Behavior Analysis in Practice (2019) 12:696–708
https://doi.org/10.1007/s40617-019-00330-z

DISCUSSION AND REVIEW PAPER

Planning and Leading Effective Meetings

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Published online: 28 January 2019

Abstract
Behavior analysts spend a great deal of time in meetings regardless of their specific professional role (e.g., academic, practice, administration), so effective meeting skills are important. Meetings can serve a variety of important purposes if they are planned and led well. However, many people are not explicitly taught how to plan or lead meetings effectively. The purpose of this paper is to describe the common purposes of meetings and to provide recommendations and tools for planning and leading effective meetings.

Keywords Agenda · Meeting · Meeting facilitation · Meeting planning · Meeting effectiveness · Professional skills

Planning and Leading Effective Meetings

Meetings are one of the most commonly occurring workplace experiences. The Organization for Economic Cooperation and Development (OECD, 2017) surveyed companies with 500 or more employees, and respondents reported that 17% of their time was spent in meetings (Workfront, 2017–2018). Surveys specific to helping professions reported approximately 47% of the workday is being spent in meetings (U.S. Bureau of Labor Statistics, 2017). It is not unreasonable to assume that behavior analysts spend a similar amount of time in meetings with clients, families, students, supervisors, and colleagues, though no studies have specifically examined meetings in our field. Hindle (1998) defines a meeting as two or more people coming together at a prearranged time and place to resolve problems or make decisions. Formal meetings are held at definite times, at definite places, and usually for definite durations to follow an agreed-upon agenda (Meeting, n.d.). Informal meetings might occur almost anywhere and usually do not have an explicit planned agenda.

Meetings, particularly formal ones, require an investment of time and money in the form of person-hours (Hindle, 1998). For example, a meeting with 10 people participating for 1 h has a cost of 10 person-hours (Fried, 2010, 10:55). However, a well-planned and well-executed meeting (i.e., an effective meeting) can generate a return on the meeting time investment. Meetings can offer behavior analysts a platform for generating ideas, detecting and solving problems, assigning tasks, communicating and seeking consultation, generating work products, monitoring performance, shaping a supervisee's professional repertoire, and enhancing interpersonal relationships (Hindle, 1998; Hood, 2013; Sellers, Valentino, & LeBlanc, 2016).

Unfortunately, many meetings are perceived as a waste of time or an unpleasant experience. The OECD (2017) survey indicated that the most common barrier to productivity was "wasteful" meetings (57% of respondents). The ubiquity of bad meetings is suggested in at least two frequently watched TED talks (Fried, 2010; Grady, 2013) and a seminal leadership book called *Death by Meeting* (Lencioni, 2004). Fried (2010) describes meetings as "toxic, terrible, poisonous things" that interrupt worker productivity (9:48). Grady (2013) describes the source of modern worker misery as "a global epidemic of bad, inefficient, overcrowded meetings that is plaguing the world's businesses" (1:37). A preponderance of ineffective meetings can have detrimental effects on general employee performance, job satisfaction, attendance at meetings, behavior during meetings, and the outcomes achieved in those meetings (Bennett, 1998; Rogelberg, Leach, Warr, & Burnfield, 2006).

Leach, Rogelberg, Warr, and Burnfield (2009) identified five design characteristics that impact the perception of a meeting as "good" (i.e., these are present) or "bad" (i.e., these are absent): (a) use of an agenda, (b) keeping of minutes, (c)

This article is not an official position of the Behavior Analyst Certification Board.

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punctuality, (d) appropriate meeting environment, and (e) having a meeting leader. Studies in organizational behavior management on goal setting, task clarification, and performance feedback are directly relevant to these characteristics of meetings and have been found to improve employee performance in a variety of employment settings (Alvero, Bucklin, & Austin, 2001; Slowiak, Madden, & Mathews, 2006; So, Lee, & Oah, 2013; Tittelbach, Deangelis, Sturmey, & Alvero, 2007; Wiesman, 2006). Thus, behavior-analytic researchers are examining the strategies that can make meetings effective, and practicing behavior analysts can use this information to enhance the effectiveness of their meetings.

Fried (2010) suggested that one should combat the detrimental effects of meetings by having fewer meetings (e.g., "If you do have a meeting coming up, if you have the power, just cancel it. .. Everything will be just fine."; 14:18). However, it is not possible nor desirable for a behavior analyst to cancel all meetings. Many of the meetings in which behavior analysts are engaged (e.g., supervision, treatment implementation, parent collaboration and training, case coordination, behavior program training, individual education plan development, classes, research) are necessary and valuable. These interactions offer many of our best opportunities to effect meaningful change for our clients and supervisees. Lencioni (2004) indicated that "there is nothing inherent about meetings that makes them bad, so it is entirely possible to transform them into compelling, productive, and fun activities" (p. 221). The difference between an ineffective meeting and a productive, fun meeting is in the behavior of those planning and leading the meetings.

The planning of the meeting is the responsibility of the meeting leader, whereas conducting the meeting requires effective performance of both the leader (e.g., managing the agenda, providing prompts and consequences for behavior) and the participants (e.g., contributing productively, staying on task). The traditional management literature offers many resources that could help behavior analysts develop their professional repertoires for planning and leading meetings; however, many behavior analysts are not familiar with this literature. The purpose of this paper is to summarize the literature and provide strategies for behavior analysts to plan and lead effective meetings.

