

Meeting Agendas

Daily Huddle (2x per week, 8 – 8:15 a.m.)

- What's up with customers, suppliers and/or employees?
- What's on your plate today?
- Is anyone stuck and who can help them?
- One thing that "must happen" today for each person

Weekly Meeting (60 – 90 minutes)

- Good news check-in
- Deliverables from last week
- PM Review
- Report out on Sales
- Top 3 short-term priorities
- Customer and employee hassles/headlines
- Issues/solutions
- To do list
- Work on a quarterly Priority
- Commitments/cascading messages
- Wrap – one sentence close

*One to one project managers with each PM on their projects

Monthly Meeting (2 hours)

- Good news check-in, what's working/not working
- Smart & critical numbers
- Report out on Sales
- Update on each quarterly Priority by owner
- Scorecard review
- Team course corrections on Priorities if appropriate
- Work on a quarterly Priority
- Opportunities list
- Commitments/cascading messages
- Wrap – one sentence close

Commitments and Cascading Messages:

- What decisions did we reach during today's meeting?
- Who needs to know about those decisions?
- Who will communicate those decisions, how and by when?

Quarterly Meeting (full day)

- Good news check-in
- Review previous quarter Priorities, metrics and lessons learned, deliverables
- Revisit one year Initiatives for open items
- Compile hot issues for coming quarter
- Prioritize top 3 to 5 Priorities with accountabilities and metrics
- Teamwork on any strategic topics
- Commitments/cascading messages
- Wrap – one sentence close
- Dinner

Annual Meeting (two days)

- Good news check-in
- Review previous quarter Priorities, metrics and lessons learned
- Review previous year – Initiatives and metrics, positives, negatives
- Compile successes over past year
- Revisit/set long-term strategic goals
- SWOT review
- Set 3 year Key Focus Areas
- Set 1 year Initiatives
- Compile hot issues for 1st quarter
- Prioritize top 3 to 5 Priorities with accountabilities and metrics
- Commitments/cascading messages
- Wrap – one sentence close
- Day 1 - dinner