information has been captured in the *GroupSystems* staff meeting.

Launch the Staff Meeting

Why do you wish to do this? Perhaps your current staff meetings last over an hour, or are an unproductive waste of time. Perhaps meetings are frequently cancelled or rescheduled due to schedule conflicts.

Experience shows that staff meetings do not require all participants to be “present” as long as their information is captured and otherwise available to other team members.

- Determine your goals.
- Get buy in from your team (why we are doing this—what are your thoughts about our current staff meetings?).
- Remind them what they are missing—they may love not having to spend hours of their day talking about who should change the toner in the copier!
- Tell them how it will be done.
- Lay out your requirements and expectations of them.
- Remind them that the face-to-face portion is not going away; it’s just more streamlined and productive this way.
- Be sure deadlines and deliverables are explicitly defined.

Remember This...

Challenges of Asyncronous Work

Keep in mind that successful asynchronous work is challenging and very different than face-to-face work. A major issue for asynchronous teamwork involves interruptions. These interruptions often involve the telephone, fax, email, and people "stopping by your desk". All of these things are likely to seem more urgent than contributing to the *Staff Meeting* outline. As Stephen R. Covey discusses in his book, *The Seven Habits of Highly Effective People*, we often devote time to tasks that are urgent, such as ringing telephone, even though a more important but not as urgent task awaits us.

Motivating teams thus becomes a crucial leadership task. Make sure responsibility is clearly delegated at the outset of the asynchronous teamwork.

Remember This...

Maintaining the Gains

You should experience streamlined staff meetings after implementing the Staff Meeting. You should also experience increased information sharing, better organizational memory, and easier knowledge management. To help maintain these gains, keep in mind the following:

- Help the solutions succeed—work as a team to identify any barriers to success and deal with them.
- Show measurable improvement - measure your meeting times and satisfaction (before and after the process is implemented). *See* 'Section VI: Resources' *for a participant survey.*
- Make periodic checks - make sure everyone is participating and accepts the process (perhaps during the face-to-face portion of the meeting).
- Develop and follow procedures - does your team require additional guidelines?
- Determine if *GroupSystems* will be effective elsewhere!

Section II

Setting up the Technology

Staff Meetings
for Workgroups

Steps

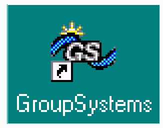
- ❑ Log in to *GroupSystems*
- ❑ Create the *Staff Meetings* Folder in *GroupSystems*
- ❑ Create the List of Members
- ❑ Create the *Staff Meeting* Master
- ❑ Copy the *Staff Meeting* Master
- ❑ Test *GroupSystems*

Log in to *GroupSystems*

Log in to *GroupSystems* as a **full-access** user. This procedure will vary greatly from organization to organization. Get help from your *GroupSystems* administrator if you need it.

Do This...

1. Use the **Start** button in Windows 95 to find and load *GroupSystems* (or double-click on the *GroupSystems* icon if it is on your desktop).



2. The *GroupSystems* log-in dialog appears.

3. Enter your login name (as provided by your system administrator) and optional password.

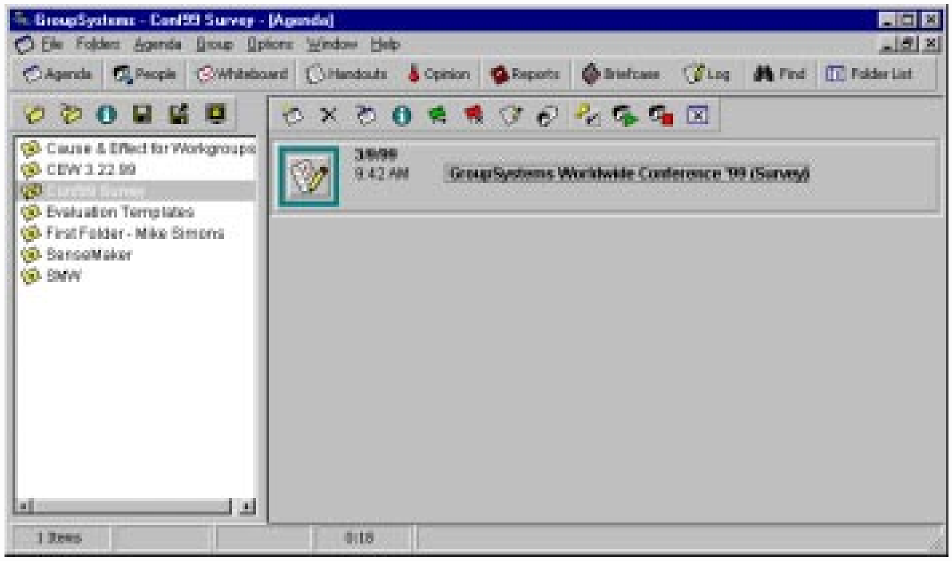
4. Choose **OK**.

(continued...)

Do This...

(...continued)

5. When you have logged in, you should see a screen that looks something like this:



6. *GroupSystems* will automatically open the most recently used folder.

Remember This...

Your screen may vary because you or someone else may have hidden some or all of the application bar's buttons. Also, the last activity you were accessing will be open when you log in.

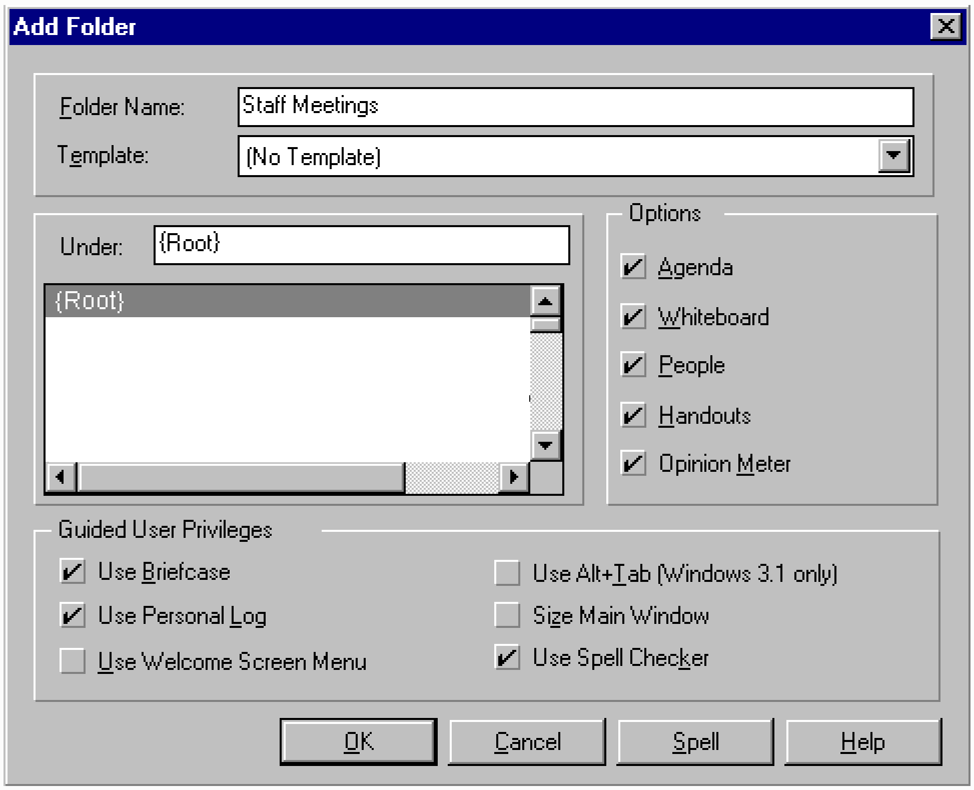
Create the *Staff Meetings* Folder

Do This...

Create a new folder.

1. Click the **Add Folder** button on the toolbar.
   OR from the **Folders** menu, choose **Add Folder**.

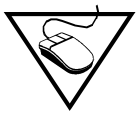
2. Type the name for your staff meeting in the **Folder Name** text box.



