



# Integrated Meetings

## Meaningful Meetings That Get Real Results

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This guide includes excerpts from the book *Business Execution for RESULTS* by Stephen Lynch, President, RESULTS



**INTEGRATED MEETINGS** are one of the “Four Pillars” or Best Practices that are proven to produce extraordinary results. They’re distilled from decades of researching the greatest companies on the planet.

The “Four Pillars” are:

- A One-Page Strategic Plan
- Real-Time KPIs
- Integrated Meetings
- Integrated Collaboration

If a company or organization properly implements these, they are on the path to amazing success.



# INTRODUCTION

The essence of this meeting guide is: **How to make your meetings meaningful and brief.**

If someone asked you how you spent your time last week, would you honestly know how to answer? Most people would have to refer back to their meeting calendar or email inbox before giving an accurate answer.

In business, your team's time should be hyper-focused on your Strategic Priorities which flow out of your Strategic Plan. The reality is most companies lose focus and people start "chasing squirrels"—spreading their energy over many less important tasks instead of focusing on their strategic projects. **Meetings are where you can nip that in the bud.**

In this guide you'll learn how to run meetings the right way. We'll walk you step-by-step through our methodology for impactful meetings — based on over 20 years of business consulting experience working with thousands of clients around the world.

**Effective meetings drive execution. They help you spot problems and opportunities early. They're the point where all the analysis and decisions you've made connect with daily activity.**

— Stephen Lynch  
*President, Results.com*

# THE PROBLEM

## Unproductive, Ineffective Meetings

For twenty years we collected data from our clients, and one of our standard questions was, “**What wastes the most time in your business?**” The answer was overwhelmingly consistent. Our clients said, “Meetings.” *Harvard Business Review* matched our research in their 2014 article, “Your Scarcest Resource.”

Meetings get a bad rap. People hate them. They think that meetings are gigantic wastes of time. In 2011, Harris Interactive surveyed more than 2,000 workers about status meetings, and 70 percent said that status meetings don't help them accomplish their work.

### **THE FACTS** regarding Meetings:

**15%** of an organization's collective time is spent in meetings

**67%** of meetings are rated as “ineffective” by managers

**92%** of people admit multitasking during meetings

**Never again have a member of your company sit through one of these wasteful endurance sessions**



# THE PROBLEM



A Microsoft survey tracking office productivity contacted 38,000 workers around the world to identify “productivity pitfalls.” **Respondents reported that two out of every five days on the job were wasted. The main culprit: “ineffective meetings.”**

It doesn't have to be that way. If you want to become a great company, you have to hold productive meetings.

International best-selling co-author of *Full Steam Ahead*, Dr. Jesse Lyn Stoner, consults with businesses globally and often observes teams at work. That means that she attends a lot of boring meetings. On her fiftieth birthday, she found herself in what she says was the most boring meeting of her life. Here is the way she describes it:

“I was observing a four-hour team meeting of the company's president and his eight direct reports. Sitting around a table, one at a time, each person reported what was happening in his or her area. The president asked questions. The others listened until it was their turn. There was no real discussion.” The purpose of the meeting appeared to be updating the president, but that could have been done in a number of different ways. Stoner points out that the company missed an opportunity to tap into the collective wisdom and experience of the senior executives.

**This may surprise you, but we believe meetings can be the most productive and effective time you spend in business (if done right). How? Read on.**

# THE SOLUTION

## The 5 P's Of Productive Meetings

The fact is, people hate meetings because so many meetings are worth hating. Too many are boring and unnecessary. It doesn't have to be that way. **But the answer isn't to eliminate meetings; it's to make your meetings better.** Meetings can help you be more productive, not less. They can actually save you time instead of wasting it. Constructive meetings typically follow these "5 P's". In the "Integrated Meetings" section at the end, **we'll show you how to easily incorporate these five principles into every meeting.**

### PURPOSE

Every productive meeting has a purpose. **Participants should know what the meeting is for.** The purpose should be worth pulling people away from other productive work. It should be something that can be best accomplished by a group of people working together at the same time.

### PREPARATION

Preparation is one key to productive meetings. Every attendee should **come prepared with the right data and be ready to share** their perspectives in order to achieve the purpose.

### PROCESS

Productive meetings have **a clear process, defined by the agenda.** It should describe how participants will accomplish the purpose. Recurring meetings, in particular, should always have a standard agenda.

