

Safety Check[®]

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You have heard repeatedly that an agenda is a vital ingredient to a successful meeting. But little is ever heard about safety in meetings – the environmental variable that determines whether people participate or merely observe. How do you measure safety? What actions are available to leaders for creating a safe meeting environment?

He is wearing his traditional garb: dark suit, white button-down shirt, red tie, and black tasseled shoes. The glare off his wire-rimmed glasses makes it difficult to see those steely blue eyes. Harry Fox has all the right moves, and his quick climb up the management ladder proves it. He is arrogant and ruthless. People who oppose his ideas pay a price. And the payment is extracted when they can least afford it.

We are both participating in a problem-solving meeting. Well, that is not quite true: I am observing and Harry is talking. He just stole the floor from Jim King a few minutes ago by talking louder than Jim. I hate that behavior. Jim looks dejected. Harry continues to dictate his ideas about how the team should solve the problem. I realize that Harry missed three crucial facts, which will cause his solution to fail.

Should I share the facts? Wait a minute. Harry does not like to be corrected. He wants to hear only the facts that support his position. Harry is connected all the way to the top of the company. I am connected to the people on my team. I hesitate. Wow, that is totally uncharacteristic of me: I am known as someone who speaks his mind. I look over at Harry. He has taken his glasses off and is moving them rhythmically up and down as he talks. Although what he is saying does not make sense, it sounds authoritative. I feel my gut twisting. Is it anger? No. It's fear.

Harry concludes his speech. There is a pause. If I want to speak, it's time ... I say nothing.

Safety

The omission of crucial facts and opinions happens in thousands of business meetings every day. If people do not feel

safe, they are not going to say anything. And you will have no idea about what you missed.

Too often the participants who are the most vocal assume that everyone feels as safe as they do. This assumption is wrong more often than not. But it is rarely ever tested.

You can help increase the safety of your meetings. Collect data about conversational safety. Share it. Interpret it. And decide how to respond to it. These actions will open the opportunity to transform your meetings. For instance, you will cre-

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ate the opportunity to discuss and take action on items previously not discussable such as who was or was not invited; what is and is not on the agenda; and how the discussions will or will not be processed. I have experienced the power of this transformation many times. You can too.

Collect the Data

Inform everyone that you will use a secret ballot to poll the participants about their safety to speak freely. Poll people with the following question: “How safe is it for you to fully share your ideas during this meeting?”

Write this question on the board or a flip chart. Clarify that the ballots are not identified, just a number on a slip of paper. Expand on what *fully share* means by listing some controversial ideas that were not shared at other meetings that would have made a difference.

An unsafe environment causes participants to share fewer ideas and to carefully filter the ideas they do share to be sure they are safe. Poll people for the information in Table 1.

Pass out a ballot – a small piece of paper, Post-it Note, or note card – to each participant. Ask everyone to write the number corresponding to their level of safety on the ballot using the numbers zero through four as defined in Table 1. My experience is that some people will, regardless of the instructions, write a decimal number. Simplify things for yourself by informing everyone that all the ballots will be rounded so that the results fit the range of the gradient.

Ask them to cup the ballot in their hand when writing the number so that no other participant can see their rating. Stress to everyone that you do not want anyone to share their rating with anyone else, regardless of how safe they personally feel. Again, emphasize that only you will see their ratings. Have the participants fold the ballot in half and place it in a container, such as a hat.

Share the Data

Ask a participant to help you build a histogram of the poll. I suggest that you use a flipchart so there is a hard copy of the histogram to use when you write up the minutes of the meeting. Pull each ballot out of the container one-by-one and read the score to the person building the histogram. Stuff the recorded ballot into one of your pockets or put them in your briefcase so no one else can or will ever see them. Note that you are not only revealing how safe people feel – you are also building safety by checking numbers in a way that reinforces safety.

