



Meeting Capture

Productivity and Risk Reduction for Project Teams

Project teams struggle to make better use of the investment they make in meetings.

Whether you are a project manager, consultant, or member of a technical team, meetings are an important — though not always welcome — part of your job. Meetings let you exchange information and negotiate commitments, but they can also be time-consuming, inefficient, and their outputs quickly forgotten. **Meetings are critical to project success, but often wasteful. How can you reduce the drain and increase the gain?**

Ironically, remote-meeting technologies may even be making the problem worse. Now it is easier than ever to *hold* meetings, loaded with data and charts, but not any easier to *follow up* on meetings. With the increasing complexity and volume of communications, project teams struggle to make better use of the investment they make in meetings.

A new approach, recently gaining favor with project teams, is to capture the content of key meetings as multimedia files, indexed for easy reference. Stakeholders can now miss a meeting yet skim highlights later. Participants can recall details and action items, and subject-matter experts can provide feedback on discussions they missed. This approach is made practical by new, easy-to-use software that produces fully-indexed content in real time during the meeting, saving time and effort.

Common Problems with Meetings

Traditional forms of communication present hard tradeoffs: Spoken communication is natural, but relies on human memory for follow-up. Written documents, on the other hand, are persistent and searchable, but *creating* written data is slow. Meeting capture mitigates both of these limitations — human memory and data entry — and benefits projects in three important ways: (1) *Productivity*. It helps project members make better use of their time; (2) *Risk reduction*. It provides timely and accurate reference documents that team members can consult when implementing decisions; (3) *Accountability*. It promotes active follow-up by capturing commitments made. Let us review these in turn.

Productivity: Making the best use of time

Project members are under pressure to deliver results, and their time is at a premium. Meetings cut into individual work time and so should be held only when necessary, for example, to achieve consensus and alignment, or to provide context for further work.

Often, however, it is hard to predict in advance which topics will be relevant to which team members and stakeholders. These judgments are imperfect. Thus some individuals will inevitably attend meetings that turn out to be irrelevant, while others miss meetings that turn out to be crucial. The productivity loss, in either direction, is considerable. For instance, keeping an absent team member in the loop might require holding another meeting, drafting a written summary, or re-explaining what has already been discussed once. Both over-attendance and under-attendance waste an organization's resources and erode its productivity.

Accuracy: Getting the details right

As a way to exchange project information, meetings offer important benefits. The volume of detail that can be efficiently communicated is large, as people speak faster and more easily than they write. Furthermore, the interactive format of a meeting provides flexibility as to which information is exchanged, allowing a huge reservoir of potentially relevant details to be tapped selectively as the discussion unfolds. Finally, for many people, spoken language has more personal impact than text.

However against these benefits one must consider the drawbacks, especially when it comes to accurately preserving what was said. Indeed, many meetings are not formally documented. Instead, it is assumed that each participant will retain, in his own way, those details relevant to further action, typically through personal notes or simple memory. Sometimes presentation materials (e.g., PowerPoint slides) are circulated in lieu of documentation, or group minutes are prepared that attempt to summarize the major points discussed and the key decisions and actions taken.

The problem with all these methods is that they offer no way to guarantee completeness and accuracy. Human memory is notoriously error-prone and fades quickly. Written summaries may omit important details and represent only one view of the discussion.

All of these problems contribute to imprecise follow up. Errors are introduced, team members make incorrect assumptions, then interrupt one another during the workday to fill in gaps in their memory – with details recalled imprecisely by their colleagues. Errors accumulate through chains of miscommunication, with potential consequences ranging from reworks and non-compliance, to financial or legal liability – consequences that can extend far beyond the project itself. For this reason, teams are well served by new technologies that help them execute their tasks with greater accuracy and precision and help them avoid problems before they arise.

Accountability: Noting commitments made

Completeness and accuracy are especially important in the area of task assignment and accountability. Group meetings are often the arenas where work is ar-

articulated, that is to say, where large, amorphous goals are broken down into more manageable tasks and where responsibility for those tasks is taken on. These are cognitive and social tasks of some complexity, central to the success of any project. Projects often fail because of lack of clarity about what tasks need to be performed, who is responsible for them, and when they are due.

Formal summaries of action items, the traditional way of recording decisions, are meant to serve two purposes: sharing what was decided, and triggering action on the part of the task owner. In reality, these summaries are usually ambiguous or incomplete in themselves, and project members must rely on the context of the discussion that led to the commitment for a full definition of the task and of the assumptions under which it was undertaken. These contexts are slippery. Almost anyone involved with project work can attest to situations where nebulous recall led to bad outcomes for the project or for individual team members.