3. Select the folder under which you want to place the new folder. By clicking on {Root}, the new folder will appear as a main folder (rather than a subfolder).

4. Click **OK.** The folder is now ready for you to use.

Create the List of Members



Do This...

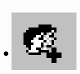
(The members cannot access or be invited into any activities in the meeting until you include them on the folder roster. When new employees join your team, make sure to add them here.)

Create the list of members.

1. Click on the **People** button. 

   OR click the **Windows** option on the main menu bar and select **People**.

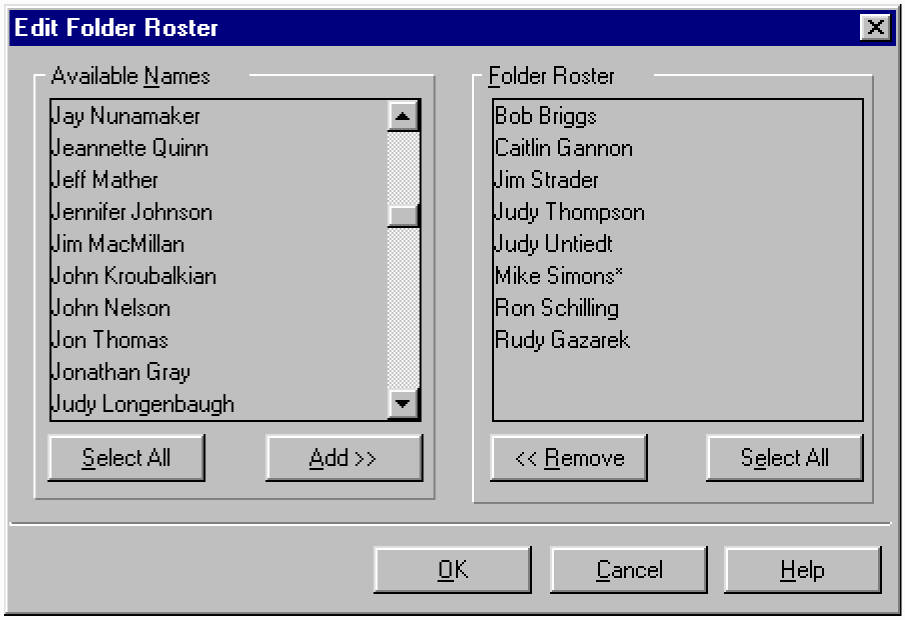
2. A **People** dialog like this should appear:

3. Click on the **Roster** button. 
   The **Edit Folder Roster** dialog will appear.

(continued…)

Do This...

(...continued)



4. Select the available names from the left side and click the **Add** button to add them to the folder roster on the right side of the dialog window.

5. Click **OK** when you are done.

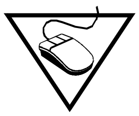
6. The **People** window should now show the names of the members you will include in the session.

7. Click the **Close** button to close the **People** window.

Create the *Staff Meeting* Activity Master

In the folder that you just created, you will now need to create a "master" of the Staff Meeting activity. You will then be able to save time by copying the information from the master for each new staff meeting.

Create the *Staff Meeting* Master



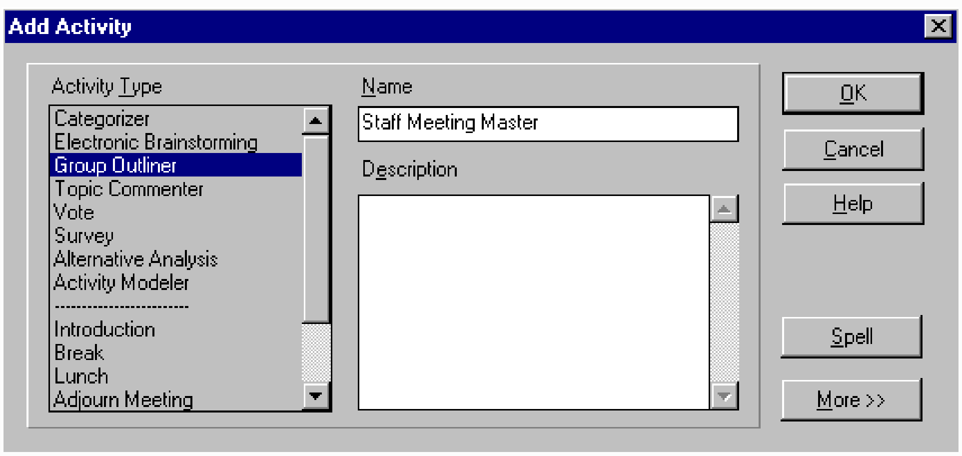
Do This...

1. From the folder that you created earlier, click on the **Agenda** Button. 

OR, click the **Windows** option on the main menu bar and select **Agenda**.

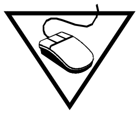
2. Click the **Add Activity** button on the toolbar. 
OR, from the **Agenda** menu, choose **Add Activity**.

3. Choose **Group Outliner** as the activity type.



4. Type "*Staff Meeting Master*" into the **Name** field (and if desired, enter a more detailed description in the Description field).

5. Click **OK**. The new *Staff Meeting Master* activity will now appear on the Agenda.

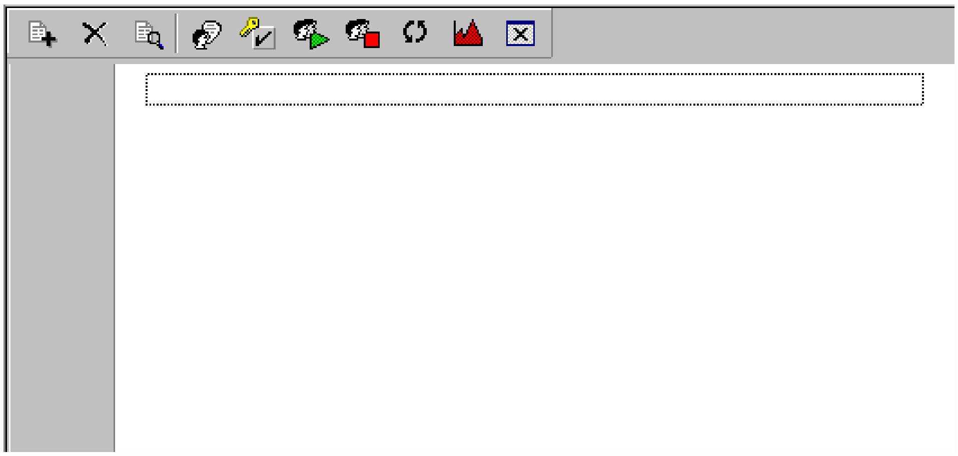


Do This...

Configure Group Settings

Be sure to configure the *Staff Meeting Master* activity with the following Group Settings for your team.