The Purposes of Meetings

Because meetings are costly in terms of time and potential disruption to productivity, before initiating the meeting, the meeting organizer must always ask, "Do I really need a meeting?" The purpose of the meeting refers to the explicit goals (i.e., desired outcomes and planned actions) of the meeting (Hood, 2013). The purpose should be clearly reflected in the invitation and on the agenda and should inform the structure of the meeting. For example, the meeting leader might want to review the progress of a project and establish the remaining task list for project completion. The meeting leader might inform the participants about that purpose and specify the following agenda items and responsibilities: report on progress (Participant 1), report on progress (Participant 2), and identification of remaining tasks and necessary resources (all).

The meeting leader may also have unstated meeting purposes (i.e., not on the public agenda), such as increasing motivation to complete a task (i.e., a deadline), observing interactions, or providing feedback. If the meeting leader does not pay attention to these unstated purposes, negative outcomes may include (a) having too many meetings; (b) having too many, too few, or the wrong people in meetings; or (c) missed opportunities to teach. These negative outcomes may have additional undesirable impacts on the meeting participants and the overall organization (e.g., unproductive time, uncomfortable interactions with coworkers; Leach et al., 2009). Appendix A includes a checklist that will help track all meeting purposes.

Most meetings have one or more of the following purposes: supervision and performance management, communication, problem solving, and project management and product generation (Perkins, 2009). These meetings may occur on different schedules with varying numbers of attendees. For example, a behavior analyst may hold a supervision meeting weekly or biweekly and it may only include two people. A communication or training meeting may occur monthly or quarterly with all staff. A project management meeting might be scheduled as needed based on the deadline for the project and the time required to complete assigned tasks.

Supervision and Performance Management

Supervision and performance management typically occurs in private, individual meetings to protect client confidentiality and supervisee privacy. These meetings should occur regularly to facilitate a strong supervisor–supervisee relationship (Sellers et al., 2016) and to accomplish several purposes: setting performance expectations, monitoring performance, shaping professional and technical repertoires, generating ideas, developing and reviewing products, and establishing and maintaining rapport and interpersonal relationships. Data in a recent report from the Behavior Analyst Certification Board® (BACB) show that the most commonly reported type of ethical violation against BACB certificants in 2016 and 2017 was improper or inadequate supervision or delegation of supervision (BACB, 2018a). Thus, behavior analysts might benefit from evaluating their supervision and performance management meetings, devoting time to planning these meetings, and teaching their supervisees (i.e., the supervisors of tomorrow) how to plan and lead effective meetings.

Recommendations for individual supervision and group supervision meetings are available in a special section of this journal (Sellers et al., 2016; Valentino, Sellers, & LeBlanc, 2016). For example, Sellers et al. (2016) recommend that supervisors teach supervisees to develop and submit a supervision meeting agenda at least 24 h in advance of each meeting. This task requires that the supervisee reflect on the items that are relevant to his or her training goals. The supervisor then provides feedback on the agenda (e.g., reordering the items according to priority, changing the number of items to ensure that each can be covered) and adds items related to his or her additional goals for the meeting (e.g., assessing understanding of a concept, assessing whether the supervisee feels comfortable with an upcoming discussion with a parent). This exercise provides goal-setting, rehearsal, and feedback opportunities for the supervisee on agenda development and may improve the outcomes of the supervision meeting.

Communication

Behavior analysts can use meetings to communicate information to multiple people through announcements, progress updates, training in new intervention changes, or in-depth discussion. If the same communication can be quickly, easily, and effectively shared via e-mail, then an e-mail is preferable to a meeting. However, communications that are lengthy, detailed, or complicated (i.e., an e-mail that is more than 50–125 words) are better suited to a meeting (Kruger, Epley, Parker, & Zhi-Wen, 2005; LaFrance, 2016). Although e-mail is often an efficient means of communication, most people tend to overestimate the effectiveness of their e-mail communication (Kruger et al., 2005). Communications about changes in programming should always be accompanied by training in the new procedures using an evidence-based model such as behavioral skills training (Parsons, Rollyson, & Reid, 2012).

Communication meetings that occur prior to a decision allow the leader to gather information from multiple stakeholders to inform the decision (Perkins, 2009). Discussions about topics that are controversial or emotional (e.g., organizational change, upcoming changes in services) are generally handled in person with a carefully planned delivery of the message. The dynamic characteristics of real-time interactions in a meeting allow a prepared leader to directly observe and respond to the reactions of others. Meetings are well suited for providing nuanced answers to complex questions, because the meeting leader, who is in the role of public speaker, has an opportunity to observe responses, to ascertain whether the listener understands the communication (e.g., pause and allow questions, clarify information, monitor for indications of understanding), and to adjust the content as needed (Friman, 2014).

Problem Solving

Meetings are often used to engage in problem solving (Perkins, 2009). The problem may be a chronic inefficiency or an acute emergency. The latter is, unfortunately, the more common precipitating event for short-notice meetings. If an acute emergency occurs and a solution is not readily apparent (e.g., no pertinent policy or procedure), people may be called together at short notice to discuss the problem and potential actions. A short-notice meeting may be the best course of action under rare circumstances where a problem will result in a negative impact if it is not addressed quickly. However, short-notice meetings are stress producing because they often occur without sufficient planning and they interrupt attendee productivity (Fried, 2010). Instead of short-notice meetings, consider contacting key personnel individually to assist with an immediate response and to begin preparing for a future meeting.

