

EFFECTIVE MEETINGS

Good meetings save time and make you money!

"Gossip thrives in the absence of clear communication."

WHERE ARE YOUR MEETINGS RIGHT NOW?

Most meetings fall into one of two camps. Which sounds like yours?

⚠ REALITY NOW

- Talk fests — take too long, go off agenda
- Waste of time and money (\$\$\$)
- No one knows what's going on
- Frustration — why am I doing this?
- In the dark — lots of surprises
- Commitments not being met
- Operating in silos — their goals vs team goals
- Below the line (BED)

✓ WHAT WE WANT

- Predictable agenda — moves the needle
- Right information at the right time
- Progress — where are we up to?
- Who has to do what by when?
- Everyone singing from the same hymn sheet
- Accountability & transparency
- Above the line (OAR)

THE REAL PROBLEM

1

No Clear Communication

People don't know what's expected — before, during, or after meetings.
Nothing is confirmed in writing.

2

Unrealistic Expectations

"They should just know." But they don't. Clarity is your responsibility as the leader.

3

ASSUME = ASS – U – ME

Every assumption creates a blind spot.
Assumptions breed resentment, surprises and missed commitments.

HOW GREAT MEETINGS WORK



THE 5 QUESTIONS TO GET STARTED

What information do we need?

How can they use that information to make an impact?

2 Why do we need that information?

5 Who can influence the results?

3 Who needs to have access to that information?

THE GOLDEN RULES

"A good meeting is a short meeting."



Regular & Frequent

Regular frequent meetings are always better than long meetings.



Always On Time

Start on time. Finish on time. Every single meeting.



Follow an Agenda

Prepare it in advance. Share it before the meeting.



Clear Actions

Every meeting ends with: Who / Does What / By When.

