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## The Meeting Rhythm: The Heartbeat of the Organisation

To move faster, pulse faster.

At the heart of a team's performance is a rhythm of well-run daily, weekly, quarterly, and annual meetings.

These meetings bring focus and alignment, provide an opportunity to solve problems more quickly, and ultimately save time. They also address the #1 challenge people face when they work together: communications.

It is a rhythm of communication that drives alignment throughout the organisation. Regular meetings act as placeholders in everyone's calendar.

This rhythm of meetings shouldn't require more than 10% of a standard workweek for senior leadership, 5% to 7% for middle managers, and 3% for frontline staff. This rhythm is sufficient to manage the business.

### More Frequent Meetings

- Many companies have quarterly and annual meetings.
- Having more frequent routines makes it easier to attain goals. This is why the daily, weekly, and monthly meetings are critical. They drive the deliverables outlined in the less frequent meetings, with each meeting building on the next.
- Plus, teams need regular, face-to-face huddles to discuss new opportunities, strategic concerns, and bottle necks as they arise.
- The faster you're growing the faster your meetings should pulse.

### The Powerful Advantages of Meeting Regularly

There are two main arguments for not meeting regularly (especially for the daily huddles). These are:

1. We don't have the time: If your meetings follow our agenda, they save time. Because everyone is together in a daily meeting, things get communicated quickly and accurately.
2. We see each other all day anyway: Bumping into each other all day doesn't substitute for tightly focused team discussions.

Casual encounters fail to take advantage of the three most powerful tools a leader has in getting team performance.

The three most powerful advantages of meeting regularly are:

1. Accountability: **Peer pressure**
2. Organisational Learning: **Collective intelligence**
3. Clarity and focus: **Clear communication**

By holding one-on-one conversations with their team members in lieu of a weekly meeting, leaders lose these advantages.

Meeting in a group, takes the heat off the leader and creates peer pressure that increases the rate of deliverables.

Last, holding a team meeting means that everyone is hearing the same information. You don't have to repeat the same message three or four times in one-on-ones or casual conversations.



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### **Rockefeller Habit Number 3: Meeting Rhythm**

If you are not familiar with the Rockefeller Habits, you can go to: <https://gazelles.com/resources/growth-tools> for a free copy.

This rhythm of meetings is designed to support cascading communication around the priorities and metrics-driving strategy. Specifically:

- **The annual meeting.** At this one or two-day offsite meeting, leaders update the Strategic Plan and other Growth Tools and establish the next quarterly and/or annual theme. The leadership team spends time outside of the business working 'on', not 'in' the business.
- **The quarterly strategic meeting.** A half to full day meeting at the end or beginning of each quarter. In this meeting, the team review the previous quarter's performance and resets the priorities for the following quarter. If the entire team is not involved in this meeting, the leadership team meet should share an update of the new plans with all employees in a 45-minute meeting. (there are 3 quarterly meetings as 1 gets done during the annual meeting)
- **The monthly management meeting.** A 1 hour to half day meeting, in which all senior, middle management and frontline managers come together to learn and collaboratively address one or two big issues. It's also designed to transfer (DNA (knowledge, values, approach) from upper to middle management. (there are 8 monthly meetings as 3 are taken by quarterly reviews and 1 in the annual meeting)
- **The weekly meeting.** A 60 to 90 minute discussion to review progress on the quarterly priorities and tap the collective brainpower of the team in addressing one or two main topics. This meeting also provides a time to discuss the market intelligence gathered that week from customers, employees, and competitors. Repeated patterns of discussion determine the one or two main issues for the monthly meeting.
- **The daily huddle.** A 5-15-minute meeting to discuss tactical issues and provide updates. This will help you avoid minor train wrecks and to take quick advantage of unforeseen opportunities. Normally, a daily huddle saves everyone an hour or so of needless email updates and ad hoc interruptions. Issues that emerge drive the main topics for the weekly meeting.

**NOTE:** Note that the more frequent gatherings draw context and continuity from the longer and more strategic planning sessions.



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## **The Daily Meeting: The Huddle**

### What Kills the Daily (and Most) Meetings?

In a word, generalities! As teams tell stories and share information, it's critical that they include specifics. We need to hear names, numbers, dates, issues, and concerns if our brain is going to make the kind of connections that make this process powerful.