Certain steps of a structured problem-solving process are better suited to meetings than other steps. The earliest steps of a structured problem-solving process involve functional assessment in the form of identification and analysis of the problem (i.e., define the problem, identify the variables that have contributed to this problem; Algozzine, Newton, Horner, Todd, & Algozzine, 2012; Anderson, 1994). These steps typically involve information gathering and reflection that should occur prior to a meeting so that the group can discuss the results of these functional assessment steps in the meeting. Behavior analysts have a wide array of appropriate functional assessment tools pertinent to clinical services (e.g., experimental functional analysis, interview) and to organizational and performance problems (e.g., total performance system analysis; Brethower, 1982; Performance Diagnostic Checklist–Human Services; Carr, Wilder, Majdalany, Mathisen, & Strain, 2013). The goal is to complete the information-gathering part of the functional assessment process prior to the meeting.

The next steps of the problem-solving process, brainstorming potential solutions and careful analysis of advantages and disadvantages, are well suited to a meeting (Algozzine et al., 2012; Perkins, 2009). A brainstorming session is generally enhanced by having multiple active participants and a leader who records and organizes ideas, reinforces solution generation from participants, and deters evaluative comments during the idea-generation process. Similarly, meetings can be a good option for conducting a comprehensive analysis of the advantages and disadvantages of the available ideas. For example, the treatment selection model presented by Geiger, Carr, and LeBlanc (2010) could be conducted with a parent or teacher in a collaborative meeting where the behavior analyst and implementer review the pros and cons of each evidence-based option and select one together. One person attempting the analysis alone is likely to miss advantages or disadvantages that others might detect, resulting in an incomplete analysis.

Final steps in the problem-solving process include implementing and evaluating the identified solution (Algozzine et al., 2012). This typically requires involving at least a few people with the appropriate authority and knowledge pertinent to the implementation and evaluation. Implementation often takes precedence over evaluation of the impact of the solution, but both are equally important. Evaluation of the solution requires a discussion of the behaviors and outcomes that might be expected to change (e.g., client problem behavior, customer service response time) as an indicator of whether the solution has been effective. A full evaluation of the impact of the solution typically occurs weeks to months after the original issue. Thus, it is important to schedule follow-up evaluation meetings at the end of the implementation-planning meeting to ensure that this critical step is not forgotten.

Project Management and Product Generation

Some projects benefit from collaboration over an extended period of time. Activities such as conducting research studies, synthesizing a literature, or creating practice guidelines may prove difficult to accomplish alone. In these cases, the meetings can serve multiple purposes (e.g., motivation by deadline, social reinforcement, assessment of social dynamics, practice of desirable repertoires, modeling professional behavior, speaker functioning as listener). For example, if the project leader suspects competitive tension or dysfunctional interactions between two project participants, he or she might (a) assess this during progress reports (e.g., Do they listen to each other? Do they provide praise? Do they blame each other?), (b) model appropriate conflict resolution, and (c) distribute sufficient reinforcers to suppress competition.

Although a common recommendation from nonbehavioral sources is to limit meetings to 1 h (Williams, 2012), effective project management and product-generation meetings may require longer than 1 h. A longer meeting may create the opportunity for in-depth discussion, brainstorming, or extensive feedback and editing of a product. Project management meetings typically require each participant to prepare in advance (e.g., draft text, prepare graphs) and to present succinctly on his or her activities during the meeting, making it critical that the meeting leader provide reminders about the deadline and manage the meeting time carefully.

In summary, there are many valuable purposes of meetings and the negative reputation that meetings have is likely a product of too many poorly planned and executed meetings (Lencioni, 2004). The recipe for an effective meeting begins with a careful analysis of its purposes, followed by careful planning and leadership of the meeting. The following recommendations are provided to assist behavior analysts in developing fluency in planning and leading effective meetings and to be a resource to help them teach their supervisees to do the same. Expert meeting leaders may already use these strategies but might still benefit from the structure and resources when they teach their supervisees meeting skills. Some meetings will not require all of the recommended strategies, but each strategy will likely prove useful in at least one type of meeting.

Planning and Leading Effective Meetings

Planning the Meeting

The greatest meeting cost is usually associated with each participant's time (Hindle, 1998; Hood, 2013). Participating in a poorly planned meeting wastes time, often results in lower attendance at future meetings, and may lead to off-task behavior in meetings. Appendix A provides a checklist that can assist with meeting-planning activities.

Agenda Development Leach et al. (2009) reported that a written agenda and completion of all planned agenda items during the meeting are two design characteristics that participants report influence the perception of a meeting as a good meeting. The agenda is the planning tool that facilitates time management during the meeting and enables participants to prepare for the meeting and contribute more effectively. The agenda usually includes a summary of the purpose of the meeting, each task associated with the meeting goal, and a time estimate for completion of each task. Meeting agendas often also include the names of participants and the location and time of the meeting. Appendix B provides a template for creating a meeting agenda that includes these important elements and allows the notetaker to record comments.

The meeting leader often develops a preliminary agenda based on the purposes of the meeting and seeks input on the agenda from the attendees. It should not take long to develop the initial agenda, but identifying the agenda items, appropriately ordering the items, and estimating the duration for each item allow the meeting leader to determine if the items can all be accomplished in one meeting. The order of the agenda items should follow the likely flow of discussion and the priority of the items. For example, a critical decision that requires discussion might occur at the beginning of the agenda to ensure that there is sufficient time to reach a decision. Agenda items may also be ordered according to the times that critical participants are available if the participants can only attend for part of the meeting. The agenda may be revised throughout the other stages of planning activities as necessary.