1. Open the activity by double-clicking on it. You will see a blank **Group Outliner** screen that looks like this:



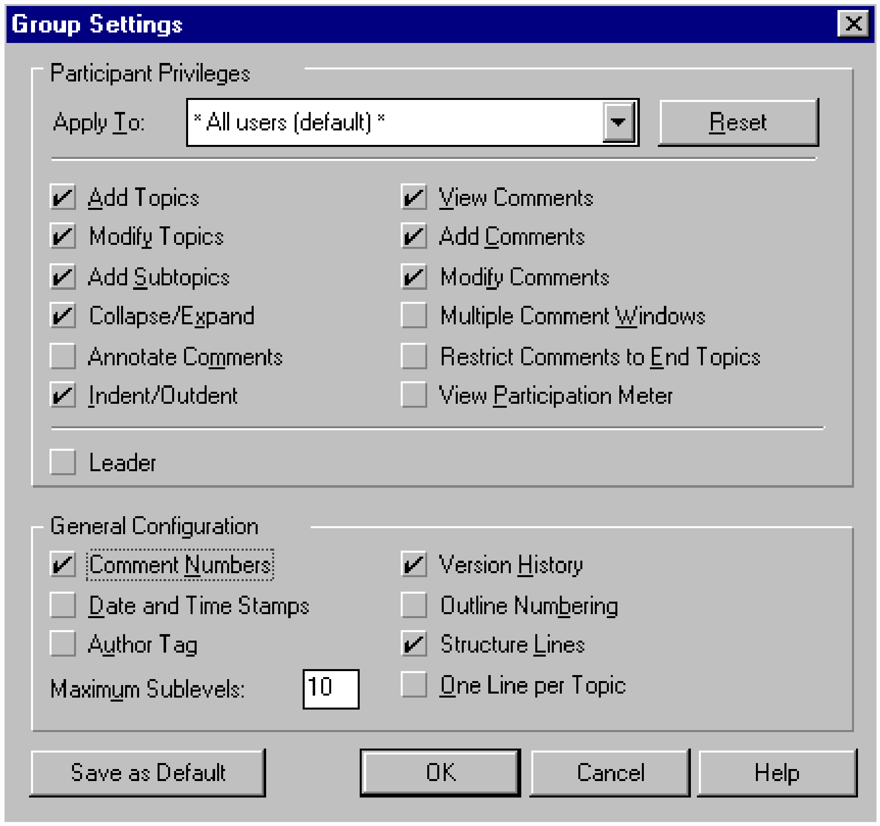
2. Click the **Group Settings** button. 

(continued...)

Do This...

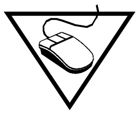
(...continued)

3. Configure the **Group Settings** as in the picture below:



4. Click **OK.**

5. Close the Group Outliner activity.

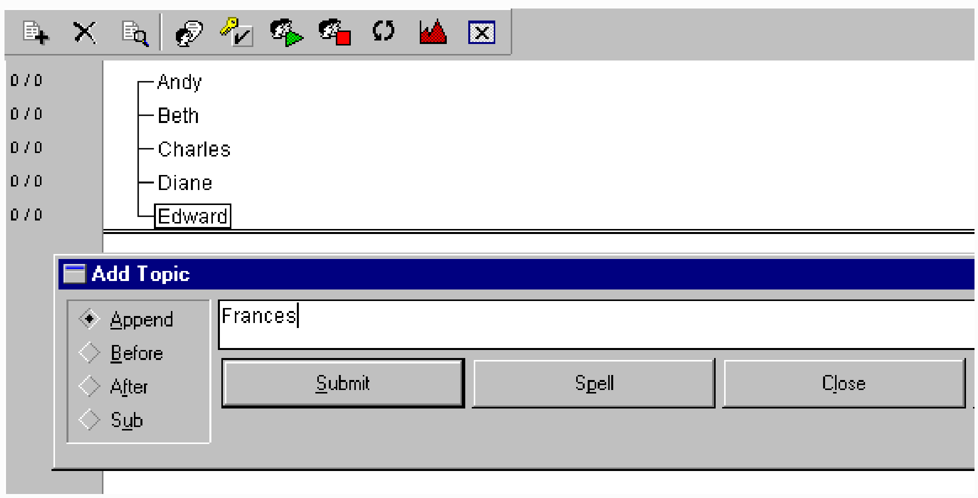


Do This...

Add to and modify the outline

1. There are several formats that work well with the asynchronous portion of the staff meeting. You may create headings for each staff member's name, or add headings related to functions that your department performs. Choose the one that would be best for your team. *(If you choose to group entries by topic rather than person, see Section V for information on how to turn on Author Tags.)*

2. To add a staff member name or topic, click once where you want to insert the topic, then click the **Add Topic** button. 
   Select the **Append**, **Before** or **After** radio button at the left of the Add Topic window, enter the text for the topic name, and click **Submit**.



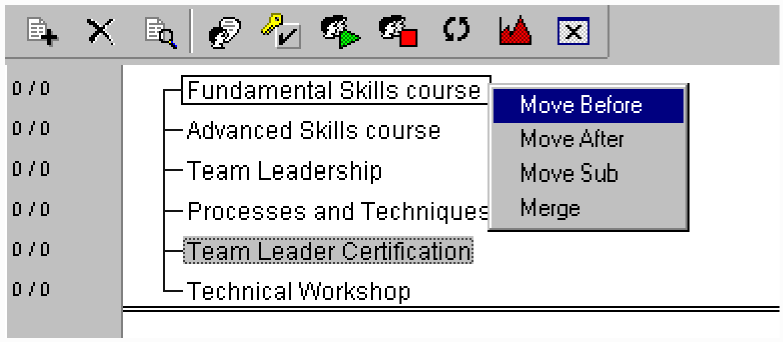
3. To change a staff member name or topic, close the Add Topic window, click once on the topic and press <**F5**>. Modify the text as necessary, and click **Submit**.

(continued...)

Do This...

(...continued)

4. To move a staff member name or topic, click and drag the topic on top of another, and select **Move Before** or **Move After** from the menu that appears.



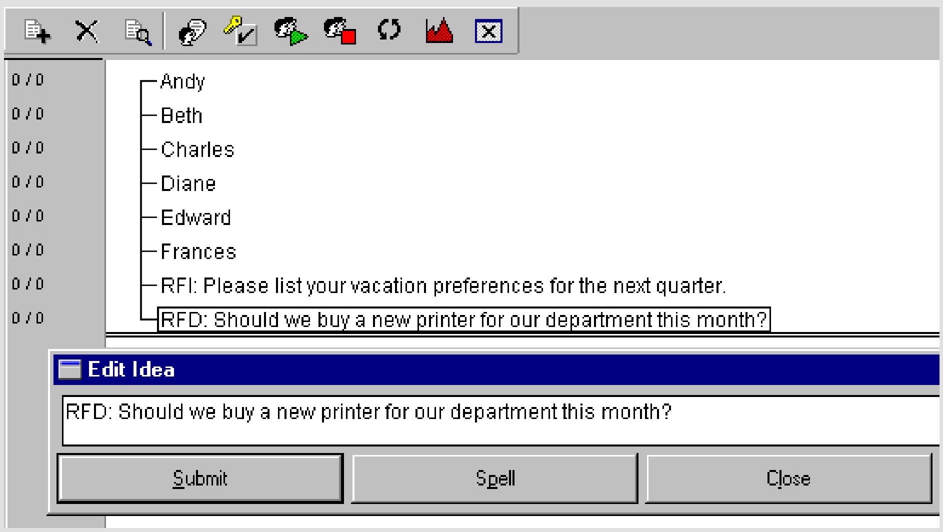
5. To remove a staff member name or topic, click once on it and press the **Delete** key on your keyboard.

Remember This...

Requesting Additional Information from the Team

1. You can also use TLA's (three letter acronyms) to request specific information from the team. Two recommended TLA's are:

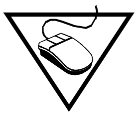
   - RFD (Request For Decision by the group as a whole)
   - RFI (Request For Information from group in general)



Remember This...

Several days prior to each new meeting you will need to copy the *Staff Meeting Master* to a new Agenda activity, modify its name, and start the team members using the instructions in *Section III*.

Copy the *Staff Meeting* Master



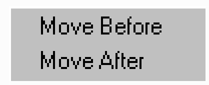
Do This...

1. Click once to select the *Staff Meeting Master* activity on the agenda.

2. Press **<Ctrl-C>** or from the **Edit** menu on the menu bar, select **Copy**.

3. Move the mouse to the bottom of the Agenda and highlight the last activity on the list. Press **<Ctrl-V>** or from the **Edit** menu on the menu bar, select **Paste**. This will insert the copied activity at the bottom of the agenda.

4. To move the agenda activity, click on it once and drag it on top of another activity on the agenda. Let go of the mouse button and choose **Move Before** or **Move After** from the menu that appears.



5. Press **<F5>** and edit the activity name to reflect the current date.

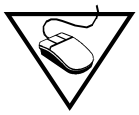
6. Click **OK.**

Remember This...

