



DAILY HUDDLE (7 – 12 MINUTES)

PURPOSE

- » Surface issues needing immediate and wider-level discussion:
 - Escalate obstacles or chokepoints
 - Expose issues
 - Enable taking sooner corrective action
- » Peer pressure
- » Accelerate deliverables
- » Quickly communicate today's strategy
- » Reinforce core values, codes of conduct, or best practices
- » Keep progress and focus on wildly important goals and key initiatives
- » Boost organization energy

BEST PRACTICES:

- » This is not a meeting....it is a huddle.
- » Start and end on time.
- » Rotate the meeting leader (usually not the department head).
- » Complete 1 agenda item at a time to keep everyone engaged.
- » Stucks/Obstacles/Constraints
 - A constraint or a concern that could prevent someone from a great next 24 hours can be solved in many ways!
 - It relates to serving a customer, working with bosses, colleagues, working within the organization, across departments, and dealing with your systems and processes.
 - People that don't identify "stucks" are being passive, unaware, not team players, have trouble recognizing stucks, don't care, aren't paying attention to the broader picture, have a bias to not asking for help, and may be hurting the organization.
- » Use same huddle time every day – off time recommended (e.g. 8:17).
- » Set up conference bridge so that people who are late, traveling, or work outside the office can participate.
- » Have a way to capture and record stucks to make sure they are being addressed and patterns can be observed.
- » Stand up. Do not sit down, otherwise it may turn into a meeting.
- » Everyone participates in a huddle – groupings should be appropriate to relevance.
- » Do not try to solve problems during this huddle.



SAMPLE HUDDLE AGENDA

- » What's up (2 – 5 Minutes)
 - Wins – Specifics about activities, meetings, accomplishments, personal occurrences, noteworthy news from customers, etc.
 - Progress you will make on top 1 or 2 priorities today. Be specific in how you will measure success.
- » Daily measurement indicators (2 – 5 Minutes) – Day before. If you do not have a daily KPI, how did you measure and know yesterday was awesome?
- » Where are the obstacles/stucks that are being controlled/influenced by others? (2 – 5 Minutes) Where's the bottleneck?

Optional Agenda Ideas:

- » Inspirational message
- » Review one core value or purpose, product, code of conduct, or best practice.
- » Mention organization-wide issues, wins, etc.
- » Roll out today's strategy.



WEEKLY MEETING (30 – 90 MINUTES)

PURPOSE:

- » Focus – Collaboration
- » Executive to provide:
 - Perspective
 - Group coaching and inspiration
 - Recognition of effort and performance
- » Keep attention on quarterly goals, rocks, and personal priorities.
 - How is the organization performing against expectations?
 - Evaluate progress rocks and priorities.
 - What progress will be made this week?
 - What midcourse actions are needed?
 - Tap the collective brainpower of the team in addressing one or two main topics.

BEST PRACTICES:

- » Start on time.
- » Start out on a positive note and recognize good performance and achievements for the past week.
- » Limit time for reviewing data to 20 minutes.
 - Allows you to share enough internal and external data to see patterns and trends.
 - Your purpose is to isolate the 1 thing to solve as a team. If that is known, limit the data.
- » This meeting is not meant to address the dozens of issues that have accumulated over the week.
- » Constructive conflict is encouraged. If there is no conflict you wasted your time.
- » If no new decisions are made and action plans created in the meeting, you wasted everyone's time.
- » Make sure a topic is finished, decisions are made, and action plan is completed before you move on.
- » Same time and day every week. Make it sacred.
- » If you know the agenda items prior to the meeting, let everyone know so they can come prepared.
- » Identify information needed and if possible share information prior to the meeting. Everyone should be given proper time to analyze data if expected to come prepared for the meeting.



SAMPLE WEEKLY MEETING AGENDA:

- » Good News (5 Minutes) – personal or professional
- » Priorities and the Numbers (10 Minutes)
 - Spend time on “Yellow” and “Red” priorities to understand how they will become “Green” – This is about accountability (no solving here).
 - *Create parking lot items where appropriate.*
 - Agree on progress to be completed in the next 7 days.
 - Review the metrics/KPI dashboard (no solving here).
 - *Create parking lot items where appropriate.*
- » Customer / Employee Data (5 Minutes)
 - What issues are cropping up day after day? Add to parking lot.
- » Add potential discussion items to parking lot and make a full list before deciding what to resolve as a team. Rank order the list. (5 Minutes)
- » Collective Intelligence to solve items on the list (25 – 50 Minutes)
- » “Who, What, and When” review and summary
- » One phrase close – end your weekly meeting asking everyone to sum up with a word or phrase of reaction.

Other Potential Agenda Items:

- » Discuss a potential partnership.
- » Major event is coming up, and you need to make some decisions.