Participants Meetings are more effective and cost-efficient when invitations are limited to participants who have a contribution to make to agenda items, who will be engaged in the content, and who will be responsive to performance feedback (Ludwig & Frazier, 2012). Unnecessary meeting participants often have a detrimental impact on the meeting by participating less, engaging in off-task behavior, and establishing nonparticipation as an acceptable behavior pattern. Behavior analysts can use the preliminary agenda to identify the participants needed to complete each agenda item. When participants in a group meeting are only needed for a small portion of the agenda, consider providing them the option of attending the relevant portion of the meeting and then leaving.

Some participants may be considered critical because the outcomes of the meeting cannot be accomplished if they are not present (e.g., a decision cannot be made without the decision maker). Contact critical participants individually and share the importance of their participation in the meeting to ensure they will prioritize attending. When optional participants are invited to a meeting for training purposes (e.g., a person who is observing a brainstorm for the first time), the meeting leader could list them as observers on the agenda and assign them activities such as timekeeping or note-taking to assist with the management of the meeting.

Environment and Equipment Decisions about the environment and equipment primarily serve to minimize the negative impact of these variables on group meetings. That is, an uncomfortable environment (e.g., hot or cold temperature, crowded seating, noise) and malfunctioning equipment (e.g., poor Internet connectivity, broken projector) can lessen the effectiveness of a meeting (Hood, 2013) even if the agenda was otherwise well planned. For example, a noisy meeting space may limit interactions, and a room that is too hot, too cold, or dimly lit may make participants less alert. Poor Internet connectivity may hinder the quality of supervision that is being provided remotely.

Determine the meeting format (e.g., online, in person, phone) based on the purpose of the meeting and the logistics for attending. If all participants are in the same location, an in-person meeting is generally preferred because of the opportunity for dynamic engagement. However, if the purpose of the meeting is to edit a document, it may work well to use an online platform that allows screen sharing and control (Schwarz, 2017). Remote participation is not recommended when the purpose of the meeting is directly observing participants' interpersonal skills or discussing sensitive issues that may produce a strong emotional reaction. It is particularly challenging to plan a meeting that includes some participants who attend in person and others who join remotely. When most participants are in person in the same location, remote participants may have a worse meeting experience and more limited opportunities to participate. The in-person attendees may forget about the remote attendee unless there is a projected image of that person's camera. Similarly, a brainstorming activity conducted on a conference room whiteboard would be difficult for online participants to view even if a camera were focused on it. However, a meeting that contains only discussion-based content or includes materials that could be electronically shared in advance of the meeting or on a shared computer screen could be appropriate for this format.

If an online meeting format is selected, be prepared for technical issues (e.g., connectivity, audio, log-in failures) and give all participants a chance to become familiar with the technology and skilled at troubleshooting common problems (e.g., muting microphones, connectivity issues; Schwarz, 2017). It is also useful to have the meeting leader or another designated person log in to the meeting early to help participants troubleshoot technology barriers. Encourage participants to use a webcam so that their participation and responses to others' actions are accessible to those in the meeting. Online meetings can also be enhanced by displaying the meeting agenda, notes, and materials that are going to be reviewed in the meeting.

Schedule Meetings can interrupt other productivity unless they are scheduled carefully to avoid certain periods of the day (Hood, 2013). Organizations may designate certain times for group meetings (e.g., 8 to 9 a.m., 11 a.m. to noon) to minimize interference with the primary activity of the organization (e.g., seeing clients, creating products) and to avoid ebbs in the natural physiological cycle of lowered alertness (e.g., midafternoon; Grady, 2013). It is also important to schedule meetings to allow time for participants to transition to other activities (e.g., a 1-h meeting should have no more than 50 min of content). If a meeting is perceived as disrupting or delaying other productive activities, the meeting will become an aversive event. If the meeting provides a convenient break between other tasks and is productive, pleasant, and engaging, the meeting might become a preferred event. Finally, when planning a meeting with multiple attendees, electronic scheduling tools (e.g., Outlook, iCal, Doodle) provide a convenient way to coordinate schedules (DuPont, 2017).

Premeeting Communication Sharing information with participants in advance of a meeting can substantially improve the effectiveness of the meeting. These communications can (a) prompt meeting preparation activities, (b) facilitate information gathering and distribution, (c) alter performance of a meeting participant, or (d) clarify roles and tasks. Bailey and Burch (2010) recommend sharing an agenda at least 24 h in advance of the meeting. Fienup, Luiselli, Joy, Smyth, and Stein (2013) found that an e-mail reminder about the upcoming meeting produced an increase in timely attendance. The meeting leader can distribute the final agenda and include the time, location, and other necessary instructions (e.g., online meeting link), even if these details have already been provided in another format (e.g., calendar invitation).

In addition to sharing the agenda, the meeting leader might also remind attendees of the rules of effective collaboration during the meeting. See Appendix C for a sample meeting rules handout that clarifies the meeting tasks and sets expectations for behavior in meetings (e.g., arrive on time, put away phones and engage in the meeting) and interpersonal dynamics with other participants (e.g., do not interrupt others). After meetings, the meeting leader can provide feedback about performance in relation to the expectations, which has been shown to impact performance in the organizational behavior management literature (Durgin, Mahoney, Cox, Weetjens, & Poling, 2014). If participants have not collaborated well with each other in the past, set expectations for respectful, collaborative efforts in the upcoming meeting (e.g., no complaining or accusatory comments, minimize off-topic participation). The roles for the upcoming meeting (e.g., notetaker, presenter) might be designated or clarified.

