



Meetings That Matter

The 4 Things Every Effective Team Meeting Must Include



Why Meetings Matter

Teams spend a lot of time in meetings – sometimes it seems as if that’s all they do. And that’s because meetings are essential for effective teams. It’s the most efficient way to communicate especially for project teams made up of multifunctional groups or teams spread across many locations. Meetings ensure that everyone hears the same key information at the same time; meetings allow teams to problem solve together capitalizing on the combined wisdom and experience of the group. Meetings are a great way to share information, work on problems, clarify expectations, provide direction and assign work. In other words, you can’t be an effective team without meetings.

One of the major complaints about meetings, however, is that they take valuable time away from doing. And that’s one of the key reasons why meetings need to be engaging, worthwhile, effective and productive. Meetings are where a lot of team work gets done – you can’t be a successful team without effective meetings. The best teams ‘do great meetings’.

This guideline explains the 2 types of team meeting and describes how to plan and conduct an effective tactical meeting. Because meetings are so important, all leaders need to be highly proficient at this skill. Using this guide will improve your ability to lead meetings that matter.

All Meetings Aren’t the Same

Understanding what type of meeting is best suited for different situations ensures your team will get the best outcome from the meeting. This concept is at the heart of Patrick Lencioni’s book in which he uses an engaging story to explain that some meetings are **tactical** and some are **strategic** in nature. Because each of these meetings is so different you should only deal with tactical items in a tactical meeting, deferring strategic issues to a separate meeting. On the face of it this doesn’t sound like rocket-science but on reflection I wonder if this is at the core of why many meetings don’t accomplish much. If each of us comes to a meeting with disparate expectations about the intent or has a different belief about what should happen during the meeting, it’s no wonder meetings frequently fail to meet expectations.

The material in this meeting guide is based on two great resources I highly recommend:

- »» Death by Meeting: A Leadership Fable by Patrick Lencioni
- »» Meeting Excellence: 33 Tools to Lead Meetings That Get Results by Glenn Parker and Robert Hoffman



This guideline describes how to conduct a tactical meeting. Mastering tactical meetings is one of the best ways to improve team performance. So let's start by clarifying the difference between the two types of meetings, **STRATEGIC** and **TACTICAL**

Strategic Meetings

The strategic meeting, lasting about 2 – 3 hours, is where the team tackles the critical issues that affect their long-term success. These are the issues and problems that need to be discussed in depth in order to get all the best possible options on the table. A meeting focused on strategic issues gives the group the opportunity to really review the impact of any decision through analysis and discussion. In most instances, only 1 or 2 issues can be discussed at a strategic meeting as each issue usually needs at least 1 hour for thorough discussion.

Prior to the meeting everyone needs to do some homework – either to read information provided by the topic leader or to do their own research. And, everyone needs to commit to engage in robust, open and honest dialogue.

Tactical Meetings

Dependent on the workload and the type of tasks the group needs to accomplish, a daily meeting can be very productive. A daily tactical meeting can provide a quick way to ensure that nothing falls between the cracks and allows for clarification of who is doing which tasks during particularly busy times. This is best done as a daily stand-up meeting limited to no more than 10 minutes. The only purpose is to establish and clarify the group priorities for the day – who needs to accomplish what. A good way to start this meeting is to very quickly review what was accomplished the previous day and identify any obstacles that impeded the previous day's success. It is the leader's responsibility to make sure the obstacles don't reappear.

The key to the success of this meeting is that the leader says nothing – other than to ask what assistance or resources the group needs to meet the goals for the day. This meeting is all about the team self-organizing to accomplish their priorities for the day.

Tactical Team Meetings

Regular meetings focused on tactical issues are essential for effective execution of projects. To be productive and worthwhile they need to happen on a regular basis (often weekly), have a defined structure, and last no more than 90 minutes. And all core members of the team must make a commitment to attend the tactical meetings. They have to agree to make tactical meetings a priority. In return for this commitment, the leader must ensure that the meeting is run effectively and the content is relevant to the work of the team.

Going a step further, Lencioni suggests that you can keep people engaged in a meeting by making sure the meeting surfaces relevant conflict – constructive conflict that leads to passionate discussions resulting in better decisions. While conflict sounds like the last thing you want at a team meeting, in fact it's an essential skill for high-performing teams. Robust dialogue to ensure all voices, perspectives and alternatives are considered is how truly great teams distinguish themselves from the merely good



The 4 Components of an Effective Tactical Meeting

1

THE LIGHTNING ROUND

A tactical meeting starts with a lightning round – a quick ‘round-the-table’ check-in to hear about everyone’s top 2-3 priorities for the week. These are the things that have to get done and need to be actual, doable action items so you can be clear when they’ve been accomplished. The lightning round gives everyone an idea of what is going on, makes sure there aren’t overlaps or gaps in accountabilities and brings to light show-stopping issues or rate-limiting activities that can grind everything to a halt if they don’t get accomplished. The intent of the lightning round is to ensure everyone understands each other’s work and gets clarity on what the priorities are for the next week. The key success factor for the lightning round is limiting it to 1 minute for each participant to state the objectives for the week; no one can interrupt or comment. Listen, take notes if you want and don’t talk until your turn.

