



Behavioural Checklist for Chairing Meetings

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We partnered with behavioural insight agency Behave London, to help us better understand how group dynamics can impact broader decision-making and planning strategy. Through carrying out this work, it is clear that how a meeting is chaired has a direct impact on the board as a whole, the decisions made and how effective those decisions are. Our research also showed that although trustees are better than the general public at mitigating their cognitive biases, errors in judgment are still apparent.

Performance highly correlated to psychological safety

Although it may seem odd to declare that grown-ups and particularly trustees need to feel 'safe' to air their concerns, previous studies have shown that high-performing teams have one thing in common. They have all successfully embraced psychological safety.

Kahn (1990) defined psychological safety as 'being able to show and employ one's self without fear of negative consequences of self-image, status or career.' Psychological safety is about creating an environment where people feel confident in taking risks of self-expression, challenging the status

quo and engaging the processes of change. There are four factors that have shown to influence psychological safety: interpersonal relationships, group dynamics, management style and process.

Essential for the highest-performing teams is the belief that you will not be punished when you make a mistake.

All trustees can help to create a meeting in which everyone around the table feels safer in taking the risks of self-expression and engaging the processes of change.

We have developed this checklist to help you combat behavioural biases when planning for and chairing meetings.

Before the meeting

▶ The role of the chair is critical to a well-run meeting. There is an automatic 'authority effect' which comes with the role, and the upshot of this is that as a captain steers a ship, you can steer your trustee meetings to better results.

Use an agenda structure that has long-term planning built in. Check out our [Trustee Meeting Framework](#) to give you ideas.

Consider allocating time for unplanned items to ensure you have sufficient time to consider all meeting items, including ones that are tabled at short notice.

Consider reaching out to new trustees before the meeting to engage their views.

During the meeting

1. Use your authority

▶ Make the meeting a safe environment for everyone to voice their concerns, and practice zero tolerance if individuals talk over each other, or shoot each other's ideas down.

Control who speaks. Go around the table clockwise, anti-clockwise, and select people to speak. Give the introverts equal airtime.

Ask for dissenting voices. Ask twice.
'Does anyone have any further reservations?'

2. Get everyone to consider the long-term

▶ Steer the group to look at the bigger picture. It is much harder to make decisions which are about the long-term. They are more complex, more uncertain and less tangible. The reward is not immediate – and we have a strong preference towards prioritising things that are closer to us in time.

When we weigh up decisions, there is a tendency to fall prey to present-bias. The further away the negative consequences, the more likely it is we will make a mistake in our decision in favour of what feels good in the here and now.

Thinking about a future where everything has gone wrong helps us to see the potential causes of that, rather than weighing up just the 'likelihood' of what might go wrong.

3. Beware of the messenger effect

▶ We are heavily influenced by who communicates information to us.

Solicit everyone else's opinion before giving your own.



4. Frame it!

➤ Frame the same question in two different ways – positively and negatively. We act differently to the same information, depending on how it is framed.

Frame questions in such a way that members around the room feel invited to speak up.

Framing the problem in two different ways can make a drastic difference to how it is approached and answered. Present the agenda item to the group as both an ‘opportunity’ and as a ‘threat’.

5. Reviewing an existing strategy / asset manager?

Watch for status quo bias

➤ Beat status quo bias by imagining the opposite.

Consider asking questions such as “What if we were all invested in cash?” “Would we pick this asset manager?” “If we started the scheme today would we pick this strategy or this asset allocation?” “Is what we have a hangover from what we had before, and not based on our current goals?” Imagine the whole board has resigned – what would the new trustees do?

6. Break big problems into little ones; make them relatable

➤ Turning macro into micro. When faced with a question about ‘Gary’ the member being overpaid on his pension, or a big group of members all being overpaid the same £20,000 in aggregate, trustees were quick to get Gary to pay back the money, but either avoided or postponed the decision when it was a large group of members.

To avoid this situation, try to frame problems from both a group perspective, and from the perspective of an individual.

7. Watch out for how information is discussed around the table

➤ Ordering affects how we see things. The positioning of a piece of information, ie, what comes before or after it, influences how it is perceived. If the first person to speak is positive, watch out for a positive ripple around the room and vice-versa.

As you will be last to speak, you should weigh in with the counter view and ask people to consider the reverse of what they just said.

After the meeting

Use the time between meetings

➤ Once the meeting is over, the work should not stop.

Are your flexi teams and exploration teams available to progress the meeting actions?

Contact us

If your trustee board could benefit from taking a step back and considering how they work, get in touch to find out more about Aon’s suite of Trustee Effectiveness tools. We can help you enhance your understanding of your current operational effectiveness and governance but also take tangible steps towards improvement. Contact your usual Aon Consultant or one of the contacts below.

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