People don’t like to see their names consistently “at the bottom of the list” (unless you are using alphabetical order). Consider moving their names around in the outliner from meeting to meeting, perhaps moving the person at the bottom to the top of the list the next week.

Refer to the section “Add to and Modify the Outline” for help moving information in the outline.

Test *GroupSystems*



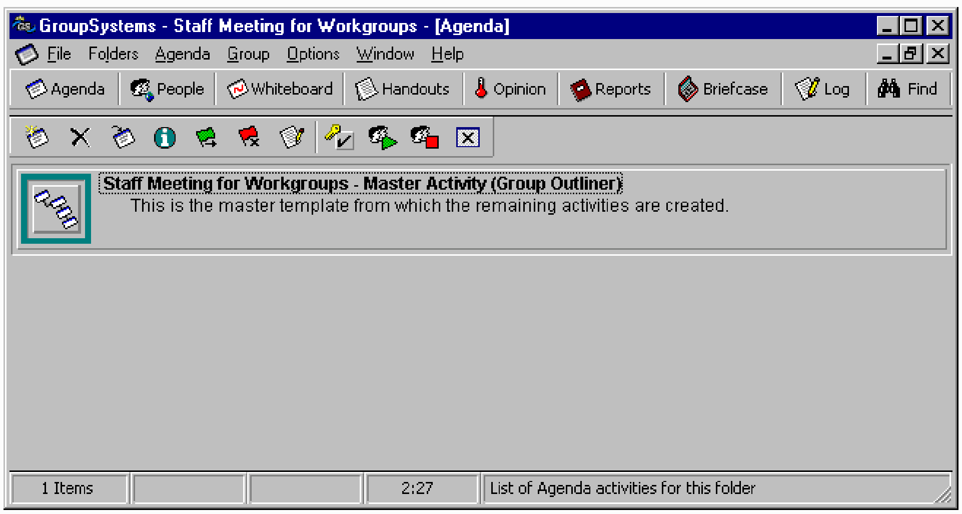
Do This...

Test that *GroupSystems* is running correctly.

1. Ask another team member to log in to *GroupSystems* on another computer.

2. From the team leader's station, click on the **Agenda** Button. 

   OR, click the **Windows** option on the main menu bar and select **Agenda**. The **Agenda** window like this should appear in the leader's workspace:



3. Select the *Staff Meeting* activity on the agenda and double-click it. This opens the group outline on the leader's station.

4. Click the **Start Participants** button. 
   The **Start Participants** dialog will appear.

5. Click the **Select All** button (or click the name of the participant who logged in in Step 1), then click **OK.**

(continued...)

Do This...

(...continued)

6. Check to see that the Group Outliner appears on the participant's screen. Contact your *GroupSystems* administrator if you have problems.

7. Click on the **Stop Participants** button.
   A Stop Participants dialog will appear.

8. Click **Select All** to select all participants, then click **OK**.

Section III

Meeting "Virtually"

Staff Meetings
for Workgroups

Steps

- ❑ Start the Team Members in *GroupSystems*
- ❑ Invite Team Members via E-mail
- ❑ Access the Staff Meeting from an E-mail Message
- ❑ Access the Staff Meeting Manually
- ❑ Review and Update Status Information
- ❑ Request Information and/or Decisions of the Group
- ❑ View and Print Electronic and Paper Reports

Start the Team Members in *GroupSystems*

After you have created the Agenda activity you need to start the team members. Even if team members miss your “invitation” they will still be able to access the activity as long as you have started it for them.

Do This...

1. Open the **Agenda** by clicking on the **Agenda** button.
   

2. Double-click to open this week’s *Staff Meeting* activity on your own screen.

3. Click on the **Start Participants** button. 

4. Click on the **Select All** button to select all participants, then click **OK**.

Invite Team Members via E-mail

The first few times you conduct an electronic meeting, you will probably want to remind the staff to log in to *GroupSystems* and report their status information. Thereafter the group may not require reminders to update their information.

If necessary, use the invitation to remind members about the time frame which they should follow when contributing to the *Staff Meeting*.

You can use e-mail to invite staff members to join the staff meeting.

Send a GroupSystems Invitation via E-mail

Do This...

1. From the **Agenda** list, select the activity for which you want to view information.

2. From the **Agenda** menu, choose **View Activity Information**, or select the **Info** button.
   The **Activity Information** dialog box appears.

3. Click the **Copy Link** button, then click the **Close** button to exit the current dialog box.

4. Minimize *GroupSystems* and any other programs running so that your desktop is visible.

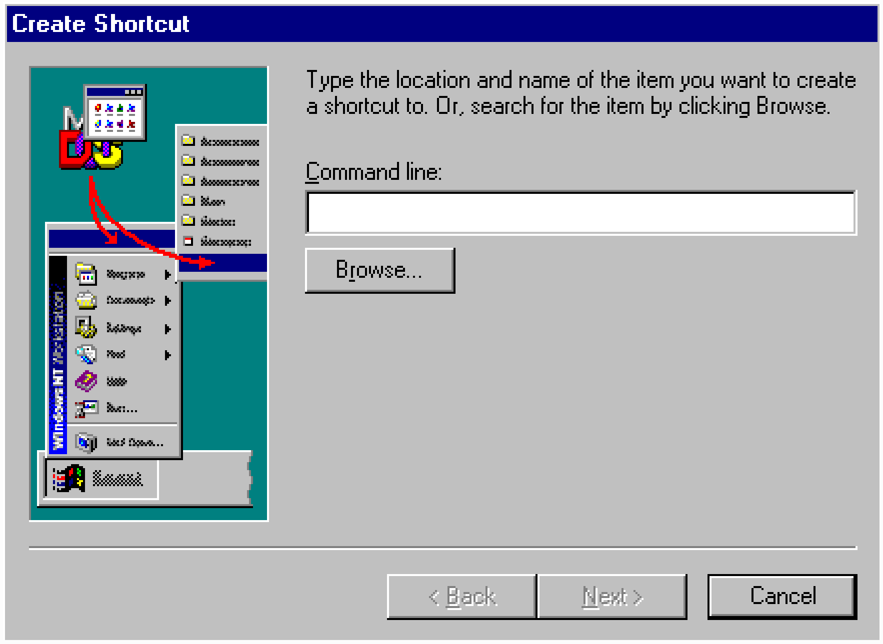
5. Right click on a blank area of the desktop, and from the menu choose **New—Shortcut.**

6. Paste the copied link into the command line and click **Next.**

(continued...)

Do This...

(...continued)



7. Give the shortcut a logical name, and click **Finish**.

8. Open your e-mail program, create a new e-mail message and address it to the people you would like to receive the link.

9. Position the window of the e-mail message so that it covers only part of the desktop. Drag the shortcut you just created from the desktop onto the body of the email message.

10. Compose an invitation to the members (as in the example on page 35). Remind the members:

    - Of specific deadlines for contribution;
    - That a face-to-face meeting will attempt to resolve anything that has not been resolved online; and
    - They may need to log in more than once to “wrap things up”.

11. Send the message.

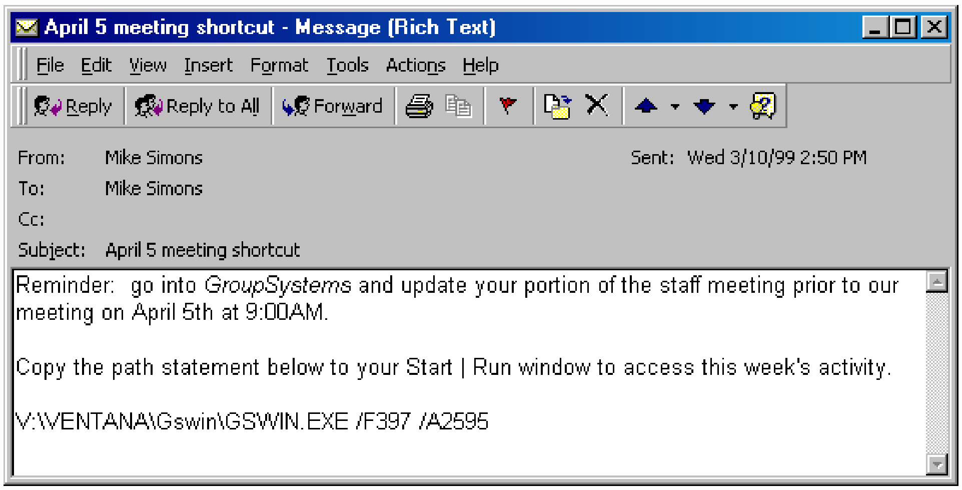
Do This...