2

KEY METRICS REVIEW

Next is the key metrics review of the tasks and targets essential to hitting your team goals. This is a simple summary of where you are for each target – ahead, on-target, concerns or behind and should take about 5 minutes to complete. Reviewing the key metrics at each meeting focuses the team on the critical milestones and helps prioritize when there are more tasks than resources. This section of the meeting is the status update on the progress the team is making toward their most important goals. The key to success for the metrics review is to only report the progress without any discussions about the underlying issues. The goal of review is to surface the issues that help create the agenda.

3

CREATING THE AGENDA

Next up is the agenda. I know – shouldn’t you set the agenda before the meeting? Not setting an agenda until you are 10-15 minutes into the meeting seems to fly in the face of everything we have every been taught about meetings. But remember this is a tactical meeting. It’s about understanding the issues of the day, the problems that are getting in the way of the group accomplishing their goals. The agenda for a tactical meeting is based on what the team is working on and where they are relative to the targets set for the group. It isn’t until you have gone through the lightning round and key metrics review that you can be clear about what’s truly important.

Tactical issues and problems are the focus of this meeting – making sure the group is clear about their priorities, what needs to happen and who has responsibility for which outcomes. The difficulty with the team leader setting the agenda in advance is that they aren’t always up to date on which are the most important issues. For busy project teams, what was relevant 48 hours ago when the agenda was set may no longer be important at the time of the meeting. Setting the agenda based on issues identified during the lightning round and metrics review keeps the meeting relevant and ensures it supports the work of the team. By using this format the team creates the agenda that is most meaningful to the work they need to get done.

Following the lightning round and metrics review the team can easily identify the tactical issues that have to be addressed to stay on target and prioritize the issues that need to be resolved during the meeting. The team sets the agenda that matters most to them and is most relevant to their work. Any strategic issues that come up get put in the ‘parking lot’ for discussion at a strategic meeting. Strategic issues are complex and need time for brainstorming, research, analysis and preparation. The tactical meeting isn’t the right place or time to deal with strategic issues and will take the focus away from solving the tactical issues and problems that might impede team progress. The key to success for setting the agenda is for all team members to listen for possible agenda items during the lightning round and progress review so they are ready to contribute to creating the agenda.



The 4 Components of an Effective Tactical Meeting (con't)

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WORKING THE AGENDA TO GET RESULTS

By this point you should be about 20 minutes into the meeting. Let's review how much you've accomplished:

TIMING	MEETING COMPONENT	OUTCOME
5 Minutes	Lightning Round	The team is clear about the priorities for the next week
10 Minutes	Key Metrics Review	The team knows where they stand relative to the targets and milestones
5 Minutes	Tactical Agenda	The team has identified the issues that matter most to accomplishing their targets and milestones

That's a pretty good list for 20 minutes of effort.

If all you got done at a meeting was identifying obstacles that impede the team goals and got clarity about priorities wouldn't that alone make this a meeting worth attending? Now that you have established an agenda of the issues most important to the team you are ready to get into the **real work**:

- >> **Clarifying priorities** and **organizing the work** effort needed to make sure the most important things get done;
- >> **Resolving issues** that will impede the team's success during the next week;
- >> **Sharing resources**, expertise and skills to accomplish the key priorities;
- >> **Making decisions**, agreeing on next actions and creating a communication plan.

Key Success Factors

Here is a summary of the key factors that ensure a successful tactical meeting:

1. Don't allow detail during the lightning round. The goal is to share the wins, understand the challenges ahead and identify the right issues for discussion and resolution. Stick to 1 minute per person; the only questions others can pose are for clarification – no discussion.
2. Report only those metrics that measure progress toward the most important team goals. This isn't the time or place for laundry lists of all the routine tasks you completed.
3. Don't set an agenda ahead of time; let the work priorities as defined by the team and their progress toward the key metrics determine the agenda. Make sure the team agrees and prioritizes the agenda before proceeding with the rest of the meeting.
4. Defer strategic issues to a strategic meeting. Tactical meetings need a different perspective and mind set; it's important to keep the two types of meetings separate.
5. Appoint a timekeeper to help the team stay on track and a scribe to complete the meeting guide and distribute it after the meeting.



Tools For Success

Meeting Guide

In addition to capturing the team priorities and progress toward important goals, the **meeting guide** is used to record the decisions the team made and the actions they have committed to completing and the messages that need to be communicated beyond the team. It's important that the team identify not only who needs to know about a decision or an action, but who wants to know and who should know as well as who is responsible for ensuring the communication takes place and by when. Getting in the habit of being intentional about communicating team information helps to reduce misunderstandings that can result in frictions and wasted work effort.