Leading the Meeting

The act of leading a meeting shares many features with public speaking, making Pat Friman's (2014) recommendations about the "front of the room" pertinent (p. 109). Friman (2014) recommends repeatedly practicing a presentation. It is not feasible to rehearse an entire meeting, but certain components of the meeting (e.g., opening, closing, introducing a sensitive agenda item) will benefit from practice. The primary tasks of leading a meeting (i.e., opening the meeting, managing the meeting, and closing the meeting) are covered in the following sections. The leader's job is to make it easy for the participants to contribute effectively. Appendix A includes a meeting evaluation checklist that can be used after the meeting has concluded by the meeting organizer or leader to determine any elements of the meeting that did not occur as planned.

Opening the Meeting Rules and contingencies established in the first 2–10 min of a meeting (i.e., the opening, approximately 10% of total meeting time) may determine the outcomes of the meeting. The most important part of opening a meeting is starting the meeting on time (Davis, 2013). Starting on time conveys value and appreciation for the attendees' time, particularly those who arrived on time. The meeting leader may make a statement at the beginning of the meeting (e.g., "Thank you for prioritizing this meeting and arriving on time.") to differentially reinforce timely attendance. If the start of the meeting has been delayed to accommodate late arrivals, those who arrived on time have to wait (i.e., an aversive experience), which may punish their promptness. See Appendix C, Item 2, about the behavior of those who arrive late (e.g., enter silently with no apologies or excuses).

The meeting leader can open group meetings with a welcome statement and remind attendees about the rules of the meeting (e.g., put away personal devices and turn off alerts, be respectful when others are speaking) and basic logistics (e.g., how to mute audio, how to use the chat function). Next, the leader can provide a summary of the purpose, agenda items, and specific roles if applicable. The leader might ask for agenda modifications and shift the agenda accordingly if possible (e.g., the new item cannot be added, a prior item is removed, the order of items is adjusted). Introductions are appropriate when the participants do not regularly work together or when there is a new participant joining the group. If participants introduce themselves, the leader should allot more time on the agenda and model his or her own brief, concise introduction. If rapport or relationship building is a purpose of the meeting, more time could be allotted to this task and an icebreaker activity could be included (Heathfield, 2018; Miller, 2008; Ray, 2018; West, 1999).

Managing the Meeting After opening the meeting, the leader will manage time and interpersonal dynamics to minimize delays and troublesome behaviors (Davis, 2013; Eaton, 2011). See Table 1 for common problems and strategies for managing them. Prompting and differential reinforcement are the primary strategies for managing time and progress on the agenda. The meeting leader might provide feedback and reinforce relevant, productive contributions in subtle (e.g., head nods, thumbs-up) or direct ways (e.g., "That was a great contribution."; Alvero et al., 2001). The meeting leader can explicitly redirect off-task or argumentative comments (Davis, 2013). In addition, the meeting leader can provide periodic reminders of progress on the agenda (e.g., "We are ahead of schedule.") before proceeding to the next item. The meeting leader can arrange seating to allow for monitoring of signs that a participant has a comment (e.g., changed posture, changed facial expression, a raised hand or finger) and prompt participation when there is an opportunity. At each new agenda item, the meeting leader might invite discussion from participants who have a known contribution to make (e.g., "Joe, you had an idea about this. Could you start off our discussion on this one?"). Finally, meeting leaders can focus the discussion of a topic by using open-ended questions to lead the discussion in a specific direction (e.g., "Can anyone think of any disadvantages?"; Eaton, 2011).

The meeting leader may need to manage tense interpersonal dynamics and problem behavior during the meeting (Davis, 2013; Eaton, 2011). Lively, respectful discussion and disagreement should be encouraged and facilitated, even though disagreement sometimes increases tension. A skillful leader can relieve tension with humor and establish a culture of mutual respect, integrity, and civility (Perkins, 2009). See Table 1 for recommended strategies and suggested language for each common problem. If there is a known problematic interaction, the seating might be arranged to place those likely to engage in combative behavior near the meeting leader and apart from each other. Participants with a history of sidebar conversations or off-task behavior can also be encouraged to sit near the meeting leader.

Some problem behavior, including off-task behavior (e.g., checking phone, engaging in other tasks), dominating conversations, and vague or unclear contributions, can be handled with a brief, polite redirection (e.g., "Let's hear from someone else this time.") or request for clarification (e.g., "I am not sure I understand. Did you mean. ..? "; Davis, 2013). A participant who is off task can be prompted to provide input at times that he or she is engaged in the off-task behavior (e.g., "Do you have any thoughts on this agenda item?"). A participant who dominates conversations may be politely interrupted by the meeting leader (e.g., "Could I ask you to hold that thought for a moment?"), and subsequently the meeting leader may prompt another participant to provide his or her input. Participants who make vague or unclear contributions might be asked a clarifying question (e.g., "Just to make sure I