### PARTICIPATION

Productive meetings are characterized by **the participation of everyone present.** People should be at the meeting because they have something to contribute, and participating is how they contribute.

### PROGRESS

In a productive meeting, everyone should make progress. They should **leave the meeting better off than when they entered and have more clarity** around what everyone needs to do next.



# THREE CORE MEETINGS THAT LEAD TO SUCCESS



# #1: THE WEEKLY TEAM MEETING

**As a leader you have a few secret weapons to help you get things done—the Weekly Team Meeting is one of them**

When Alan Mulally took over the ailing Ford Motor Company in 2006, the company was losing \$83 million dollars...a day.

He immediately changed the way his team of corporate-level executives worked together, as Harvard Business School Professor Nancy Koehn describes:

“He eliminated all corporate-level meetings except for two he introduced: the weekly, mandatory business plan review, when the

## **Weekly Team Meeting**

Held..... Weekly

Duration ..... 1-2 hours

### **Agenda:**

- 1 Good News Story (both business and personal)
- 2 Team Goal/KPI Review
- 3 Team Projects Review
- 4 Parking Lot Discussion
- 5 Share a Core Values Story
- 6 Team “One-Phrase” Close

*See the page 10 for details on each of these Agenda items.*





senior team reported its progress on specific goals, and the special-attention review, when executives took up issues needing in-depth consideration. These meetings were the highway on which Ford's leaders drove change."

The weekly business plan review meetings were Ford's equivalent of what we call Weekly Team Meetings. Reviewing performance weekly keeps things on track and sets a fast but manageable cadence for the team.

**Here are 5 ways to improve your team meetings right now:**

- 1. Before the meeting, everyone needs to prepare** so they arrive ready to help make the time productive. Every person should review his or her performance, especially KPIs and Strategic Projects.
- 2. Update the status in your software dashboard of everything you're accountable for.** Try drafting a Twitter-length status update for each item to explain what is happening and what you are doing about it.
- 3. Prior to the meeting, everyone should also have clearly documented the next steps, or key tasks** that need to happen next to move each of their Strategic Projects and KPIs forward.
- 4. Hold your Weekly Team Meeting at the same time every week.** That helps avoid scheduling conflicts while it establishes a steady cadence for the team. You should use the same agenda at every Weekly Team Meeting.
- 5. Standardized agendas for routine meetings are powerful.** They make it easier for people to prepare. Team members can build meeting preparation into their work rhythm.

See the next page for details on each of the agenda items that are proven to make your Weekly Team Meetings successful in propelling your business forward.

## Weekly Meeting Agenda Details

### Good News Story

**Start on a positive note by sharing good news.** Have every team member share a personal good news story and a business good news story. Personal good news stories help team members learn about each other. Team members should use a key accomplishment from last week as their business good news story. Allow and enforce a one-minute-per-person limit, using the Twitter rule.

### Team Goal/KPI Review

**Review the numbers.** Check the status of KPIs (key performance indicators). Are they in the red, yellow, or green? This should be more than a simple report on results. There should be discussion and even challenges. How can you do better? What lessons can we learn? Confirm the one thing each person will do in the coming week to improve his or her numbers. Make sure this is documented as a specific task with a due date.

### Team Projects Review

**Review each person's projects.** What's the status of each one: red, yellow, or green? Confirm the one thing each person will do this week to move their projects forward. Make sure this is documented as a specific task with a due date.

### Parking Lot

**The Parking Lot** is the place on the agenda for items that don't fall under either KPI or Strategic Project performance review. These should be things that benefit from harnessing the collective brainpower of the team. *See page 11*

### Core Value Story

**Your Core Values are important** because they guide decision making and action when there's not a clear rule. Everyone needs to know what the Core Values are and what they look like in real life. You can help that happen by sharing a Core Values Story at each meeting. *See page 12*

### One Phrase Close

**Wrap up the meeting with the One Phrase Close.** Go around the room and have everyone share one short phrase that captures how they feel or what they're thinking at the moment. This serves as a quick temperature check on team morale. Some people will say something motivating and upbeat. Others might not—follow up with them later to see what's up.

## The Importance of THE PARKING LOT

There may be roadblocks that are preventing a person or the team from achieving their goals. There may be an “elephant in the room” that you all know is there but that’s not being discussed, that needs to be dealt with. Or there may be a key decision that requires input and debate by the team. This is where the Parking Lots comes in.