- **Timing** – Set the start of the daily huddle at an odd time (like 8:08). People are more likely to be on time. Start the meeting on time, whether everyone is present or not. End on time. Plan 1 minute per person. Choose whatever time best fits the rhythm of the business.
- **Setting** – Stand up – it'll help to keep the meeting short.
- **Who Attends** – the general rule is to have more people in fewer meetings, rather than fewer people in more meetings. In general, frontline employees will be in only one daily huddle, and anyone in management will be in two: one with their direct reports and one with their peers and leader.
- **Who Runs the Daily Meeting** – Pick someone who is naturally structured and disciplined to keep meetings running on time. Suggest “take it offline: whenever people get off on a tangent that doesn't require everybody's attention.
- **The Agenda** – The agenda should be the same every days and it's just three items long, with five minutes maximum per item:
  1. **What's up** (in the next 24 hours)? Be very specific. The idea is to let people detect conflicts, crossed agendas, and missed opportunities immediately. These updates should relate to key activities, meetings, decisions etc. NOT a recitation of someone's daily schedule.
  2. **What are the daily metrics?** You are looking for patterns and trends. Since it generally takes six data points to constitute a trend, it's going to take months to see patterns if you look at metrics only every 30 days.
  3. **Where are you stuck?** This is the most important agenda item. You want members to bring up constraints and concerns that would prevent them from having a great next 24 hours. The brutal facts need to be shared, and the leader needs to see a pattern of “stucks” to understand what underlying issues must be addressed. Verbalizing is the first step in solving problems, because until the mouth starts moving, the brain won't engage. Second, you want to focus your team's energy on breaking through constraints. The only people who don't get stuck are those who aren't doing anything or are so stuck that they don't know it.
- Avoid checking on whether someone did something the previous day as team members will feel micro-managed.



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## **The Weekly Meeting**

If the daily huddles are functioning well, they will lead to immediate action on scores of issues that would otherwise clog up the weekly meeting.

- The idea of the weekly meeting is to keep everyone focused on the #1 priority – the big rocks supporting that mission.
- You want to tap the collective intelligence of the team for 30 to 60 minutes on one or two important topics. This affords the group an opportunity to resolve 50 to 100 important things in a year.
- Pick one morning or afternoon and host ALL of your functional and project meetings back to back. This allows everyone to get in a meeting mindset and flow and frees senior management to spend the rest of the week out in the marketplace.
- The Schedule – Schedule the meeting for the same time, same place each week. Set aside 30 minutes for frontline employees, 60 to 90 minutes for middle and executive teams.

## **Suggested Agenda**

**Good News - 5 to 7 minutes** - Have everyone share a SPECIFIC personal and business good news story, from the past week. This is a way to counter the negativity of these meetings, since they are mainly focused on addressing challenges, and helps people begin to see the good, not just the bad. It's also a great way to get to know each other better and to give each other a pat on the back. This may feel awkward at first, but it's important that everyone participates.

**Who/What/When Review - 2 to 5 minutes** - The leader should go over the list and confirm the completion of the accountability items. If something is not completed a new date is selected or, if no longer relevant, the item is removed. The Who/What/When is always done as a team to show the team who is living up to their commitments.

**The Numbers - 5 to 10 minutes** - Go over individual or team weekly measures of productivity. Don't get hung-up in conversation. Just report the numbers. You will see trends in the data better if every team graphs their weekly measurements and shares them in the meeting. The numbers come from your individual goal metrics, the quarterly goals, the Profit X numbers and any other critical business number the management team is monitoring.

**Customer & Employee Feedback - 10 minutes** - Go over the Hassle Logs. Again, don't get hung up in conversation, instead, look for recurring issues or concerns that the team or its customers are facing day in and day out. Choose one issue, get to the root cause, and assign a person or small group to explore it.

**A Rock, or Single Issue - 10 to 30 minutes** – A big mistake made at weekly meetings is covering everything every week. As a result, the team deals with issues on a shallow level and never focuses its collective intelligence for a period of time on one issue. The key is focusing on a large priority for the quarter, the ROCKS for the quarter. Make sure to assign the accountabilities on the Who/What/When.