Table 1 Common meeting problems and suggested strategies

Common problem	Suggested strategies	Suggested language
Interruptions	• Establish ground rules for respecting other meeting participants' opportunities to contribute. • Ask interrupters to hold their comments. • Provide postmeeting private feedback.	• "Could you hold that thought for a moment?" • "Let's come back to that later in the meeting."
Distractions	• Instruct participants to turn off personal devices and notifications at the beginning of the meeting. • Politely ask the participant who is the source of the distraction to stop. • Pause the meeting for a brief break and privately ask the distracting participant to leave the meeting.	• "That ring tone definitely gets your attention. Could you silence it for now?" • "Could I ask you to close your e-mail for the rest of the meeting? I don't want to miss out on the opportunity to get your input."
Off-task behavior	• Redirect the off-task behavior by providing a relevant participation opportunity. • Politely ask the person to stop the off-task behavior. • Pause the meeting for a brief break and privately ask the distracting participant to leave the meeting.	• "Do you have any thoughts on this agenda item?" • "Let's minimize side conversations. Share your idea with all of us if it is relevant to the agenda." • In private discussion, "I am sorry, but I think the repeated distractions are holding up our progress in the meeting. Do you think this might not be the right time for you to be in the meeting?" (Whereas a peer may present this as a question, a supervisor might use the more directive version, "I think this might not be the right time for you to be in the meeting.")
Interpersonal conflict or combative responses	• Arrange seating to focus eye contact on the meeting leader and to increase distance between participants who have conflictual interactions. • Establish ground rules for expected behavior during the meeting (e.g., not interrupting, respecting other participants). • Interject before participants have opportunities to respond negatively to one another. • Deliver reinforcement equitably between participants to suppress competitive responding. • If the behavior impacts meeting effectiveness, stop the meeting and discuss the interaction privately with each person.	• "Remember our purpose today and that we have an expectation for everyone to be engaged and respectful throughout the meeting." • "This seems to be getting heated. I am happy you both care so much about this issue, but let's take a break from this discussion for now and return to this hot-button topic later."
Technology	• Test equipment or online meeting platforms prior to the meeting. • Plan for a backup in case of malfunctions or difficulty with the meeting platform. • Create a visual aid that includes critical operating instructions for devices in any frequently used meeting rooms.	• "OK, time for Plan B. Let's use this conference call number instead of the meeting platform."

understood what you said. ..") or asked to restate the comment in another way (Perkins, 2009).

Other types of problem behavior may require more direct interventions (Eaton, 2011). A supervisor will probably feel more comfortable using these strategies than a peer would, but it should be appropriate for anyone to politely address behavior that is disruptive. For example, participants may take the conversation off topic, have sidebar conversations (i.e., a private conversation with another person that occurs in the middle of the group conversation), or make combative or competitive statements toward other participants. The meeting leader might respond by calmly restating a meeting rule (e.g., "Remember that we have all agreed that we will not have sidebar conversations.") or stopping the interaction (e.g., "This seems to be getting heated, so let's take a break from this discussion for now."). The team leader might politely interrupt someone who is derailing discussion (e.g., "That is a good thought, and I would like to come back to that one later, after this agenda item.") and pivot to a participant who was making a relevant point.

The meeting leader is ultimately responsible for managing these behaviors and responding in ways that keep the meeting on track (Eaton, 2011). If misbehavior occurs in multiple meetings or misbehavior by multiple attendees is occurring, something may be off in the planning and conduct of the meeting (e.g., wrong participants, lack of rules, no agenda, lack of consequences for attendees' behavior). If a single person is repeatedly responsible for disrupting the dynamic of the meeting, feedback should occur (Alvero et al., 2001; Balcazar, Hopkins, & Suarez, 1985) and an individual performance management plan might be developed by that person and his or her supervisor. These kinds of problematic behaviors should be addressed politely but directly to minimize the negative impact of the participant's behavior on the meeting dynamic.

Closing the Meeting The close of the meeting is just as important as the opening of the meeting to provide task clarification and summaries (Durgin et al., 2014) and should represent about 10% of the meeting time (e.g., 10:45–10:50 a.m. of an hour-long meeting that begins at 10:00 a.m.). It is important to end by the scheduled time (e.g., 10:50 a.m.), as participants need time to transition to their next commitments (Eaton, 2011), rather than extend into the transition time (e.g., 10:50–11:00 a.m. is allotted for relocation, a brief break, and e-mail triage). The meeting leader or notetaker can summarize the discussion (Perkins, 2009), restate decisions that were made, remind participants of assigned tasks, and recognize those who volunteered for additional responsibilities. If a follow-up meeting is required, schedule the next meeting before dismissing the current meeting.

Documentation of the events of the meeting allows the leader and participants to rely on a written record rather than memory (Eaton, 2011). The meeting notes should be distributed within 24–48 h of the end of the meeting. Comprehensive meeting notes increase the likelihood that ideas are captured and that assigned tasks are clearly linked to a designated person. Written notes may also limit or help resolve any subsequent conflict associated with misremembered events or statements. Designate a person to take notes and check in with that person periodically throughout the meeting to assess his or her comfort with documentation. Adjust the frequency of check-ins with the notetaker depending on the pace of the meeting and the documentation requirements. The meeting leader can improve the efficiency of this task by providing an electronic template for notes. Appendix A provides an example of note-taking and the type of information that might be included. Finally, after all other postmeeting tasks have been completed, evaluate the meeting process to determine if there are any areas that could be improved (see Appendix A). Butler (2015) recommends sending a postmeeting survey to obtain feedback from participants on their meeting experience so that the meeting leader can improve future meetings.

Summary and Conclusions

The BACB reported the demand for behavior analysts in the United States from 2010 to 2017 has increased by 800% (BACB, 2018b). According to the U.S. Bureau of Labor Statistics (2017), meetings possibly comprise almost half (47%) of their workday. These data provide compelling reasons for behavior analysts to focus on improving efficiency in all aspects of their work and particularly in their meetings. Meetings have a reputation as being costly barriers to productivity (OECD, 2017) that are "toxic, terrible, poisonous things" (Fried, 2010, 9:48). This reputation may accurately describe many ineffective, inefficient, overcrowded meetings, but it need not be true of all meetings. The difference between a wasteful event and a productive experience is in the behavior of those who plan, lead, and participate in the meetings (Anderson, 1994; Perkins, 2009).

