

ESSENTIAL MEETING STRUCTURES

Author: Gregory Cleary

“Whether we like it or not, meetings are the closest thing to an operating room, a playing field or stage we have. Yet most of us hate them. We complain about, try to avoid and long for the end of meetings, even when we are running the darn things! How pathetic is it that we have come to accept that the activity most central to the running of organizations is inherently painful and unproductive?”

From the introduction to ***Death by Meeting*** Patrick Lencioni

It does not have to be that way. Meetings are how Leaders and Managers execute the work and get weigh in and buy in. How we get things done and keep everything on track and held together.



PINNACLE

BUSINESS GUIDES

ESSENTIAL MEETINGS

- **STANDUP** (Daily)
- **TACTICAL** (Weekly)
- **FINANCIAL & ROCK ACCOUNTABILITY** (Monthly)

RECOMMENDED CADENCE

Monday: Tactical *Weekly for 90 minutes*

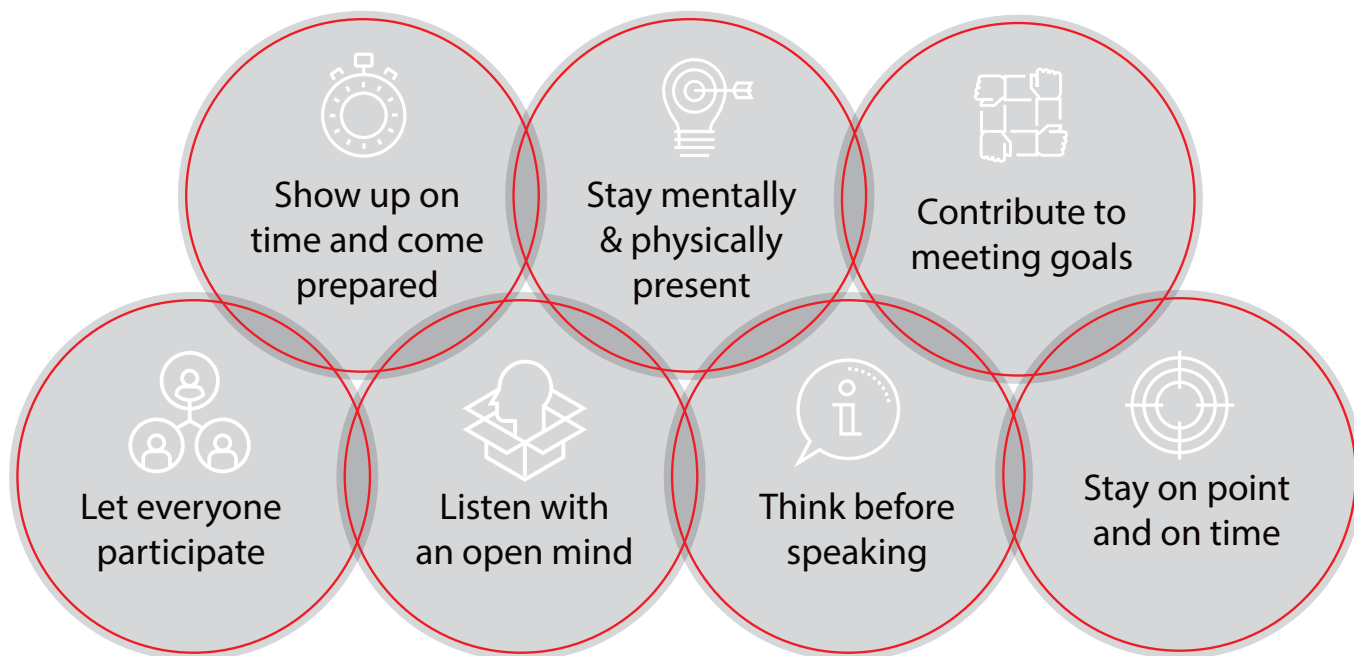
Tuesday: Stand Up

Wednesday: Stand Up

Thursday: Stand Up

Friday: No Internal Meetings

RULES FOR GREAT MEETINGS



NEXT LEVEL MEETING STRUCTURES NOT COVERED HERE

1. Focused One Topic
2. Bivouac Break
3. All Hands
4. Alignment at the Top
5. Coaching Conversation

STANDUP

It is all about tactics and communication.

Daily: 10-15 Minutes

Let colleagues know what you are working on, and that you hear what they are working on. Horst Schulze at Ritz Carlton started the Daily Huddle. It eliminates "nobody ever told me." You will quickly start to see and hear patterns.

Objective

- Keep team members aligned and connected
- Execute faster with a game plan for the day and/or shift: Win the Day

Agenda

1. **What happened yesterday** that the team needs to know?
2. **What is happening today** that the team needs to know?
3. **Where do you need help?** Where are you stuck?



HOW TO MAKE IT STICKY:

- Start at an odd time to make it easier to remember. For example, 8:07 – 8:17 am.
- Give it a name: GSD, 8:17 Express, 7:47 or “All In” for example.
- Needs specifics: Names, Numbers, Customers.
- Verbalize what has got you frustrated.
A stuck is not something that this team can help you with.
You are sharing your frustration.
- Think of it as the headlines of your local newspaper.
- If someone is not sharing where they are stuck or need help, there’s likely a people issue, a team health issue, or both... Probably not really sharing.