- **Rank Parking Lot items in priority order.** That way you’re tackling the most important issue first.
- **Set a time limit for discussing all the Parking Lot issues and hold to it**—even if you only discuss one item on the list. When that happens, you don’t want the other issues to either roll over to the next meeting or simply stay unresolved. Always either resolve an issue or assign a task to someone to take a specific action that will start the resolution process for items that you did not have time to discuss on the day.



Suggestions, Learnings, Blockages, Training...Capture the key ideas and problems throughout your Weekly One-On-One meetings, the previous meeting’s input and other data. Pick a couple of topics from the list and have the team wrestle them to the ground.

This is the part of the meeting where you’re most likely to have disagreement and heated discussion. That’s fine if the conflict you have is productive conflict.

You should have some disagreements. If there is no disagreement, the chances are that you’ve got a dysfunctional team. Disagreement, even argument, is fine if people are constructively and passionately debating the issues and concentrating on those issues, while respecting each other.

We need to make it safe for people to disagree with one another. Make it safe for people to disagree with the leader as well. Your goal is to make the very best decisions in the best interests of the company.

## The Importance of THE CORE VALUE STORY

Everyone is required to share a story of how someone else on the team has demonstrated one of your Core Values by their actions in the previous week. It's a great way to make the Core Values clear and also praise people who've demonstrated them in their work. We suggest the following format: **"I nominate (person) for living our Core Value of (Core Value)."** Then briefly describe what they did last week that demonstrated that value using a 140-character "Twitter Rule."

## CONSISTENCY Is Critical

The Weekly Team Meeting is a powerful way to keep things on track and moving forward. But they only gain strength when you do them every week. Let me warn you that you will be tempted to skip a week because there's too much work or there's a fire that needs fighting.

Don't give in to that temptation. Here's the experience of a client of ours, who owned and ran a small publishing company, in his own words:

"Part of our operating ritual was the Monday morning all-hands meeting. In about an hour and a half, we reviewed performance and what we needed to do in the coming week. My team knew that I was a fanatic about the meeting because I felt that it kept us productive and on track.

"When I was on an extended trip to South America, my team decided that they were just too busy to hold the regular meeting. In fact, they skipped the meeting two weeks in a row. Nobody told me that.

"When we held the first meeting after I got back, it was clear that things had gone off the rails. Key performance measures hadn't been met. Projects were behind.

"That was odd, because my team always did well when I was gone before. It took a minute or two before one team member told me what they'd done. I turned that into a lesson for them about the importance of that weekly meeting, but it was a lesson for me, too. **When you review every week, you catch problems when they're small, and it's easy to get back on track. Every week you miss, the problems get bigger, and getting back on track takes more effort."**

# #2: THE DAILY TEAM HUDDLE

**This is a “Stand-Up” meeting.  
Short...and held consistently at  
the beginning of every day.**

If you really want to accelerate the progress of your business, make sure each team starts the day with a stand-up Daily Team Huddle

Obviously, you don't want a long meeting because you want to keep energy high and get people back to productive work, but you also want to assure that the work of your team is concentrated and coordinated.

That's why people in several different industries seem to have simultaneously started holding short meetings at the start of

## Daily Team Huddle

Held..... Daily

Duration ..... 10-15 min. max

### Agenda:

*Everyone answers the first question, then they all answer the second, and so on...*

- 1 What are you working on today?
- 2 What is your number-one priority to get done before you leave work today?
- 3 Any roadblocks?
- 4 “One-Phrase” Close?



every day or every shift. The meetings fall under various names and methodologies including “stand-up meeting,” “scrum”, and more. We prefer the term “Team Huddles.”

These meetings vary a lot in the issues they address and the specifics of their agendas, but they all have seven important things in common:

- **Set Time.** They are held at the same time and with the same agenda every workday or every shift.
- **Don't Wait.** If someone is late, start on time. Don't wait for late attendees.
- **First Off.** They are held at the beginning of the day or shift.
- **Everyone Attends.** Everyone in the work group or team is expected to attend (or call in if they can't attend in person).
- **Stand Up.** Everyone stands during the meeting. This keeps the meeting short and keeps everyone focused.
- **Short.** The meetings are short and sweet...10-15 minutes at most.
- **Stick to the four question agenda.** Don't wander off on tangents or try to solve big issues. Schedule a separate meeting if necessary for save it for the Weekly Team Meeting.