Effective use of the meeting guide means there is no need to create separate minutes after the meeting. Simply copy the document, circulate it, post it and file it – electronically or hardcopy, whatever it takes to ensure everyone is aligned and expectations are clear. It should take about 10 minutes to complete and circulate the meeting guide as a record of what happened during the meeting.

The key to success for the meeting guide is to complete it in the meeting and get agreement on the actions, decisions and communication plan with everyone in the room. Make sure actions really are true, doable actions. Too frequently teams note vague actions that aren't clear about what the outcome needs to be. For instance, *"Project plan by April 17"* could easily mean different things to each person on the team. It might involve many separate steps and actions by multiple people such as review and approval by groups outside the team. Because it isn't clear what the successful outcome is for this action there is a real chance that it won't get completed properly.

In the example of the project plan a more appropriate action might be *"Complete individual sections of the project plan ready for final review by the management team: April 17 Bob, Susan, George, Jason, Emily."* This description makes it clear who on the team has a responsibility and adds clarity about the expected quality outcome for this action – the project plan needs to be good enough for management team review. Setting clear expectations about the work of the team avoids misunderstandings and keeps projects on track.



Evaluating your performance

If you are the meeting leader you need feedback on the effectiveness of the meeting. If you want to improve you have to ask for feedback.

Here's what I suggest you evaluate after each team meeting by asking participants to complete the meeting evaluation form:

1. Did you follow the Tactical Meeting format for the Lightning Round and the Metrics Review?
2. Were the agenda items the ones that mattered most to the team?
3. Did everyone have a chance to contribute to the discussions?
4. Did everyone take part in the decisions?
5. Did everyone listen respectfully with only one person speaking at a time?
6. Does the meeting guide accurately reflect the decisions made and the next actions?



Turn Learning Into Action

Now that you have read this far, take a few minutes to reflect on what you have learned and consider what you might want to put into practice. Here are some questions to help you get started:

- » What's working well in the meetings you attend and those you lead?
- » What are the opportunities for improving your team's meetings?
- » What should you do differently at the next meeting you lead? The next meeting you attend?
- » What might get in the way of making this change?
- » What can you do to make this change successful?
- » What would each member of your team say is the purpose of your regular team meetings?
- » How similar or different might the answers be amongst the team?
- » How might this affect the success of your meetings?
- » How do you communicate the decisions and action items from your meetings?
- » How much effort does this require? How useful is it? Does the time spent reflect the value?
- » What are the opportunities for improvement?
- » How does your team keep track of commitments made in the meeting? What works well about this process? What changes could you make that will result in more follow through on commitments?
- » How do you know where the team stands relative to progress on key targets and important milestones?
- » What are the opportunities for improvement?
- » How successful is your team at surfacing the issues and challenges that are getting in the way of achieving critical targets? The important but not critical targets? What might be the benefit of surfacing these issues on a regular basis?
- » Are you leading meetings that matter? Do your meetings clarify priorities, prioritize work, resolve issues and make sure the right decisions get made?



Becoming proficient at leading effective tactical meetings is an important skill, one that can quickly boost the productivity of any team.

What are you committed to implementing at your next meeting to make sure it is a meeting that matters?

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About the Sutherland Consulting Group

The Sutherland Consulting Group specializes in helping leaders and teams who want to find a better way to use their skills and experience to meet project goals.

Teams all start out with the purpose of achieving project success – on time, on budget and with quality. But all too often as the project progresses, the team starts to struggle to meet targets and timelines, even though everyone on the team is smart, capable and has the necessary skills and experience. Despite their best intentions the right decisions don't get made, deadlines are missed, communication deteriorates and the costs start to mount.

What if your team could function cohesively, collaborating to set and achieve goals and deliver projects on time and on budget? What if your team made better decisions more quickly? What would be possible if your team communicated more effectively, eliminating frictions, misunderstandings, and wasted effort?

We are committed to helping teams learn how to leverage the individual strengths and expertise of the team. We focus on improving the ability of the team to collaborate, make better decisions and communicate more effectively. Teams that excel in these skills are able to plan and execute complex projects; identify and resolve problems before they impact results; collaboratively seek creative solutions and turn conflict into opportunity. We believe in the power of teams to achieve the impossible.



About Karole Sutherland

Karole brings a passion for leadership to her work with clients as well as 30-years in corporate leadership roles. She's worked on the front-lines and has led from the executive suite in health care and drug development. Her expertise combined with her training are the perfect combination to support clients to build the leadership skills needed to create high-performance teams. Karole has coached executives, managers and team leaders at all levels. She has worked with small, co-located teams as well as with global project teams on large-scale international projects.

Her goal is always to help individuals and teams to work more effectively to get the right things done, to improve relationships and enhance understanding in the workplace. Karole has a Master's degree in Leadership from Royal Roads University and is a Certified Executive Coach accredited by the International Coaches Federation (ICF). She is President of the Vancouver chapter of the ICF and a member of the Organization Development Network, the Neuro-leadership Institute and the International Society of Performance Improvement.

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