

The 15-Minute Guide for Leaders
to dramatically makeover your meetings.



MEETING TEMPLATE

***Be More Productive,
Get Faster Decisions
And most importantly,
Enjoy Shorter Meetings***



***“How am I ever
going to get work
done if I’m
in meetings
8 hours a day?”***



Meetings are the necessary evil, right?

As an executive, you run from one meeting to next and only at the end of the day do you think back on all those meetings and you can't remember what decisions or solutions were completed without necessitating a follow up meeting because today's meeting went off in the ditch during discussions.

Jeff Bezos at Amazon has long banned PowerPoint as the go-to meeting format in favor of a briefing document that clearly drives to the desired meeting outcome.

Most meetings are usually driven by the meeting organizer. All those in attendance tend to simply follow along until called on. You must structure your meeting discussions so that a good outcome is reached. Here's a proven template to utilize to plan all your meetings going forward.

HERE'S HOW IT WORKS:

- ❖ One issue/topic per briefing document – usually one topic per meeting.
- ❖ The meeting leader should complete (at least) Steps 1-3 prior to the meeting.
- ❖ The template contains 6 sequential steps – outlined in the following two pages.
- ❖ Write 1-3 short paragraphs for each section. The entire document shouldn't exceed two typed pages, single spaced.
- ❖ Start each meeting with all attendees reading the briefing for the first 5-10 minutes in silence. This is key for everyone to absorb the issue and prepare for discussion.
- ❖ The meeting leader facilitates the discussion according to the steps in the meeting template. Steps 4-6 will usually come out of the meeting discussion.
- ❖ You should be able to drive to decisions faster and with better clarity.

Meeting Topic: _____

Attendees: _____

Date: _____

STEP 1:

The Challenge.

This defines **"where we are now"** and is always stated in terms of either **a problem** or **an opportunity**.

*Example: "The Everest project is in jeopardy of meeting its go-live date due to the system build having an initial unrealistic time projection. We can probably make the current date if we eliminate much of the desired functionality for the initial go-live date."
(the challenge)*

STEP 2:

The Undesired Outcome.

This defines **"where we don't want to be"** what will happen if the problem or opportunity is not addressed.

*Example: "If Everest is delivered late it will impact our project budget and add cumbersome and time-consuming work-arounds in several of our key departments for many months until more functionality is ready in subsequent releases."
(the undesired outcome)*

STEP 3:

The Desired Outcome.

This defines **"where do we want to be"** which should obviously be better than the undesired outcome.

*Example: "Obviously, we want to get the project back on schedule and give end users the functionality they need."
(the desired outcome)*

STEP 4:

The Proposed Solution.

This defines what must be done to avoid the undesired outcome and achieve the desired one.

Example: "We have two key options... (A) reduce functionality to end users and make the go-live date but that will necessitate several departments needing manual work-arounds until full functionality is implemented and the cost of that is \$X, (B) push the date out to accommodate full functionality and look for ways to fund the project extension. **After assessing the situation, B is the best solution because _____.** (proposed solution)

STEP 5:

The Risk Remover.

Why the proposed solution is likely to succeed and unlikely to fail.

Example: With a delayed go-live date, allowing the project to implement full functionality for our employees (end users) we will not see the costs of the extra temp hires, onboarding, work errors, low employee morale and potentially high customer dissatisfaction due to the required manual interventions our departments would need to implement in the absence of full functionality. (risk remover)

STEP 6:

Decision and Execution.

The end game.

Example: "To accomplish this we need to pause for 3 weeks to re-assess the build completion timeline and determine the additional funding we will need to present to leadership." (call to action)

A quick case study...

I've (as we all have) seen plenty of meeting go off the rails and end with no productive outcome. Not all meeting leaders are trained in facilitation skills to get the most out of their meetings (and it would be awesome if they were).

A recent client, was so meeting-centric the day often started with 7:00am meetings on the phone before everyone even arrived at the office. Most meetings with this client don't have a clear agenda attached to the invite; allowing for invitees to understand why they were invited.

I immediately saw the pattern...one person would ask a question or grab onto one bullet in the PowerPoint on the screen and the discussion was taken off into left field for most of the meeting time. This also necessitated follow up meetings to get to a solution. Managers complained that they were wasting so much time in ineffective meetings that they were about to pull their hair out.

I had read about Bezos' meeting format and really thought a version of what Amazon adopted would help this client.

We put it into action and discovered it accomplished:

(1) getting all meeting attendees on the same page at the same time with the first few minutes of reading silently together, (2) keeping the discussion on track by following the specific steps, (3) driving to solutions better, (4) reduced the number of needed follow up meetings.



Gretchen
Asher

<http://www.TheEssentialCEO.com>
Gretchen@TheEssentialCEO.com
Tel: 206-257-3822



We help organizations develop **IN-HOUSE** consultant-level Change Management capabilities.

This *Meeting Makeover* Template is a topic in the ongoing **15-Minute Guide for Leaders** Series by The Essential CEO.

We have nearly 3 decades of experience leading change in large corporations. This Series contains easy to consume templates and is designed for immediate use by leaders to create sustainable change in their organization and company.