

# Create a Team Plan For Better Meetings

Teams run this session to agree on plans for improving their meeting practice.

**Purpose:**

To create and agree on a plan for making our meetings more effective

**Desired Outcomes:**

- A shared sense of what success will do for us; why this matters
- Ideas about what could get in our way, and how we'll prevent those problems
- A one-month plan for changes we'll make to our meetings
- A defined list of next steps: who's doing what
- A date for the next meeting where we'll review results
- Enthusiastic commitment to the plan!

## Process

1. Intention: Why we need to focus on better meetings
2. Proposal: What we can change first
3. Pre-mortem: Based on our experience, what might go wrong and cause this project to fail? What do we need to do to prevent those failures?
4. Action Plan: Agree on who will do what next, and a date for checking back to see how it's going
5. Closing Review and Appreciations

## Timing

The key to an efficient planning meeting is to walk in with a draft plan ready to go. If you can share the agenda, the high-level goal, and a draft plan in advance, you can run this meeting in 45 minutes or less.

The plans created using this meeting work best when the resulting action is reviewed and refined in regular After Action Review meetings.

If you present these materials for the first time in the meeting and co-create the plan from scratch with your team, schedule 90 minutes or more.



## Step-by-Step Instructions

### Before the Meeting

Review the instructions below. You will need:

- A written intention for this work: what you hope to achieve
- A draft plan listing proposed changes to your meetings OR a process for co-creating this plan
- A way to edit this plan and review team calendars during the meeting

When you schedule the meeting, make sure everyone knows what inspired this focus on better meetings. Is your entire organization working to improve meetings? Have you recently attended training, read a book, or worked with a coach who suggested better meetings? Let your team know where this is coming from to reduce the risk that they perceive this as a personal indictment.

Include the meeting purpose, desired outcomes, and process outlined above in your meeting invitation. Then, ask everyone to come to the meeting prepared with their thoughts about ways to improve your team's current meetings..

### During the Meeting

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#### 1. **Intention: Why we need to focus on better meetings**

Greet everyone and frame the discussion by sharing a brief story about why now is the time to focus on better meetings. Then, share what you see as the most important near-term intention that your plan must achieve. What one, clear objective do you hope this team achieves first?

For example, do you want to reduce the amount of meeting time on everyone's calendar? Or improve your team's ability to agree on action items and complete them? Do you want to ensure everyone participates in meetings? This idea of intention comes from the military, and it roughly translates to the purpose of your action and desired outcomes you all want to see when the plan succeeds.

Here's an example:

*We need to create a short-term plan that reduces meeting time by 30%. (The Plan's Purpose)  
Reducing meeting time will let us complete more project work before the deadline and reduce the number of hours we're working at night and on the weekends. (Desired Outcomes)*

Ask your team to dig into this intention with these questions:

"If we achieve our objective, what else might that do for us? Why is it important for us to succeed?"

Invite a vigorous discussion about your team's short-term intention. Every change creates both challenges and opportunities, and this discussion will help your team connect with why this work is worth doing. You might also learn that your intention statement should be adjusted. If so, make those changes now.

When your team agrees that the intention is correct and clear, write it down and move to the next step.

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## 2. Proposal: What you want to change first

Next, discuss what specifically you think should change in your meetings.

**If you have a draft plan, share it now.** When you share your plan, present it in a form that can be edited during the meeting. Let the team know that this plan is a draft, and you expect to work together to improve it. You will need access to both your draft and a calendar, so your team can easily look at the meetings they have scheduled as they consider what the real impact of these changes might be.

**If you want to co-create a plan,** see the list of recommended co-creation exercises on the last page.

Either way, invite the team to ask clarifying questions and point out opportunities to improve the plan. Edit the plan during the meeting with their suggested improvements.

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## 3. Pre-Mortem

Research shows that running a pre-mortem can dramatically improve your odds of success. Teams use a pre-mortem to quickly think through the risks they'll face in an upcoming project. This process taps into our natural ability to spot all the problems and gaps in an idea, which most people can do much more easily than they can think up positive great ideas.

To begin, ask your team to list of all the reasons the plan you made might fail to achieve the desired intention.

For example, you might say:

“Take a look at this plan and imagine for a minute that we completely fail here. Why might we fail? List every reason you can think of silently on your own in the next 3 minutes.”

Set a timer while your team writes reasons you might fail in a private document or individual sticky notes. At the end of three minutes, invite the team to share the reasons they've written.

For example, you might say:

“Now, our goal is to get all these ideas out where we can keep them in mind as we plan. We don't need to debate or discuss these in any detail - we're just going to get it all out there. Let's go-around and share, one idea at a time.