A stand-up Daily Team Huddle is a great way to keep everyone on the team feeling connected and engaged. Everyone stays up-to-speed on progress and sees how each team member is contributing to the team goals and KPIs.

# #3: THE WEEKLY ONE-ON-ONE

**Meet with every one of your direct reports, one-on-one, every week...it's what real leaders do, and it's worth it!**

At most large companies, “performance management” or “performance reviews” involves two things: reviewing a job description that usually includes some hiring requirements, and an annual or semi-annual performance appraisal.

There are way too many problems with this “standard protocol:”

- There is no immediate feedback to help improve unsatisfactory performance.

## **Weekly One-On-One Meeting**

Held..... Weekly

Duration ..... 30 min. max

### **Agenda:**

- 1 KPI Review
- 2 Action Items
- 3 Roadblock Support
- 4 What's Up?
- 5 Observations
- 6 Good News

*See the page 17 for details on each of these Agenda items.*



- Positive feedback is delayed when performance goals are met, which can cause disengagement.

But there are better ways to manage performance. For example, if you use the Results.com software platform, the window into performance is constant and feedback can be immediate and in context with what is or isn't happening.

The methodology you've been learning in this guide helps people stay on track and succeed. It helps everyone get very clear on what needs focus and on how performance will be measured. Very few companies do anything like this, but it's critical to individual and team success. It's the team leader's opportunity to review individual performance with the same discipline and rigor as team performance.

## One-On-One Meeting Best Practices

- Meet with every one of your direct reports, one-on-one, every week.
- Choose a location where you will not be disturbed.
- Don't allow distractions from your phone or computer.
- Your meeting should take no more than a 30 minutes.
- Block out this time in your calendar and make sure you keep these appointments every week.
- As a manager, your number-one task is supporting your people.



Establish an agenda and time limit, and stick to them. Keep the meeting brief and focused.

### BEFORE THE MEETING:

Prepare. You and your team member should show up with the updated information you need to discuss the current reality.

### AFTER THE MEETING:

Follow up to make sure each task gets checked off as done. You get what you inspect. Holding people firmly accountable for honoring their commitments is crucial if you want to create a high-performance culture. This is not micro-managing. Give the person the freedom and autonomy to go away and determine how best to achieve each task, but follow up to close the loop and make sure it got done.



## Weekly One-On-One Meeting Agenda Details

### KPI Review

Review performance. Briefly discuss each project the individual is accountable for and get a status update. Briefly discuss each Key Performance Indicator and Strategic Project the worker is responsible for and get a status update.

### Action Items

Agree on what will be done. Ask the person what tangible action he or she will take this week (and next) to move each goal forward or address any issues you have identified. Agree on the actions to be taken and capture these tasks in writing, including specific details and due dates.

### Roadblock Support

Remove excuses. Ask what support or resources they need from you to help them succeed. As a manager, you need to provide the resources and clear the obstacles from their paths so that the most important tasks get done. You also need to keep out of their way and not overwhelm them with too many demands or conflicting priorities. Shield them from distractions to create the time and space for the most important tasks every week.

### What's Up?

Ask if there are any other issues that they would like to raise. How are they feeling? Are there any minor grievances that are bugging them? What's going on in their lives right now? Take a sincere interest in them and their lives outside work.

### Observations

Share any issues or feelings you think are important. Performance reviews are not an annual event. Let your people know every week how they are performing, both in terms of the performance data and what you have personally observed. Let them know that you are on their side. Demonstrate your commitment to helping them succeed.