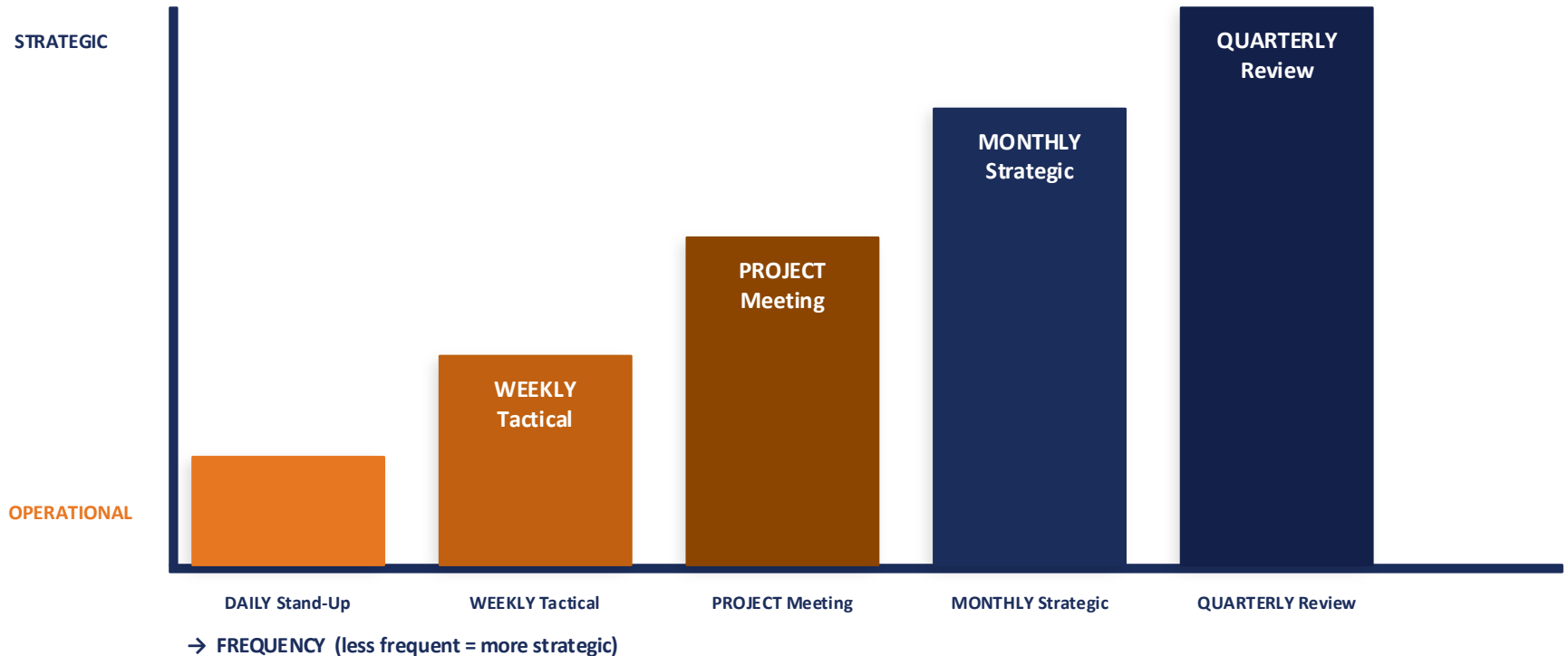


Accountability

First agenda item every week: review last week's actions.

YOUR MEETING RHYTHM — TACTICAL TO STRATEGIC

As meetings become less frequent, they become more strategic. You need both.



DAILY STAND-UP

10–15 MIN

10–15 minutes max — every business day

Quick Check In?

Quick check in — everything on track?.

Yesterday

What did the team achieve? Review what was done.

Today

Priorities, schedule — what are we achieving today?

To Do vs Achieve

Not just a list of tasks — what will actually get DONE today?

Issues / Flags

Sick employee, van off the road, customer not ready, supply issue, emergency — surface and solve fast.

WEEKLY TACTICAL MEETING

30–60 MIN

DASHBOARD

- Key numbers & KPIs at a glance
- Work in progress update

NEXT WEEK

- Future heads-up (Owner/Manager)
- Upcoming priorities

LAST WEEK

- What went well?
- What could be better? (Owner/Manager)

SAFETY / PROCEDURES

- 1 safety or procedure item (Everyone)

THIS WEEK

- Projects, tasks & overview (Owner/Manager)
- Resource & schedule overview

1 VALUE

- Lead by Owner or Manager
- Last week's score, this week's score
- What do we need to do to get it up by 1?

PROJECT MEETING & MONTHLY STRATEGIC

PROJECT MEETING

As needed

Specific projects with specific people

- Finance meetings
- Managers meetings
- Project-specific team meetings
- Review milestones, progress & blockers
- Assign clear actions: Who / What / By When

MONTHLY — STRATEGIC & TACTICAL

60–90 MIN

- Reporting overview
- Sales Results — GP and NP
- Debtors & Creditors
- Marketing results
- Progress on Projects/Big Rocks (On Track, Ahead or Behind)
- Staffing — who's away

QUARTERLY & 6-MONTHLY PLANNING

QUARTERLY REVIEW

½ – 1 DAY

- Quarterly review — how are we tracking?
- How are we progressing on Annual Goals?
- Update Annual Goals
- Planning updates
- Financials — Budget update & Cashflow
- Default diary review
- Marketing strategy update
- Selecting & Allocating Projects (Big Rocks)

6-MONTHLY PLANNING

1–2 DAYS

Rolling for the next 12 months (Dec/Jan and July/Aug)

- Personal Goals
- Business Goals
- Budget & Cashflow
- Pricing review
- Suppliers review
- Staffing — reviews & training

ANNUAL REVIEW — REFLECT & REFOCUS

REVIEW

the last 12 months

- What worked well?
- What didn't work?
- What surprised us?
- What did we learn?

PLAN

the next 12 months

- Set business goals
- Set personal goals
- Budget & cashflow
- Marketing strategy

REVISIT

your vision

- Re-visit your WHY
- Where are you headed?
- Does the team understand the vision?
- Adjust and recommit

"Review the last 12 months. Plan the next 12 months. Re-visit your vision."

YOUR NEXT STEPS

1

Answer the 5 questions for your business

2

Decide which meeting(s) you'll implement or improve FIRST

3

Write your first agenda and share it with your team

4

Set a recurring time in the calendar — and protect it

5

Review actions at the start of EVERY future meeting

Complete your worksheet — bring it to your next coaching session with Sam!