When someone shares their idea, if you have something similar to that, speak up and add yours too. If you don't understand an idea, please ask for clarification - but again, clarifying questions only. This isn't the time for debate; we'll do that in a moment.”

Get all the ideas out where your team can see and discuss them. With all these ways you might fail in mind, you can create plans designed to prevent those mistakes and reduce those risks.

#### **4. Create an Action Plan**

Assemble a list of actions to be taken, the directly responsible individuals who will ensure each one gets done, and the expected completion date. Use your draft plan and ideas about possible problems to guide your work.

Your action plan should include tasks for documenting this plan and communicating it to everyone who will be impacted by the decisions you've made.

You will also need to assign someone to schedule a meeting in which you'll review your results.

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#### **5. Closing Review and Appreciations**

That was a lot of work! Review everything you've accomplished by checking that:

- Action items have clear descriptions, individual owners, and due dates when the group will check progress
- The communication plan for reporting out is complete and accurate
- Every decision is fully documented
- Everyone knows when they can expect to evaluate your results

Then, thank everyone for their time and effort to create the best possible plan. Now look forward to better meetings ahead!

## Alternative for Step 2: Co-Create a Plan

There are many ways teams can work through lists of possible plans and narrow these down to a few of the most promising ideas. The exercises recommended in this guide were selected because they're easy to understand and can be completed quickly by a single individual working alone or by a team working together. If you want to get your team involved in every step of improving your meetings, consider co-creating this improvement plan together during the meeting.

### Instructions For Using Start-Stop-Continue / Min Specs in this Meeting

#### **Step 1: Individual Start-Stop-Continue lists (4 minutes)**

Ask everyone to organize a list of meeting practices into Start/Stop/Continue categories, adding anything that will help the team achieve the objective.

Prompt: Given what we're trying to achieve:

- What do we need to Start doing right away?
- What must we Stop doing?
- What must we Continue doing?

#### **Step 2: Combine Lists**

Working in groups of 4 or 5, team members combine their lists into a single list.

- First, one person shares their list.
- The rest of the group adds anything they have on their lists that aren't on the first person's list.
- Then, the group discusses anything that they've put into different categories and resolves those disagreements.

If you have multiple groups, take a quick break. When you return, follow the same steps to combine each group's list into a single Stop, Start, Continue list.

#### **Step 3: Confirm that each Start/Continue activity is truly required.**

You want your plan to be as lean as possible. In rapidly-changing complex situations, you want to achieve your intention as efficiently as possible so you can free resources up to focus on other work.

With your combined list, look at each practice in the Start and Continue categories. Test that each one is absolutely necessary by asking these questions.

- If we didn't do this, could we still achieve our intention?
- If we did everything else except for this, could we still succeed?

Your near-term priorities are the items that pass this review (meaning you must absolutely do them to succeed).

NOTE: if your teams feel like they can accomplish more than the absolute minimum, that's fabulous! This meeting helps you focus and prioritize your work so that you have the best shot at achieving a critical, near-term goal. Once those minimum achievements are behind you, revisit your plan and take on the next challenge.

## Additional References

### **The Lucid Guide to Planning Meetings**

<https://www.lucidmeetings.com/meeting-types/planning-meetings>

This page includes additional templates and guidance for running planning meetings.

### **Commander's Intent**

"Manage Uncertainty with Commander's Intent" by Chad Storlie for HBR

<https://hbr.org/2010/11/dont-play-golf-in-a-football-g>

"Learning in the Thick of It" by Marilyn Darling, Charles Parry and Joseph Moore for HBR

<https://hbr.org/2005/07/learning-in-the-thick-of-it>

These two articles from Harvard Business Review both briefly describe Commander's intent. The second article focuses primarily on the value of After Action Reviews, which is the complementary meeting to this meeting. I highly recommend reading "Learning in the Thick of It" to get a feel for how excellent teams use these meetings to succeed in highly complex situations.

### **Exercise: Pre-Mortem**

<https://www.lucidmeetings.com/glossary/pre-mortem>

Gary Klein is credited with invention of the pre-mortem as we know and love it today. At Lucid, we use the pre-mortem exercise in several meeting designs because it works so well. This glossary entry provides a brief introduction to the exercise and links to several articles with more detail about the science behind this technique.

### **Exercise: Stop-Start-Continue**

<https://www.lucidmeetings.com/glossary/start-stop-continue>

### **Exercise: Min Specs**

<http://www.liberatingstructures.com/14-min-specs/>