### Good News

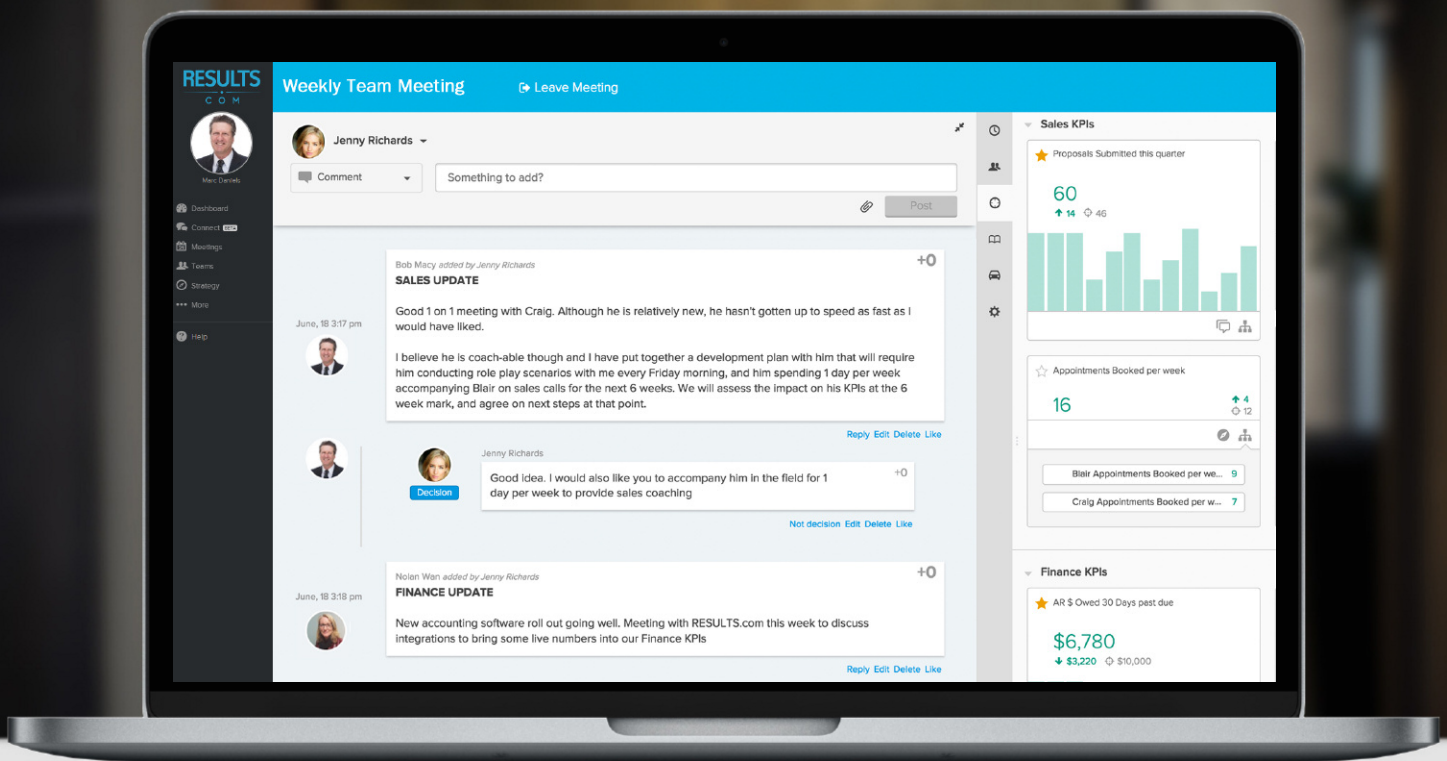
Finish on a high note. Find something they are doing well and acknowledge it. Praise is most effective if you commend the specific behaviors you want to see reinforced. You're not done yet. The purpose of this meeting is to improve performance, so there's one more important step.