Alternate Method

You may also send members a path statement they can use to launch the *GroupSystems* folder.

1. Complete steps 1-3 and 8 above.

2. In the message area of the e-mail, press **<Ctrl-V>** to paste the copied link as a DOS path statement. Type any additional information or instructions, as necessary.



PARTICIPANT INSTRUCTIONS

Access the Staff Meeting from an E-mail Message

The team members will receive an e-mail message from the team leader and use the link to launch the *GroupSystems* activity.

Do This...

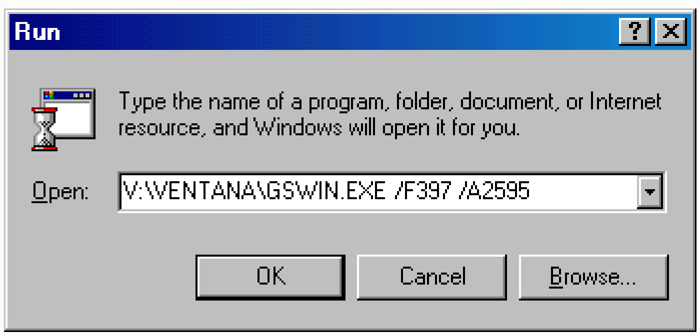
To launch the *GroupSystems* activity:

1. If you receive an e-mail message with a *GroupSystems* link in it, double-click the link to launch the program.

2. If you receive a path statement instead, highlight the link's path in the message and press **<Ctrl-C>** to copy to the clipboard.

3. Go to the Windows Start menu and select **Run**.

4. Press **<Ctrl-V>** to insert the link into the command line.

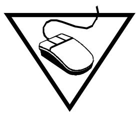


5. Click **OK**.

Access the Staff Meeting Manually

Refer to the Login instructions at the beginning of *Section III: Set Up the Technology.*

When you log into *GroupSystems* the name of the current folder appears in the program title bar. If you are not in the folder where the staff meeting resides, switch to that folder using the Folder List.



Do This...

1. Click the **Folders** button on the toolbar. 

   OR, from the **Folder** menu on the main menu bar, select **Folder List**.

2. Find the designated staff meeting folder and double-click it to open it.

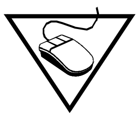
3. From the **Folder** menu on the main menu bar, deselect **Folder List**.
   OR, click the **Folders** button on the toolbar to close the Folder List. 

4. Looking at the **Agenda**, double-click the activity for the current week (whichever week you want to open).

Review and Update Status Information

Communicate general status update information for your team asynchronously. When you do meet as a team, the face-to-face meeting will take much less time because everyone will already have the information they need.

Adding Status Information

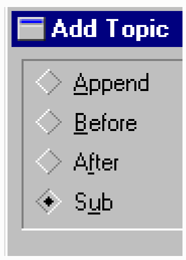


Do This...

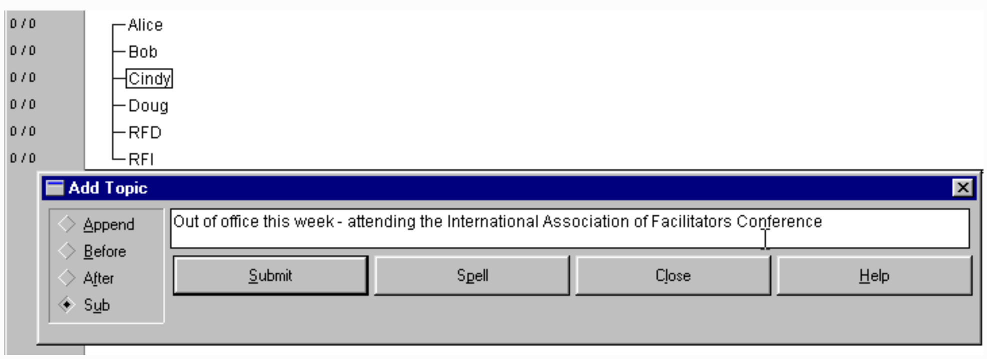
1. With the mouse, select your name or the appropriate heading on the outline.

2. Click the **Add Topic** button. 

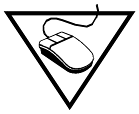
3. Select **Sub** on the left side of the **Add Topic** dialog window.



4. Type your information and click **Submit**.



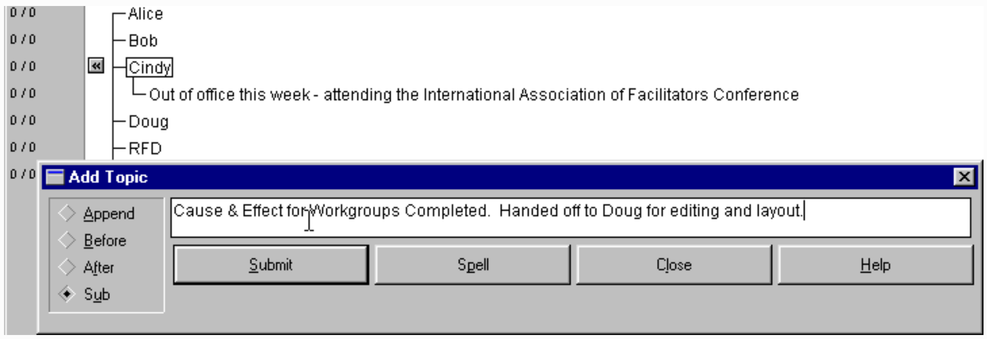
(continued...)



Do This...

(...continued)

5. Repeat as necessary.

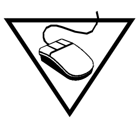


6. Click **Close** to exit the **Add Topic** dialog window.

Note: When a new topic is submitted by another staff member, the other members may see a red exclamation point (**!**) next to that topic. These will go away each time you exit the activity or as you select and read each topic on the outline.

To clear all the red exclamation points from the topics, choose **Clear New Markers** from the **Edit** menu.

Editing Status Information



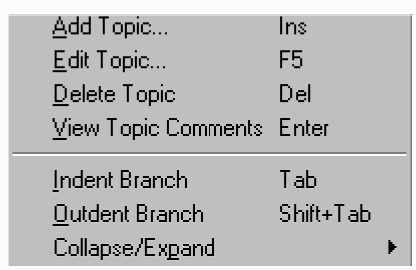
Do This...

1. With the mouse, select the branch on the outline you want to edit.

2. Press **F5**. The **Edit Topic** dialog appears.

3. Revise the text, then click **Submit**.

Note: In addition to the drop-down menus and application buttons, you can *right-click* your mouse button on the selected topic to access the following menu:



Moving and Merging Status Information

After adding status information within your area of the outline, you may find it necessary to move a topic to a different position in the outline (or to merge two topics).

Do This...

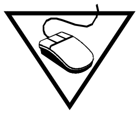
1. Select the topic from the list (it will become highlighted).
2. Drag the topic text to a new area of the outline. The mouse pointer changes to a white page with the corner turned down. A topic will display a box outline as the mouse pointer is moved over the topic text.
3. Release the mouse button when the desired area displays the box outline.
4. Select either **Move Before**, **Move After**, or **Move Sub** from the popup menu.