MONTHLY MANAGEMENT MEETING (1/2 TO FULL-DAY)

PURPOSE:

- » Focus – Collaboration
- » Instill the DNA (Purpose, Knowledge, Values) to anyone who supervises someone.
- » Keep attention on quarterly goals, rocks, and personal priorities.
- » Tap the collective brainpower of the team in addressing one or two main topics.
- » Strengthen the team, and hold everyone accountable.
- » Enhance Leadership Learning (leadership, marketplace, product, or industry learning).

BEST PRACTICES:

- » Hold as soon as financial data is available.
- » Do not try to address the dozens of issues that have accumulated over the month.
- » Constructive conflict is encouraged. If there is no conflict you wasted your time.
- » If no new decisions are made and action plans created in the meeting, you wasted everyone's time.
- » Open book management is encouraged.
- » Each department head should provide some good data helping everyone understand the state of affairs in their department.
- » It is usually a good idea to know which topics will be discussed and worked on at the monthly meeting. Choose 1 or 2 topics that are difficult chokepoints that everyone can work on. Notify people of the information needed and desired presentations.
- » Should be the same day every month.



SAMPLE MONTHLY MANAGEMENT MEETING AGENDA

- » Opening to meeting
 - Conversation Starter or Brain Teasing Exercise
 - Good News – Personal or Professional from Your Team
- » Executive to provide:
 - Perspective
 - Recognize effort and performance
- » Performance Review:
 - Key Performance Indicators – Patterns, Action plan for Yellow and Red
 - Goals – Red, Yellow, Green?
 - Financial Statement update (as current as available)
 - Forecast
 - *Do we feel good about the quarter forecast?*
 - *If we are off track, what would it take to get back on track?*
- » Operational Review and Commitment to Priorities:
 - Each leader presents the following:
 - *Report, Update Progress – Top 5 Priorities*
 - *Show status of action plan (no action plan is unacceptable).*
 - *Red and Yellow (What is your plan to Green?)*
 - *What KPIs concern you?*
 - *What issues do you see recurring with employees?*
 - *What issues do you see with clients?*
 - *What issues do you see between internal departments?*
 - *What cultural issues do you see?*
 - *What issues could you use help with?*
- » Collaborate on 2 business issues as a management team.
- » Learning segment
- » Communication
 - Review and summary of “Who What When?”
 - What needs to be communicated from this meeting to others?
- » Closing Comments:
 - How did today’s meeting go?



ANNUAL/QUARTERLY LEADERSHIP MEETING (2 DAYS)

PURPOSE:

- » Validate and strengthen strategy.
- » Step back and reflect how we did this quarter.
- » Decide next quarter priorities.
- » Keep our eye on cash and financial stability of company.
- » Hold team members accountable.
- » Enhance executive learning.

BEST PRACTICES:

- » Stay focused on the big picture.
- » Remember the Pareto Principle – 80 / 20 Rule
- » Create a “no-do” or “do-later” list.
- » Consider growth, waste, and relationships.
- » Make sure that most of your organizational energy will focus on your number 1 priority/issue/bottleneck.



SAMPLE QUARTERLY EXECUTIVE MEETING AGENDA:

- » Opening:
 - Opening emotion
 - Bright spots for the quarter
- » Have a forum to continually discuss company strategies
 - Discuss emerging trends and their impact
 - Discuss how to better drive core ideology and brand promises
 - Review, challenge and further crystallize strategy
- » Leadership Team
 - Discuss how to improve leadership team function
 - Discuss how to improve organization accountability
 - Discuss how to improve culture
 - Leadership learning segment
 - Review talent scorecard
- » Last Quarter Review
 - Key Performance Indicators – Patterns, Action plan for Yellow and Red
 - Goals – Red, Yellow, Green?
 - Financial Statement update (as current as available)
 - Forecast
 - Do we feel good about the quarter forecast?
 - If we are off track, what would it take to get back on track?
- » Operational Review and Commitment to Priorities
 - Each leader presents the following:
 - *Review personal priorities, goals, KPIs, critical numbers.*
 - *Which ones were Not Achieved? – What are the consequences? Carryover?*
 - *What KPIs concern you?*
 - *What issues do you see recurring with employees?*
 - *What issues do you see with clients, with specific attention to customer service issues?*
 - *What issues do you see between internal departments?*
 - *Discuss obstacles and challenges that may prevent us from achieving annual initiatives and goals.*
 - *What resources do you need and why?*
- » Planning
 - Establish goals – 5 minutes
 - Develop quarterly priorities that support the new annual initiatives.
 - Develop personal priorities for each member of the team.
- » Communication
 - Theme
 - What do we want to communicate to our employees? How?
 - How often will we update everyone?
- » One-phrase Close