Toward More Objective Meeting Documentation

Given the diversity of problems described above, it is surprising to find that a single practice can help address them all, namely: documenting the original meeting, in multimedia form, as an accurate reference document – a practice referred to as *meeting capture*. This practice has shown itself to be quite powerful and is being increasingly applied by project teams to challenges like distributed workgroups, technical risk, staff turnover, or other common problems. Before considering the practical side of *how* meeting capture is done, let us first review how this simple activity directly addresses the issues raised above.

Regarding productivity, meeting capture lets people make better use of their time by expanding their choices. No longer is it necessary to approach the question of meeting attendance as a binary choice: either attend the meeting, hear everything and participate fully; or miss the meeting, hear nothing, and provide no feedback at all. Now, with meeting capture, there is a third choice: miss the meeting, but retain the option to review highlights selectively (in full detail, if desired) and provide feedback offline.

This flexibility lets teams do a better job of load balancing, countering the tendency to over-invite meeting participants “just in case.” When a team member misses a meeting, captured content can fill the information gap, letting him come up to speed quickly and efficiently. It also allows the meeting owner to leverage the meeting output, because information captured in a meeting is also available for other purposes such as training, report generation, and lessons learned.

As for accuracy and accountability, capturing meetings produces timely, complete, and exact representations of the events in question, thus reducing miscommunication and non-communication. By getting the details right, the team can reduce the incidence of errors, omissions, and reworks. Capturing meetings also brings a measure of objectivity into the meeting follow-up process. Commit-

ments are on the record, and this has a natural social tendency to encourage accountability of the team members.

New Technologies Make Meeting Capture Easy and Automatic

Given the value of meeting capture in principle, how easy is it in practice?

The requirements are simple: Meeting participants want to minimize effort and disruption during the meeting. Meeting content owners want to streamline dissemination of material to stakeholders while maintaining managerial control. Consumers of meeting content want an experience comparable to authored multimedia, with excellent audiovisual fidelity, indexed playback, and full access to display data.

The Quindi Meeting Companion represents an emerging category of meeting capture tool, designed to meet these real-world requirements in a lightweight, easy-to-use personal software system. During the meeting, participants communicate as usual: talking, showing slides, and taking notes. Meanwhile, the meeting is being captured as a multimedia file, indexed for easy reference.



Quindi Meeting Companion

An individual attends a meeting with his laptop or tablet PC. He may use the built-in microphone for audio capture, or he may use an external microphone, and optionally a webcam. He launches the Quindi application and begins recording. If he makes a presentation, the slides are captured and indexed automatically, as are screenshots and bookmarks. None of these operations require direct manipulation of the Quindi graphical interface. Note-taking is optional, but if notes are entered they too are time-stamped, synchronized, displayed as icons on the timeline, and made searchable. The content is stored in a file of modest size (starting at about eight megabytes an hour for audio, ten for visual storyboard).

After the meeting, the file is immediately available for navigation and playback. The Quindi interface makes it easy to navigate by keyword, extract highlights, add personal comments, and share segments. Thus natural interaction with the

meeting content after the meeting itself adds value for the viewer and his teammates. This includes people who missed the meeting and want to see highlights, and people who were at the meeting but need to review the details. Comments can also be added after the meeting, creating a kind of virtual meeting thread.

The Quindi Meeting Companion takes advantage of trends in the meeting room: digital note-taking, web-conferencing, PowerPoint presentations, whiteboard capture, and the like. The ability of the Quindi software to include and bookmark meaningful data from these sources gives the user a practical way to search his meetings. Data indexing lets him find the points of interest, just as with text documents. He can then drill down into the full audio recording for details, if he chooses.

To get started with meeting capture, a project manager simply identifies which milestone meetings are worth preserving. It need not be all of them – just the ones considered valuable. A repository or a file server is specified where the documents will be stored, and individuals are designated who will be capturing the meetings or adding content afterwards.

During the project itself, the meetings are captured and posted and stakeholders receive notices or are given a link to the captured content. The resulting project archive can either be retained or culled, depending on the organization's document retention policy.

Milestone Meetings

- Kick-off
- Requirements
- Planning
- Project status
- Design review
- Project review
- Technical talks
- Field training
- Tutorials
- Lessons learned

Conclusion

Tools like the Quindi Meeting Companion do not aim to eliminate meetings or other forms of real-time interaction. Still, in many situations much of the information *generated* in a meeting can be *conveyed* afterwards and feedback can be provided offline, without the need for in-the-moment participation. Not only does this make better use of people's time, it produces a reference document that provides solid support for meeting follow-up. Of course, no technology can eliminate project risk, but meeting capture reduces risks due to miscommunication and misalignment to a minimum, while extending the value of the meeting beyond the limits of time and place.