Lucid Facilitator's Guide

CROSS-FUNCTIONAL TEAM WEEKLY UPDATE

This template is based on the weekly cross-functional team meeting we run at Lucid Meetings.

This meeting has two core functions: **1) keeping your team informed** and 2) helping them **connect positively** with each other and the business. For a team to work effectively, everyone needs to understand both the business mechanics and something about the people they rely on to get the job done.

At Lucid, we **keep the tone of this meeting casual**, and while we watch the time, we don't push it too hard.

Best For

Sharing status between different departments or teams

10 or fewer people

Fostering trust and connection

Contents

STEP-BY-STEP INSTRUCTIONS

Before the meeting

For this meeting to run efficiently, each person must add an update in advance. As the leader, you can update the agenda to **create a separate agenda item for each team member** and mark that person the presenter for that item. This makes it easy for them to see where to add any updates, and sets the order for reports during the meeting. **Give each team member 5 minutes** for their agenda item.

Be sure to **send invitations at least 1 day in advance**, and turn email reminders on. This will make sure everyone gets an email 10 minutes before the meeting, in case they forgot to add their update earlier.

Every team member gets a dedicated agenda item for reporting their update.

During the meeting

1

Welcome

Use this agenda item to get everyone online and **set the tone**. It's ok to give the group a few minutes to chat about their weekends and whatnot, but once everyone is present, don't let this go more than a few minutes.

The Welcome item includes a Smart List that will **automatically show a list of any open action items from previous meetings**. You'll talk about individual progress later in the meeting, so you don't need to go over the list in detail. It's here simply to remind people of open commitments and to give everyone something specific to look at that **focuses them on the work of the team** while waiting to start. For the Lucid team, this gentle reminder is usually all the push people need to complete those lingering tasks.

When you're ready, **click "Next >"** to begin sharing Victories.

2

Victories

This agenda item **anchors a team to the group's larger mission** by recognizing and celebrating success.

We put this item first to make sure we're all getting regular, **specific examples about what a good job looks like** in our company, and to ensure a time in a busy week to say thank you to those responsible.

Connecting to the Mission

What you celebrate tells your team what matters and how they should focus their efforts.

2
continued

If you know of a victory that should be shared, **ask the person most responsible to share the news** with the group. Then, ask the group to share any other successes from the past week. This might include:

- Great customer / member quotes
- Resolution of a major problem that's been plaguing the team
- Awards and recognition
- New sales
- New hires

Or whatever success looks like for your organization.

Don't feel like you need to make up a victory if there isn't one; it's more important that the team understands those actions and results that meaningfully contribute to the group's success.

Connecting to the Company

Multiple research studies show that **expressing sincere recognition** and public gratitude is one of the **most effective ways to motivate team members** and **improve employee retention**.

3

Announcements (2min)

Quickly go over any major announcements for the week ahead. These should be **reminders only**; never spring a major surprise on a group during a status meeting unless you're ready to throw out the rest of the agenda.

This topic should be very fast. **Feel free to skip it if there's nothing to cover.**

For example, we'll highlight new product launches, upcoming conferences, and office holidays: those events which will change who's available in the week ahead.

3 continued

If you find this is taking more than a few minutes, find other ways to help this group communicate between meetings so they don't need to spend meeting time getting basic information.

4

Team Updates

Before the meeting, you created a separate agenda item where each person entered their update to these questions:

- **Progress on commitments:** How did you (and your team) do on the plans you committed to last time?
- **Unexpected events:** What came up that you didn't anticipate?
- **Plans:** What are you (and your team) working on next?
- **Problems:** Where are you blocked and where do you need help?
- **Personal:** Is there anything non-work related you'd like to share?

Connecting to the Team

Sharing "Unexpected events" and "Personal" items gives your team **an opportunity to connect, build empathy, and establish trust**.

These questions make space to share frustrations and bad news which may have a big impact on the work, and require the support of the team.

More often, you'll hear funny stories that bring the team closer.

4 continued

If this is your **first time** using this template, **explain the process.**

For example, you might say:

> "We'll walk through everyone's updates in turn. When it's your turn, give us all a quick moment to read your update for ourselves. Then, point out any highlights if necessary. We'll take up to 5 minutes to ask questions and capture any new tasks that need to be assigned based on your report.
>
> When your time is up, we'll move to the next person.
>
> Everyone can take notes, so if you hear something important we should write down, go for it!"

When you're ready, click **"Next >"** to get started with the first person's update.

4.x

4.1, 4.2, etc. – Individual reports

Walk through each in turn, clicking **"Next >"** after each one.

TIP 1

You'll hear about problems and blocks from each person. **Don't try to solve problems in the meeting.** Instead, when problems come up, write an action item that makes sure someone is assigned to work on the problem after the meeting.

TIP 2

Some people may neglect to update their items before the meeting. Don't let this slide. **Requiring written updates builds accountability**, **ensures effective preparation,** and sets the team up for **consistently productive meetings with the teams they lead**.

5

Business Update (5 minutes)

Provide a high-level business update to help the team maintain a shared understanding of how their efforts fit into the larger organization and impact the company's bottom line.

At Lucid, we use this agenda item to review the company's financial status and a few key business metrics each week.

TIP

Do not go into all your business metrics and finances in this meeting. This agenda item **assumes that you've discussed the key business metrics and mechanics with your team in detail previously,** so they understand what these numbers mean and should look like before the meeting.

6

Closing

End the meeting by **reviewing any notes**. Then, confirm the date for the next meeting. Finally, **ask everyone to take a moment and review the meeting.**

> "There are a lot of ways to run this kind of meeting, and we all want to make sure this is a good use of our time. Before you leave, please quickly rate this meeting and provide some feedback."

After the meeting

Send out the follow-up email, which makes sure everyone gets their action items and a full report in their email, even if they couldn't attend the meeting.

COMMON PROBLEMS & HOW TO SOLVE THEM

Problem	Try
Updates take too long.	• Remind everyone about time at the beginning of the meeting. • Give a good example, and praise people who stick to the time. • Schedule meetings more frequently. You might have too much going on to wait a week!
People try to solve problems in the meeting	• Stop the discussion. • Enter an action item to work on the problem after the meeting.
Low energy	**Mix it up!** **Try a new template.**

RESOURCES FOR ACHIEVING MEETING MASTERY

From the Lucid Meetings Blog

- How to take notes in meetings
- 6 Ways to Make Sure People Are Listening in Your Virtual Meetings
- 5 Icebreakers for Distributed Team Meetings

Lucid Meetings How-To

Tips for Managing Status Meetings

Go deep! Read a book.

See our Better Meetings Booklist for some great options.

ABOUT THE AUTHOR

This template was designed and produced by the team at Lucid Meetings.

Learn more about us on our website.