

The Four Types of Meetings

Daily Check-In or Huddles, AKA Headline News

Time Required – 5 minutes

Share the days' priorities, schedules, and activity (for some organizations this is not practical, but do your best and always commit to the trial for a minimum of 2 months)

Success Tips

- Don't sit down, Stand!
- Keep it administrative
- Don't cancel even when some people can't be there

Weekly Tactical Meeting

Time Required – 45-90 minutes

Review weekly activities, metrics, resolve tactical obstacles, and issues

Lightning Round: 60 seconds per person share what they are working on that week and name 2-3 priorities/primary activities (this will help set the agenda). This helps identify potential redundancies, gaps, and other issues that require immediate attention. KEEP the details to a minimum

Some items will arise that need to go to the 'Parking Lot' for a Monthly Strategic Meeting (TEAM will vote on the topics, but you can't vote for your own topic; each member gets two votes).

METRIC Progress Review: for near-term goals (4-6, revenue, expenses, product development status, key account penetration, turnover, marketing/advertising)

Real-time Agenda: ASK What do we need to talk about today so we can make as much progress as possible this week? (limit conversation to topics that have an immediate impact on tactical issues and goals)

Success Tips

- Set agenda after initial reporting
- Get people hooked in the first 10 minutes then mine for ideological conflict and drive it to a conclusion
- Evaluate best and worst case scenarios and competitive responses to each possible action
- This is disciplined spontaneity which ensures the meeting will be relevant and effective

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Monthly Strategic Meeting (or as needed)

Time required – 2-4 hours

Discuss, analyze, brainstorm and decide upon critical issues affecting long-term success

Ad hoc meetings occur when the issue can't wait for the next monthly meeting, but also needs more time and dedication than the weekly meeting.

Success Tips

- Limit to one or two topics
- Prepare and do research
- Executives wrestle with, analyze, debate and decide upon critical issues that affect the organization in fundamental ways

Quarterly Off-site Review Meetings

Time required – 1-2 days

Review strategy, industry trends, competitive landscape, key personnel, team development. Critical meetings to take a step back from the daily, weekly and monthly grind to review things from a distance.

Allows review of the organization in a more holistic, long-term manner.

Success Tips

- Get out of the office
- Focus on work; limit social activities
- Don't over structure or overburden the schedule
- Discuss: competitive landscape, morale, team dynamics, top and bottom performers, customer satisfaction- anything that has a long-term impact on the success of the company
- Include: Comprehensive Strategy, Team Review, EE Review, Competitive and Industry Review

Overall Success Tips

- Choose a regular interval so the meetings don't fall by the wayside
- Don't put too many items on the monthly agenda to avoid diluting the quality of the debate
- Proper research and preparation for the strategic and quarterly sessions will ensure success