Adding and Viewing Comments

Use comments to pose a question or to provide guidance and/or suggestions to a specific person. You can add comments to any area of the outline.

There are two comment counters to the left of each topic name. The first number refers to the total number of comments, and the second number refers to the comments not seen by the staff member.

For example, “8/2” indicates that eight comments are attached to the topic, but two of them comments have not been viewed. Once the staff member views the comments (through the Comment window) the counter will display “8/0”.

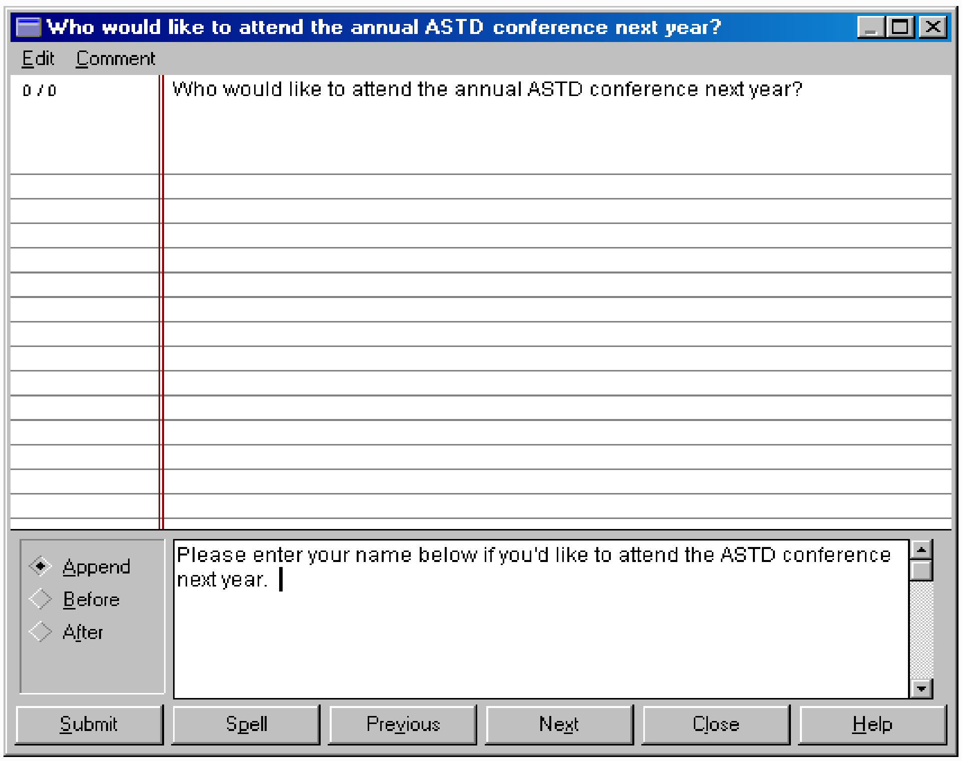


Do This...

1. Close any dialog windows that are open.

2. Select the desired outline topic. Double-click the topic, or click the **View Comments** button. 

3. A comment window appears that displays the selected topic in the title bar. Any existing comments will be listed in the public text area. The insertion point is binking at the bottom of this window in the comment editing pane.



4. Type in your comment and click **Submit**.

When a new comment is submitted by another staff member, the other members may see a red exclamation point (**!**) next to that comment in the Comment window. These will go away each time you exit the Comment window or as you select and read each comment.

To clear all the red exclamation points from the comments in a particular window, from the **Edit** menu, choose **Clear New Markers**.

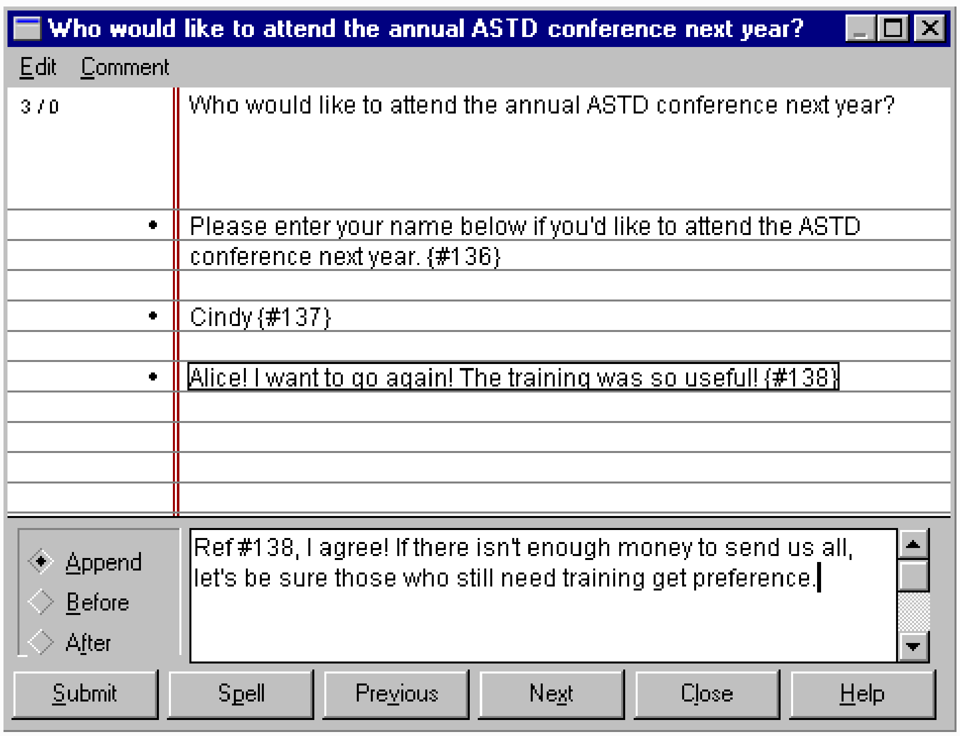
Do This...

Refer to comments made by others using the following format:

1. Select the comment you wish to reply to with the mouse. Note the comment number that appears after the comment.

2. Click once in the text window.

3. Type your comment, prefaced with “Ref #x...” to refer directly to that comment.



Request Information and/or Decisions from the Group

Using the RFD (Request For Decision)

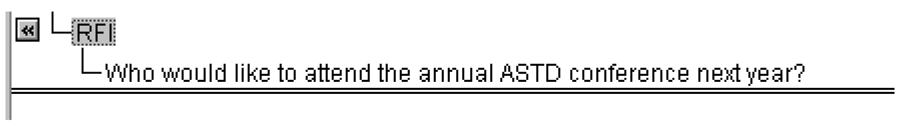
When you wish to request a decision from *the group as a whole*, add this as a subtopic to the RFD area of the outline. Give the RFD a short "headline" as the subtopic, and enter more specifics as comments. The staff will discuss each RFD using Add/View Comments.

Decisions can be made face-to-face or via *GroupSystems* resources such as Opinion Meter. Remember, you can request a decision *from a particular member* by adding your question as a comment to their name on the outline.

Using the RFI (Request For Information)

When you wish to request a information from *the group as a whole*, add this as a subtopic to the RFI area of the outline. Give the RFI a short "headline" as the subtopic, and enter more specifics as comments. The staff will discuss each RFI using Add/View Comments.

See the following example:



Remember, you can request information *from a particular member* by adding your question as a comment to their name on the outline.

View and Print Electronic and Paper Reports

You can share your *Staff Meeting* information with others. You can print this information, or the leader can create an electronic report to be included as an e-mail attachment, for example. Reports and printouts can be created and viewed during or after any *GroupSystems* activity (see Section IV).

To View an Electronic Report

Do This...

1. Click the **Reports** button on the main toolbar. Reports
   OR, from the **Window** menu, choose **Reports**.
   The **Reports** window will appear.

2. Select the report you wish to view and click the **View Selected Report** button.
   OR, double-click on the report icon. The text of the report will appear in a separate application window.

3. Use **File—Save As** to save a copy of the text to be emailed as an attachment. To send just the text, use **Edit—Copy** followed by **Edit—Paste**.