Ineffective meetings may persist because meeting leaders have not observed any indicators that their meetings are not great or they have not observed any examples of great meetings. Friman (2014) described an overly confident presenter who does not practice his or her presentation skills because the presentations always go well. He pointed out that the speaker is overly controlled by a few reinforcing statements or head nods in the crowd, which lead the speaker to conclude that the presentation was great when, in fact, it was not. A meeting attendee may respond similarly during a meeting (e.g., head nods, smiles) even if a meeting is boring and a waste of time. The result could be that the meeting leader thinks that his or her meetings are effective because of a lack of access to accurate feedback.

Like Friman's (2014) recommendations, the suggestions and resources provided here are designed to support anyone interested in becoming an effective meeting leader, but they are likely to be most useful to those who are new to leadership positions. People are likely to imitate the behaviors they have observed in prior meetings, even if those meetings were ineffective. Thus, it is important to explicitly teach the skills for planning and conducting meetings throughout all levels of an organization. One might train meeting leadership skills by assigning someone specific meeting-related tasks, such as note-taking for a meeting with a small number of attendees. A supervisor could also have a supervisee prepare a meeting agenda and provide feedback prior to distributing it to other participants. The skilled meeting leader should help the leader in training to practice the opening and closing of a meeting. Behavior analysts should share the resources provided here and teach emerging leaders to use the strategies provided in Table 1 and Appendices A, B, and C. Managing problem behavior is one of the most challenging tasks of meeting leadership, so this responsibility should be one of the last ones for which the leader in training assumes responsibility.

Meetings are common activities but have rarely been the focus of empirical studies (Leach et al., 2009; Perkins, 2009) and certainly not specific to the practice of behavior analysts. Some preliminary research could include the assessment of meeting frequency and duration, of meeting purposes, and of the prevalence of meetings that are perceived to be "bad" as described by Grady (2013). Some initial research in this area could lead to the conclusion that behavior analysts are already effective in the areas of planning, leading, and participating in meetings. Alternatively, it could further delineate the characteristics of meetings that should be a focus for training in the future. Although many nonbehavioral disciplines recommend eliminating meetings altogether, behavior analysts are in a position to program antecedents and consequences and evaluate whether these interventions improve meetings.

Compliance with Ethical Standards

Conflict of Interest The authors of this manuscript declare no conflict of interest regarding this manuscript.

Informed Consent Human or animal participants were not employed for this manuscript, so informed consent was not necessary.

Appendix A

Meeting planning, leading, and evaluation checklist

The leader should complete this form during planning and after the meeting occurs.

Planning

Purpose(s): Goals of the meeting *(Select all that apply.)*

☐ Supervision and performance management
☐ Communication
☐ Problem solving
☐ Project management and product generation
☐ Other:

Unstated purposes and strategies:

☐ Setting deadlines
☐ Observing interpersonal interactions
☐ Providing feedback
☐ Modeling interpersonal skills

Frequency

☐ One time
☐ Recurring
☐ Unsure *(Revisit after meeting.)*

Platform, Environment, and Equipment *(Select all that apply.)*

☐ In person
- ☐ Projector
- ☐ Whiteboard
- ☐ Seating configuration
- ☐ Food/beverage (if applicable)
- ☐ Heating/air-conditioning
- ☐ Parking

☐ Online
- ☐ Instructions for meeting access
- ☐ Visual display/editing
- ☐ Participant video requirements
- ☐ Participant audio requirements

☐ Phone/conference call
- ☐ Instructions/requirements for access

Planning Checklist *(If "No/Unsure" is selected, reevaluate that item and determine a solution.)*

Is the meeting necessary?	☐ Yes	☐ No/Unsure
Does each identified participant have a specific contribution?	☐ Yes	☐ No/Unsure
Have critical participants been contacted for scheduling preferences?	☐ Yes	☐ No/Unsure
Has scheduling been considered based on the meeting's purpose and content?	☐ Yes	☐ No/Unsure
Is the meeting environment appropriate?	☐ Yes	☐ No/Unsure
Has the agenda been developed and sent to participants?	☐ Yes	☐ No/Unsure
Has necessary premeeting communication occurred?	☐ Yes	☐ No/Unsure
Have all participants confirmed attendance?	☐ Yes	☐ No/Unsure
Has a reminder e-mail been sent to participants?	☐ Yes	☐ No/Unsure

Leading and Evaluation

Open the Meeting

☐ Review logistics.
☐ Review ground rules.
☐ Provide overview of purpose.
☐ Review agenda.
☐ Give introductions:
- ☐ Self-intro
- ☐ Meeting leader intro

Manage the Meeting

☐ Manage time.
☐ Facilitate discussion.
☐ Manage problem behavior.
☐ Provide praise for appropriate contributions.
☐ Follow and redirect conversation to the agenda when necessary.

Close the Meeting

☐ End on time.
☐ Review decisions.
☐ Review assigned tasks.
☐ Schedule next meeting, if necessary.
☐ Thank participants for their time.