Table 2 shows an actual histogram

Table 1: *A Safety Gradient*

Level	Description	Comment
4	Secure	Everything is discussable without filtering.
3	Safe	Almost everything is discussable without filtering.
2	Neutral	Most things are discussable without filtering.
1	Dangerous	Many of my best ideas are not discussable.
0	Treacherous	Most of my best ideas are not discussable.

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built during a requirements-gathering meeting that I facilitated at a large manufacturing company.

Interpret and Respond

Ask the participants, “What is your interpretation of the histogram?” A manager in a requirements-gathering meeting said they needed to start trusting each other. His management colleagues vigorously echoed his belief. And his colleagues had a lot more to say about the importance of trusting each other. I let this discussion continue for 10 minutes and asked, “What cluster of people on the histogram do you think is offering the most advice?” The room fell silent. The people who felt the safest realized that they were doing the most talking. They realized that the people who felt threatened were not talking.

Telling people how they should feel does not work. And, in my experience, people know that as a fact, but forget to put that knowledge to work. It helps to give them a gentle reminder. Ask everyone, “How do the participants who feel completely safe help the participants who feel threatened?” The answers I have heard in meeting after meeting can be summarized in two words: care and listen.

During a manufacturing meeting, people did start to care and listen. The participants slowed down and asked each other questions. Most importantly, they were okay with moments when no one spoke. I believe that silence is a gift. It shows people that you are ready and want to listen. And, in the case of a meeting, silence demonstrates that the group is ready and wants to listen.

These changes made a big difference in the requirements meeting. The discussions were deeper. The enriched conversation enabled the discovery of requirements that would have been invisible to them. They were more effective together than they had ever been.

Other Methods

Another method that can help create safety, especially in large groups, is to let the participants build the safety guidelines for their meeting.

Split the participants into small groups. The ideal size is a triad – three participants. Ask the groups to (1) introduce themselves to each other, and (2) create a set of guidelines for conducting a safe meeting. Give them a few test cases to ponder. For instance, someone starts blaming someone else, someone tells an inappropriate joke, or someone dominates the meeting, and so on. Let everyone

Level	Description	Number of People
4	Secure	*****
3	Safe	*
2	Neutral	****
1	Dangerous	****
0	Treacherous	

Table 2: *The Histogram From an Actual Safety Check*

know that they should not limit themselves to the test cases. You want them to share any guideline that will make the meeting safer.

The hope is that the discussion will help remind people of what they already know about safety, and remind them to practice what they know. Just as importantly, the hope is that a connection with a small, manageable number of people will increase safety.

Have each small group introduce their members and share the safety guidelines they created with everyone. You will be

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amazed at the wisdom that people have about safety. Gain agreement from everyone on which guidelines to accept. Remind them that the guidelines are theirs rather than yours. If someone violates a guideline, you will call them on it.

Ask the group to monitor your facilitation and to inform you if you allow any deviation from the agreed-upon guidelines. When someone mentions a deviation, treat it with the utmost care and respect. It is the ultimate demonstration of the value you put on safety.

Final Thoughts

Although the methods I discuss are especially valuable for setting the right tone for organizational improvement efforts or multi-day meetings such as a project retrospective, they are also valuable for reoccurring meetings. The key is to expose, explore, and respond to feedback about safety. If followed, the feedback will take the group in the appropriate direction.

Feelings about safety will change so it is a wise investment to have a process for periodically exposing and responding to issues about safety.

Regardless of the method used, you can never be absolutely certain that all the participants feel safe. If someone would have asked me how safe I felt during the meeting with Harry Fox, I would have voted neutral or safe so that Harry would not find out.

The best that you can do is to solicit and respect everyone’s ideas. The leader who models appropriate behavior in meeting after meeting is constantly renewing and enriching safety and productivity.

Be a leader. Care. Listen. Model the behavior you want. ♦

Note

1. The views expressed in this article are Smith’s and do not necessarily reflect the views of EMC.

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