To Print a Report From Within the Activity

The leader can quickly print out the data from a single activity through the Print command on the File menu.

Do This...

1. Make sure the window for the desired activity is open.

2. From the **File** menu, choose **Print**. The **Print** dialog box appears.

3. Choose your desired report options and click **OK**.

Section IV

Follow-up Activities

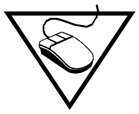
Staff Meetings
for Workgroups

Steps

- ❑ Create Electronic Reports
- ❑ Temporary Leader Privileges

Create Electronic Reports

The leader can quickly create an electronic report of individual activities or of the entire list.



Do This...

1. From the **Window** menu, choose **Reports**.
   OR, click the **Reports** button on the main toolbar. 

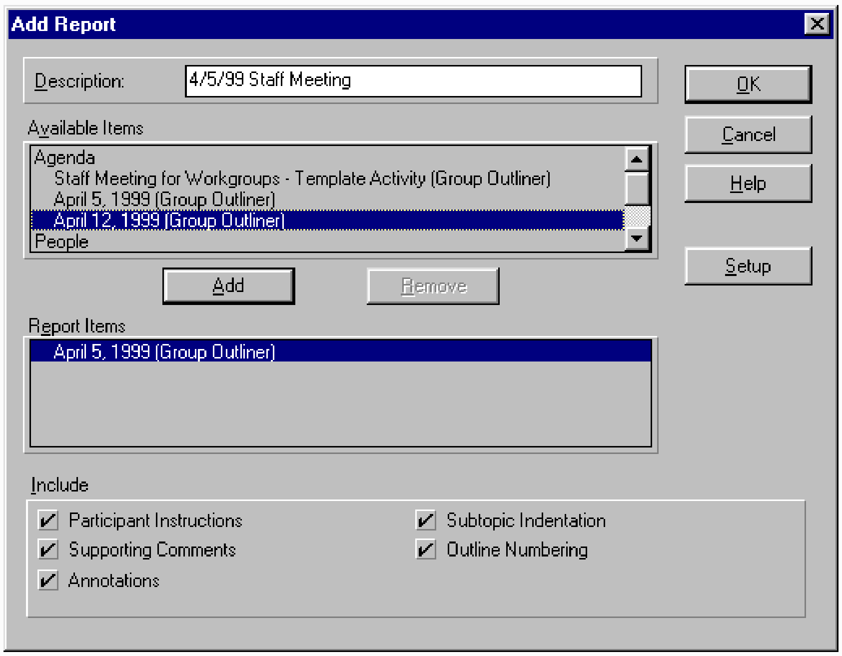
   The **Reports** window will appear.

2. From the **Reports** menu, choose **Add Report.**
   OR, click the **Add Reports** button on the toolbar. 

3. Enter a name for the report.

4. Select the activity from the *Available Items* list box.

5. Choose **Add**. The item will appear below in the *Report Items* list box. Options appear in the *Include* section of the dialog box. The cursor will drop down to the next item on the *Available Items* list box.



(continued...)

Do This...

(...continued)

6. Repeat steps 4-5 to add more items to the report.
   Note: To remove an item from the *Report Items* list box, select an item from *Report Items* and click the **Remove** button.

7. Click **OK** to create the report.

8. After a moment, the report will appear in the Reports window. A Windows Write, Notepad, MS-Word or WordPerfect icon will diplay next to the report name indicating its file format.

Temporary Leader Privileges

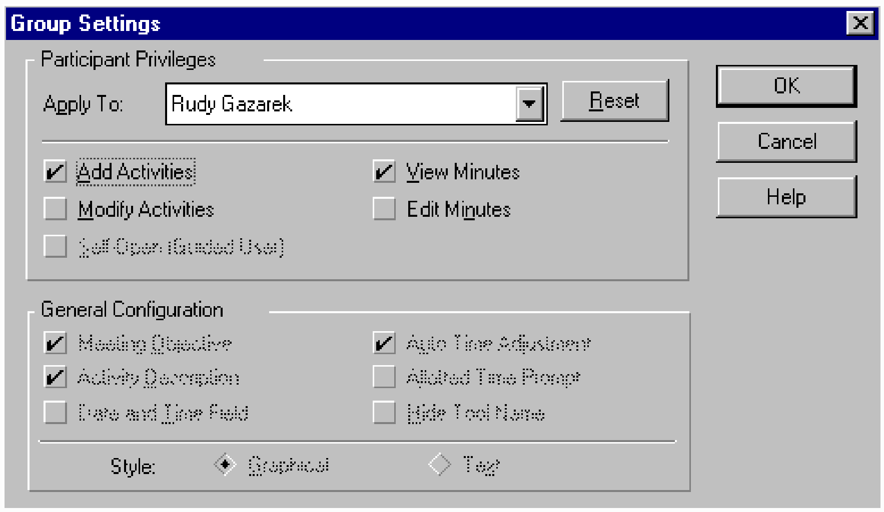
If the team leader is out of the office or unable to create the new staff meeting for the week, that person can temporarily give these privileges to another team member.

Do This...

1. Open the Staff Meeting folder.

2. From the **Agenda**, click the **Group Settings** button.

3. In the **Apply To:** window, choose the person you want to give the privileges to.



4. Select **Add Activity.** This will give the person the ability to add a new agenda activity, which will automatically give them full rights within that activity.

5. Click **OK**.

6. When you no longer wish for that team member to have these privileges, repeat the above and reverse Step 4.

Section V

Supplemental Information

Staff Meetings
for Workgroups

Steps

- ❑ Choose the Participants
- ❑ Set Expectations
- ❑ Set Up Author Tags

Choose the Participants

The success of a successful *Staff Meeting* depends in part upon having the right people involved. The list must include *your* staff. Your staff should understand the reason why this new process is being used, what their role(s) are, how their contribution / participation will be evaluated, and how they will receive performance feedback. Be clear about deadlines and deliverables.

Consider very carefully the implications of including people in this process who do not report to you, do not take direction from you, or are not evaluated by you.

Your goal is to provide your staff with a tool that reduces interference and allows them to focus on a clear goal, while holding them accountable for their work. *Staff Meeting*, coupled with your direction, will help produce a high performance team.

Remember This...

Don't abandon face-to-face meetings completely. They are still important for:

- Team-building
- Networking
- Conflict resolution

Successful participants of the *Staff Meeting* share the following trainable characteristics:

- **Strong communication skills**, both verbal and written.
- **Ability to initiate dialog**. They don't wait to be asked.
- **Strong work ethic**. They understand what needs to be done, and are able to stay on task through completion.
- **Able to cope with technology.** The occasional printer or computer problem, etc. should not cause frustration on the part of team members.

Set Expectations

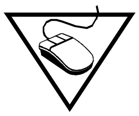
Team members can agree in advance to guidelines for contributing to the *Staff Meeting.*

Members should:

1. Follow norms and guidelines.
   - Formal or informal
   - Frequency of participation
   - Confidentiality
   - Response time expected
2. Use strong writing skills.
3. Cope with the technology. Network communication comes with its own challenges which staff members will learn to meet.
4. Make up for lack of body language. Let people know how you are feeling.
   - Use “emoticons” to clarify when you are using humor or are confused.
   - Be careful with irony and sarcasm. They often come across as open hostility online.
   - Communicate with others as you would have them communicate with you.
   - Write with others in mind. Reading all that text on the screen can get boring. Use short statements, and enter full descriptions as comments to the short statements.

Set Up Author Tags

If you have your Staff Meeting set up by topic heading rather than by staff member name, it may be helpful to configure *GroupSystems* to automatically add a person's name or subgroup identification after their comment. This will help the team to identify who placed a comment and to whom requests for clarification should be addressed.