Meeting Evaluation Checklist *(If "No" is selected for any of the following items, identify process changes for future meetings.)*

Did the meeting start on time?	☐ Yes	☐ No
Did all participants attend the meeting?	☐ Yes	☐ No
Did all participants have the materials necessary?	☐ Yes	☐ No
Did all participants remain engaged and participate as expected?	☐ Yes	☐ No
Did someone take notes during the meeting and share them afterward?	☐ Yes	☐ No
Did the meeting end on time with an appropriate closing?	☐ Yes	☐ No

Appendix B

Meeting Agenda and Notes

The meeting leader should share this with participants prior to the meeting and use it as a template for notes.

Meeting Title: *Supervision Meeting*

Time: *Scheduled: 9 a.m. – 10:30 a.m.* *Actual: 9:02 a.m. – 10:25 a.m.* Date: *10/1/2018* Location/Online Link: *Zoom.com.123456789*

Meeting Purpose: *Review agenda items and conduct weekly review of clinical cases*

Meeting Leader: *Supervisor Name* Minutes (Responsible Person): *Supervisee Name*

Attendees: *Supervisor and Supervisee Names*

Agenda

Item/Notes	Responsible Person and Assigned Tasks	Estimated Duration
Review agenda that was developed by supervisee for this meeting and remove or add any necessary items. *Agenda item for review of Case 4 should be removed for this week; client was on vacation with family for the week and services were not provided. No additions to the agenda.*	**Responsible person:** Supervisee **Assigned tasks:** *Revisit review of Case 4 in meeting next week. Add this item to the agenda for next week that is sent to supervisor 24 hr prior to meeting.*	**~ 5 min** *Actual: 10 min*
Review of Case 2. *This case was identified for review because target behavior data are increasing over the past week in certain settings where there may be drift in implementation of the behavior support plan. Supervisee plans to conduct observations in those settings over the next week.*	**Responsible person:** Supervisee **Assigned tasks:** *Supervisee to conduct observations in the settings where target behavior has been increasing and review with supervisor as soon as observations have been completed.*	**~ 30 min** *Actual: 20 min*
~~**Review of Case 4.**~~ *Moved to discussion next week because of insufficient data (client on vacation).*	**Responsible person:** Supervisee **Assigned tasks:** *Move to agenda for next week.*	**~ 15 min** *Actual: 0 min*
Review of Case 7. Behavior technician missing scheduled sessions. *The behavior technician working on this case has missed 2 treatment sessions in the last 2 weeks. Supervisee provided feedback about the missed sessions to the behavior technician two days ago and the behavior technician reported having difficulty with transportation. After discussing this situation in this supervision meeting it has been determined that the technician will no longer be scheduled to provide treatment on this case until the issue is corrected. Role-play sessions were conducted during this supervision meeting for delivering this news to the technician.*	**Responsible person:** Supervisee **Assigned tasks:** *Supervisee will meet with technician tomorrow. Any scheduled sessions will be replaced with one of the other technicians on the case.*	**~ 10 min** *Actual: 25 min*
Closing. Summarize assigned tasks. Touch base on other project deadlines that are upcoming. *All upcoming deadlines are on track for discussion at next meeting.* *Supervision session documented in supervision record.*	**Responsible person:** Supervisee **Assigned tasks:** *Supervisee to develop agenda for next meeting and send within 24 hr.*	**~ 10 min** *Actual: 5 min*

Note. Italicized gray text indicates information that would be added by the notetaker during a meeting.

Appendix C

Rules for Meeting Participation

Participants have responsibilities before and during a meeting, and a highly skilled participant can enhance the value of almost any meeting. The following rules provide guidance for effective meeting participation.

1. **Review the meeting invitation and agenda in advance.**
   - Be sure you know exactly where to go and when to get there.
   - Review any materials or complete any assigned tasks prior to the meeting.
2. **Arrive promptly.**
   - Arrive a few minutes prior to the start of the meeting and be ready to begin at the start time.
   - If you are unexpectedly late for a meeting, enter quietly without interrupting. Well-intended apologies further disrupt the meeting if it has already begun. Apologize for tardiness after the meeting instead.
3. **Eliminate distractions.**
   - Turn off cell phone alerts and ringer and computer notifications prior to entering the meeting.
   - Put away your phone and any materials that are not relevant to the meeting.
4. **Present concisely and consider your audience.**
   - If you present in the meeting, practice what you will say and ensure that you remain within your allotted time.
   - Consider your audience when creating your presentation to ensure that the material is concise and appropriate for the audience.
5. **Actively participate.**
   - Contribute to the discussion when appropriate. Avoid comments that are a repeat of information or points made by others.
   - If you are participating remotely, use the chat feature to alert the meeting leader if you wish to make a comment.
6. **Reinforce the participation of others.**
   - Listen and reinforce the contributions of others with smiles, nods, and praise comments (e.g., “Great idea!”).
7. **Avoid interrupting.**
   - Avoid interrupting others or apologize when it happens inadvertently (i.e., you began speaking at the same time).
   - Do not have side conversations with other participants during the meeting as this serves as a distraction and interrupts the main conversation.
8. **Self-manage participation and interruptions.**
   - Self-monitor the frequency and duration of participation to ensure that you do not over- or underparticipate.
   - Self-monitor interruptions. If you interrupt frequently, use a self-management plan (e.g., write down the idea as a replacement behavior, provide a signal to the meeting leader for a speaking opportunity, collect data, and set a goal for participation).
9. **Volunteer for relevant tasks.**
   - When tasks require volunteers, only volunteer if it is possible for you to complete the task in the time frame expected.
   - If any part of the task is unclear, ask for clarification before committing to the task.

Publisher's Note Springer Nature remains neutral with regard to jurisdictional claims in published maps and institutional affiliations.

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