TACTICAL

It is all about priorities, debates, and execution.
Weekly: 90 Minutes & replaces the Standup that day

What are you not getting from your team that you need from us?

What is not being said that needs to be said?

Who needs our attention this week?

Objective

- Check in on important numbers / Did we win the week?
- Ensure Quarterly Priorities stay top of mind
- Keep a pulse on our Team and our Customers
- Tackle The List—Keep Moving Up The Mountain!

Agenda

- 1. Set the stage!** First 10 minutes is the hook for the movie. Own the field
- 2. Check-In:** What's up?
- 3. Scoreboard**
 - a. Did we win the week? If so, why, or why not?
 - b. It is not about data, it's about judgement.
- 4. Rock Review:** Tell us in one sentence each...
 - a. What did you do last week to move this forward?
 - b. What will you do this week to continue to move this forward?
- 5. Accountability from last week** "Who does what by when".
- 6. Team Engagement:** What did you do this week that was a magical moment for a direct report or team member?
- 7. Business Development /Voice of the Customer**—Brief headlines on Biz Dev and Voice of the Customer.
- 8. The List of Topics:** Everything that you need this team to hear or help with.
 - a. Decide: Decision to make.
 - b. Share information or have a conversation.
 - c. You need help or ideas from the team.
 - d. Obstacles that need to be tackled.
- 9. Check-Out**
 - a. Who needs to know what?
 - b. Summarize the priorities for this week.
 - c. Did we have enough healthy conflict and debate? Yes/No
 - d. Did we have a great meeting? Rating 1-6



FINANCIAL & ROCK ACCOUNTABILITY

Take one of your weekly Tactical Meetings and use this agenda instead.
Monthly: 2-4 Hours

"90% of small-business failures are caused by poor cash flow." – Dun & Bradstreet

Objective

- Improve Financial Health
- Leadership Team to own ALL Quarterly Rocks and understand where they are and what they need to do next to move them forward.

Agenda

1. Check-In

- a. Personal Best and Business Best
- b. Any Uh-oh Moments this month?

2. Review Prior-Month Financials

- a. Actual vs. Budget Variance Report
 - i. Deep Dive into Deviations with General Ledger if needed
- b. Balance Sheet
- c. 13-week Cash Flow

3. Leadership Team members give an update on their Quarterly Rocks showing progress and discussing what's next to keep them on track.

4. 1-2 Big Topics—These topics should either improve our Financial Position or Get Rocks Back on Track

5. Action Items

6. Check-Out



Financial Tools

Power of One
Cash Acceleration Strategies
13-week Cash Flow Forecast
Profit Per X
Anatomy of a Sale
Get Work—Do Work—Get Paid

Recommended Readings

Profit First
Ownership Thinking
Simple Numbers

Additional Reports That Can Be Helpful

- AR Report
- AP Report
- Sales pipeline - such as # jobs and dollars proposed
- Inventory
- Capex / Investment in Growth
- Recurring Revenue vs. One-Time Revenue
- Complaints / Compliments
- Employee Satisfaction
- Employee Turnover
- Website Metrics

LENCIONI – DEATH BY MEETING

INTRODUCTION

The greatest myth that exists about meetings is that they are inherently bad. As a business society, we've come to accept that meetings are unavoidably painful and unproductive—one of the necessary evils of organizational life. But the fact is, bad meetings are a reflection of bad leaders. Worse yet, they take a more devastating toll on a company's success than we realize. Fortunately, for those organizations that are willing to challenge the notion that meetings are unfixable, it is possible to transform what is now tedious and debilitating into something productive, focused, even energizing. The key to improving meetings, however, has nothing to do with better preparation, agendas or minutes. To address the problem, leaders will need to take a contrarian view of meetings and apply a few basic guidelines.

The first step in transforming meetings is to understand why they are so bad. There are two basic problems. First, meetings lack drama. Which means they are boring. Second, most meetings lack context and purpose. They are a confusing mix of administrivia, tactics, strategy and review, all of which creates unfocused, meandering and seemingly endless conferences, with little resolution or clarity.

DRAMA

The key to making meetings more engaging—and less boring—lies in identifying and nurturing the natural level of conflict that should exist. One of the best places to learn how to do this is Hollywood. Directors and screenwriters learned long ago that movies need conflict to hold the interests of their audiences. Viewers need to believe that there are high stakes on the line, and they need to feel the tension that the characters feel. What is more, they realized if they didn't nurture that conflict—or drama—in the first 10 minutes of a movie, audiences would lose interest and disengage. Leaders of meetings need to do the same by putting the right issues—often the most controversial ones—on the table at the beginning of their meetings. By demanding that their people wrestle with those issues until resolution has been achieved, they can create genuine, compelling drama, and prevent their audiences from checking out.

CONTEXT AND PURPOSE

Unfortunately, no amount of drama will matter if leaders don't create the right context for their meetings and make it clear to team members why the meeting is taking place, and what is expected of them. To create context, leaders must differentiate between different types of meetings. Too often, however, they throw every possible conversation into one long staff meeting. This creates confusion and frustration among team members who struggle to shift back and forth between tactical and strategic conversations, with little or no resolution of issues.



P I N N A C L E

B U S I N E S S G U I D E S