**Who/What/When Review - 2 to 5 minutes** - The leader confirms and summarizes the Who/What/When commitments made by each participant in the meeting and all the commitments due in the next week.

**One Phrase Closes** - Take turns having everyone say a word or phrase that represents how they feel at that moment about the meeting.



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### **Weekly CEO One-Pager**

- Many CEOs also send out a weekly one-pager to all employees updating them on the status of the #1 Priority and other significant developments inside the company and the industry.
- Employees want to hear from their top leader and appreciate the sense of being on the inside provided by this kind of report.

### **The Monthly Manager Meeting**

- Unless the senior team instills its DNA (knowledge and values to make a good decision) in everyone from the middle managers on down, the top leaders will find themselves increasingly overwhelmed by the demands of a growing business.
- Doing this requires one simple routine: a well-structured, monthly management meeting that includes everyone who supervises or manages anyone in the business. It should be focused on learning, sharing, and problem solving vs. just reviewing mind-numbing reports.
- The monthly meeting is a time to really dive into a specific strategic company problem or issue. Generally it is a rock that was identified on our one page strategic plan in the quarterly session. The start of the meeting is similar to a weekly meeting but is followed by a more in-depth conversation of where you are with each of your quarterly rocks and objectives. The people presenting their rocks should be well prepared for delivering a presentation in the meeting.
- Don't forget the **WHO/WHAT/WHEN** sheet for the meeting, you are not there to chit chat but to effectively run the meeting and assign accountability to resolve rocks and get results.

### **Suggested Agenda**

**Good News - 5 to 10 minutes** - Have everyone share a SPECIFIC personal and business good news story, from the past week.

**The Numbers - 5 to 10 minutes** - Go over individual or team weekly measures of productivity. Don't get hung-up in conversation. Just report the numbers. Graphing the weekly measurements will assist the Team to see trends in the data.

**WHO/WHAT/WHEN - 5 minutes** - Quickly go over the WHO/WHAT/WHEN from the previous meeting and check items off the list.

**Customer & Employee Data - 10 minutes** - Go over the Hassle Logs. Don't get hung up in conversation. Just look for any recurring issues or concerns that the team or its customers are facing day in and day out. Choose one issue, get to the root cause, and assign a person or small group to explore it. Don't forget the WHO/WHAT/WHEN.

**Review of One Page - 30 minutes** - Go over the quarterly section of the one-page strategic plan and review the details of each of the key performance indicators. Each person will report on their rock and the CEO will give a report on where the organization is as a whole.

**Review a Rock - 30 to 60 minutes** - If someone is in the red or close to it, they need to give a detailed analysis of what they have done to move the rock and why they are stuck. The person in charge of the rock should then brainstorm with the group to overcome the challenges they're facing. This is an open forum to discuss the fine details of everything done to date and what actions need to be taken to overcome the barrier.

**Review a Rock II - 30 to 60 minutes** - Same as last item.



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**WHO/WHAT/WHEN - 5 minutes** - Quickly go over the WHO/WHAT/WHEN additions from this meeting and reconfirm the commitments in WHO/WHAT/WHEN format.

**Learning – 10-30 minutes** - Review a book by having, a leader presents a new procedure or have a Team member share a class they've attended. This is an opportunity for learning.

**One Phrase Closes** - Go around the room and ask everyone to say a word or phrase that represents how they feel at that moment about the meeting.

**NOTE:** *This is a 3 to 4-hour meeting, if effective.*

### **Monthly Town Hall**

- In addition to the weekly CEO one –pager, many top leaders host a monthly town hall meeting, at which they make a few key announcements and give employees an opportunity to ask questions and discuss issues important to them.
- One of the biggest mistakes a CEO can make, in the spirit of transparency and openness, is to share important changes and improvements with all the employees before briefing the middle managers.

### **Quarterly and Annual Planning Meetings**

- The main agenda for these half-day to two-day offsite planning sessions is to work through and update the Strategic Plan and Growth Tools. They provide the questions, focus, and agenda for these quarterly and annual planning sessions.