# INTEGRATED MEETINGS

This is the “secret sauce” that instantly ties it all together

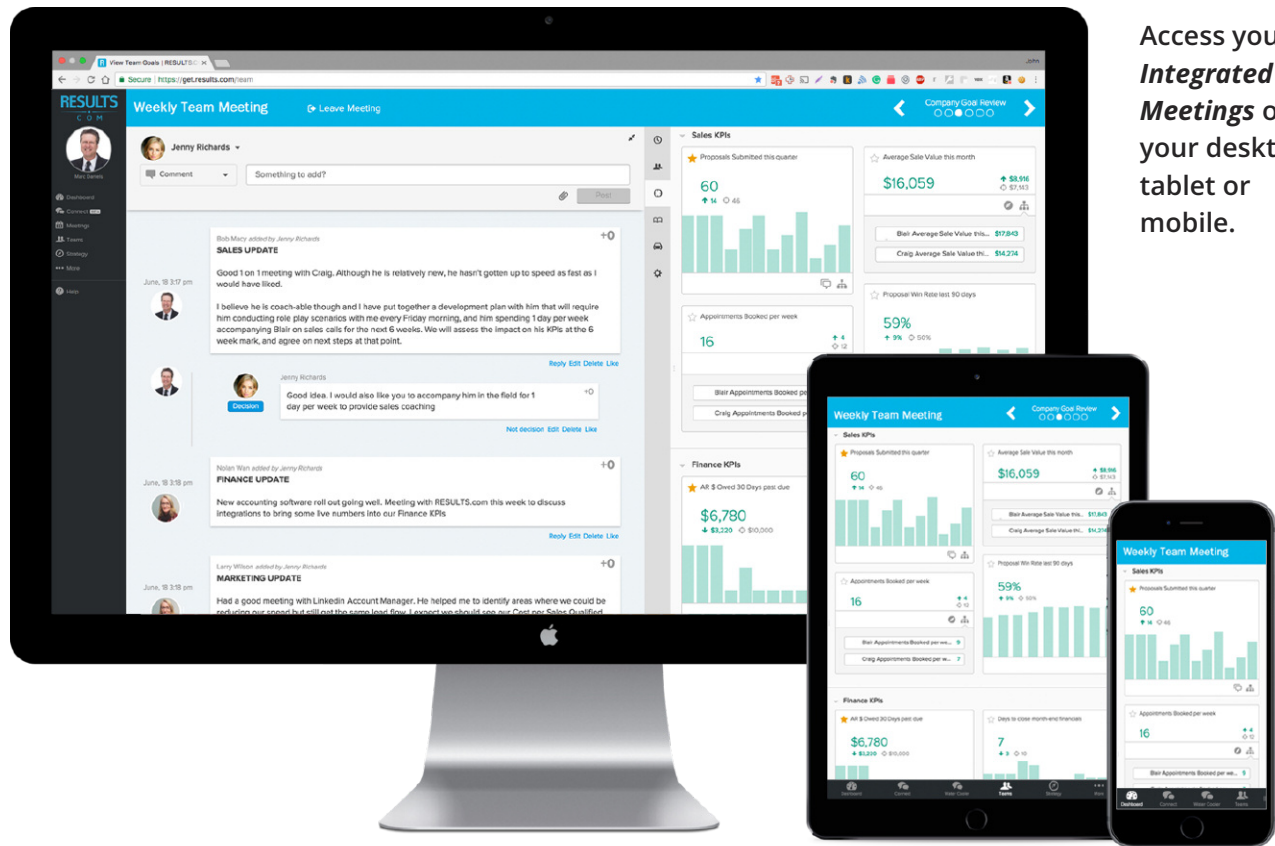
Meetings work best when they’re meaningful and brief. Each one should have a clear agenda. Each one should have instant access to the data measuring the most important goals and KPIs assigned to each person at the meeting. The RESULTS Platform does all of this automatically. **Simply click on your scheduled meeting and the agenda along with every goal, KPI and project for every team member (and the status of each) is automatically pre-loaded—tied directly to the agenda, ready to review and discuss in your meetings.** This is the essence of effective meetings, and the thing that will drive your business to real success.

The RESULTS Meeting Dashboard makes it easy to run effective meetings with everyone’s Goals, KPIs and Projects automatically integrated



# About RESULTS

## The World's Leading Business Management System



Access your *Integrated Meetings* on your desktop, tablet or mobile.

## Empowering Organizations To Execute Their Strategy and Grow

THE RESULTS SOFTWARE PLATFORM is based on what we refer to as the “Four Pillars.” Found in most successful businesses, they are the proven methods known originally as the “Rockefeller Habits.” Many popular management books expand upon them, while consulting organizations and consultants all over the world use them. The RESULTS system provides the software framework that makes the “Four Pillars” easy to implement, helping organizations across the globe successfully execute their Strategic Plans.

### The RESULTS Platform helps you succeed with these “Four Pillars”:

- One Page Strategic Plan
- Real-Time Projects & Key Performance Indicators
- Integrated Meetings
- Integrated Collaboration

**A proven system that's helped over 10,000 businesses improve their results**

# ACHIEVEMENT UNLIMITED & RESULTS

## YOUR PARTNERS FOR SUCCESS



**Clarity - Focus - Results®**

Achievement Unlimited, Inc. helps business leaders get off the insanity loop, successfully navigate change, unlock the potential of their human capital and increase productivity to build a results-based culture. Our process generates organizational clarity and facilitates planning, execution and leadership development as a way to transform organizations. We act as a growth catalyst, moving people and organizations out of their comfort zones toward their most important goals, driving growth and results.

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