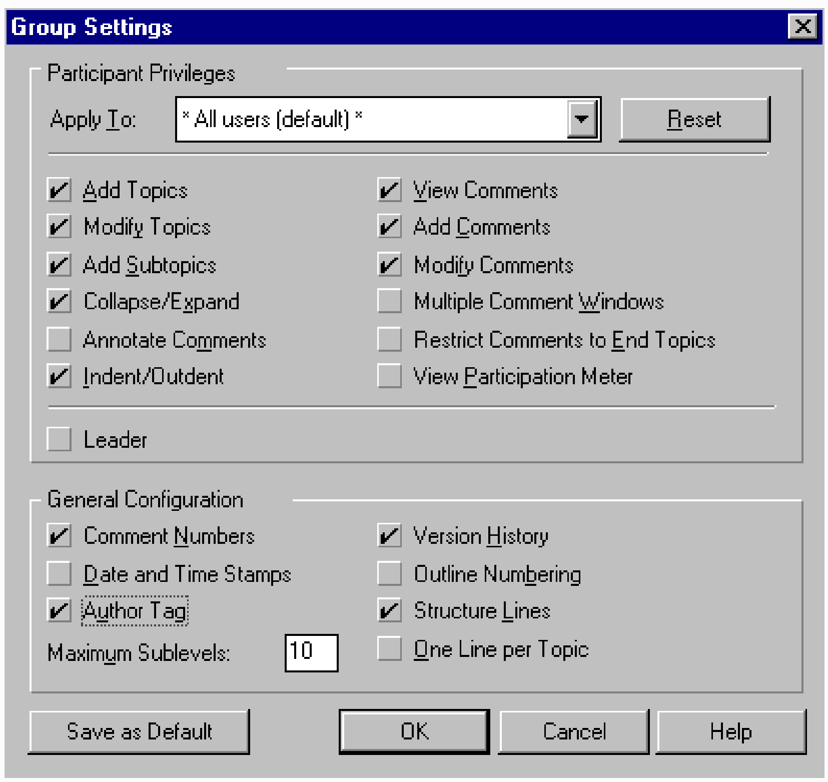


Do This...

1. Double-click to open the Staff Meeting for which you would like to assign subgroup identification (author tags).

2. From the Agenda, click the **Group Settings** button. 

3. On the lower portion of the **Group Settings** dialog, select **Author Tag.**



4. Click **OK.**

Section VI

Resources

Staff Meetings
for Workgroups

Steps

- ❑ Additional *GroupSystems* Tools and Resources
- ❑ Bibliography
- ❑ Author Biography and Acknowledgments
- ❑ Electronic Meeting Feedback Questionnaire

Additional GroupSystems Tools and Resources

As you become more familiar with *GroupSystems*, you will want to utilize it for more than just staff meetings. See the chart below for an overview of the tools that are included in *GroupSystems* Professional Suite.

For help with these tools and resources, use the *GroupSystems* Help command, contact your *GroupSystems* administrator, or contact Ventana Corporation at (800) 368-6338.

Tool Name	Characteristics	Sample Activities	Comparisons
Topic Commenter	Encourages a group to provide depth and detail on a small set of topics.	• Explore task areas for a new plan. • Discuss strengths and weaknesses of a policy. • Conduct focus group research.	• More focused than Electronic Brainstorming. • Less structured than Categorizer.
Categorizer	Used for categorizing ideas and generating single or multiple lists.	• Organize information on a competitor. • List new technologies suitable for further investigation. • Perform a cause and effect analysis. • Organize data from another tool.	• More structured than Electronic Brainstorming. • More powerful than Topic Commenter.
Vote	Provides a quick snapshot of group consensus. Used to evaluate, make decisions, and/or build consensus.	• Rank new product characteristics. • Prioritize objectives. • Indicate the extent of agreement with a company policy. • Select the top three lending agencies.	• More detailed and analytical than the Opinion Meter resource. • Allows cumulative voting (several votes per login).
Group Outliner	Used to generate and/or organize ideas into familiar hierarchical structure.	• Draft a company business plan. • Outline a grant proposal. • Organize a marketing campaign.	• More highly structured than Electronic Brainstorming or Categorizer.

Tool Name	Characteristics	Sample Activities	Comparisons
Electronic Brainstorming	Encourages a team to diverge from customary thinking patterns in search of new ideas.	• Explore how to gain market share. • Discuss our most important product or service. • Share what is feasible for your department to accomplish this year.	• More breadth than Topic Commenter or Categorizer. • Provides keywords / synonyms for grouping items.
Alternative Analysis	Used to evaluate alternatives based on multiple criteria.	• Evaluate job candidates on different skills. • Rate vendors on a number of different requirements.	• Allows for multi-criteria evaluation. • Provides more tabular and graphical results than Vote.
Survey	Used to build, distribute, and collect survey forms.	• Conduct focus group research. • Gather feedback on employee benefits. • Assess customer needs.	• Allows you to combine evaluative methods (e.g., 10-Point Scale, Yes / No, Open-ended). • Includes a stand-alone version for collecting data outside of *GroupSystems*. • Distribute *GroupSystems* survey through a web site.
Activity Modeler	• Used to describe a business process verbally and graphically in a collaborative IDEF0 diagram • Includes activity based costing	• People from different areas in an organization can create accurate business models	• More graphical than Group Outliner—graphical engine draws process in terms of activities and the connections (ICOMs).

Note: Topic Commenter and Survey offer increased flexibility through the use of the *GroupSystems* Palm Add-in for the Palm Organizer (“*GroupSystems* Unplugged”).

Staff Meetings for Workgroups Bibliography

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To purchase these titles or to learn about other available resources, visit Ventana Corporation’s online bookstore at:

http://www.ventana.com/html/bookstore.html

Author Biography

Mike Simons is a Facilitation and Education Specialist for the Professional Services Department of Ventana Corporation. Mike has ten years experience as a software trainer. Since 1997 Mike has taught, facilitated, and operated *GroupSystems®* software in collaborative strategic planning, problem solving, and other types of sessions. Mike is the author of the Ventana Solution Series' *Cause & Effect for Workgroups.* His work has also appeared in *The Facilitator* and "Share a Method: A Collection of Methods and Techniques Shared by IAF Conference Participants." He can be reached at *simons@ventana.com*.

Acknowledgments

To Robert O. Briggs, Ph.D., of the University of Arizona, the initial developer of this concept. Additional thanks for his insights on group dynamics and assisting people in their adaptation to new technology.

To Caitlin Gannon, for editing the details and designing the layout for this document.

To Judy Thompson, Ron Petersen and all of Ventana Corporation's Professional Services Department for implementing and using this pain-relieving process.

Electronic Meeting Feedback Questionnaire

1. Participant Background

What did you hope to produce in today's meeting?

2. Interest Accommodation	**1**	**3**	**5**
Today, my interests were...	not accommodated		accommodated
Thinking about what I needed from this meeting...	I did not get it		I got it
The outcome of today's activities...	does not meet my personal needs		meets my personal needs

3. Process Satisfaction	**1**	**3**	**5**
The meeting methods we used today...	did not meet my expectations		met my expectations
Today's meeting process was...	inadequate to meet our goals		adequate to meet our goals
The group used its time well, devoting enough attention to the important issues.	disagree		agree

4. Product Satisfaction	**1**	**3**	**5**
The product of this meeting...	did not meet my expectations		met my expectations
The outcome of today's meeting is...	unsatisfactory		satisfactory
The results of today's meeting are...	inadequate		adequate

5. Cultural Meeting Background	1	3	5
I felt more comfortable in this electronic meeting than in most other meetings.	disagree		agree
The tools and methods we used today would adequately support my usual meetings.	disagree		agree
Thinking about the tools and methods we used today...	I prefer other tools and methods		I prefer today's tools and methods

6. Other	1	3	5
Did the facilitator / moderator have sufficient knowledge of the issue at hand to moderate the process well?	insufficient		sufficient
The influence of the facilitator / moderator on the meeting process was...	negative		positive

7. Do you have any other remarks?

8. Please describe what you think will be the impact of this meeting.