

Lucid Meeting Guide to

Braintrusts: How to Lead an Advisory Council Meeting

This sensemaking meeting provides teams with feedback and insights they can use when tackling challenging projects. During the meeting, the team presents their challenge to the advisory council, where they can tap into the council members' "braintrust," or deep expertise. Council members ask clarifying questions, then provide candid feedback, access to resources, and options for the team to consider.

Best For



Teams ready to hear candid feedback

Gaining insights from outside experts

Discovering new ways to address complex challenges

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REASONS TO FORM AN ADVISORY COUNCIL

Advisory councils help companies and organizations navigate complex challenges.

Many organizations form advisory councils to work with the executive leadership team. They advise on company strategy, spot opportunities for growth, provide introductions, and point leaders to relevant resources. In Jim Collin's book *Good to Great*, he suggests that companies should convene [a monthly strategic council meeting](#) to accelerate their “flywheel” of success.

Companies can also form cross-functional internal councils that provide product and design advice to their peers. Pixar's famous Braintrust, for example, is a company-internal council used to help filmmakers tell excellent stories.

Organizations may also form councils to provide policy and practice advice during times of transition, like during a merger, creation of a new business line, or the return to work following the global 2020 pandemic. These councils may be comprised of people with relevant expertise from both within and outside the organization.

In short, when your team takes on a complex, high-stakes, and multi-month challenge, consider forming an advisory council to help you out.



Who Should be On the Council

Council members ask great questions, broaden the teams' thinking, and offer resources.

To achieve these goals, council members need these qualities.

1. A deep understanding of the problem space.

This could mean people who have done similar work for other organizations, those with specialized knowledge or skills, or people who represent the groups most impacted by the work at hand.

2. Familiarity with the organization and its operating context.

Council members should understand the resources available to the team and the organization's culture. They also need to understand any external requirements governing the team's work, such as regulations, industry trends, and timelines.

3. Listening skills and the ability to ask great questions.

The council should not attempt to solve the challenges brought to them. Instead, council members ask insightful questions, explore the merits of various options, and proffer candid feedback that the team uses as they decide on their next steps.

While you absolutely want smart advisors, don't include anyone who feels the need to be the smartest and loudest person in the room.

4. Connections or resources to share.

Seek council members who can provide strategic introductions, relevant studies, and access to resources.

5. No direct responsibility for making the final decisions or implementing the solutions.

Council members should not have any fiduciary or delivery responsibilities related to the challenges at hand. Their jobs aren't on the line here, which gives them the freedom to explore a wider array of options. This also ensures your council members have the distance needed to see opportunities that those "in the weeds" miss.



RULES OF ENGAGEMENT

Teams hold these meetings to gain critical feedback. That feedback can be hard to hear, especially when people aren't expecting it.

To prevent the most common misunderstandings that lead to hurt feelings, share your rules of engagement in your meeting invitations and at the beginning of the meeting.

If you don't have any rules, feel free to copy and adapt our examples below.

Council Members

Candor with kindness.

Ask the questions that need to be asked and offer honest feedback.
Always critique the work, never the workers.

Help others do great work.

You are not here to tell people what to do or solve the problem. Serve the people doing the work with questions, resources, and candid feedback that they can use to craft the solution.

Team Members

Don't take anything personally.

You are not your idea.

Take lots of notes!

You are responsible for turning these ideas into real value.

Everyone

Bring your unique perspective.

Ask questions and offer ideas, even if they're half-baked. This meeting is about trying to make sense of a complex situation that has no easy answers. You never know which tidbit of information will spark another person's thinking and help the group go deep.

Extend wide margins of grace.

Assume best intention and ask clarifying questions when you're unclear.

Share heaping helpings of gratitude. Say thank you, thank you, thank you!



Advisory Council Meeting Agenda

Purpose

To make the work better, broaden the team's options, and get them un-stuck.

Intended Outcomes

- Candid feedback
- New perspectives
- Documented takeaways including quick wins, possible solutions, insights, and research requirements

Duration: 90-minutes to 3+ hours

1 Greetings: Who's here today?

2 Goals: What the plan for this meeting?

- Confirm purpose, expectations, and rules of engagement
- Review list of challenges

3 Embrace the Challenge

- Team presents the challenge(s):
How might we (improve, save, design, solve, overcome)...
- Council offers perspective
- Team summarizes their takeaways

4 Closing Thoughts

- Council BLUF
- Confirm next meeting



STEP-BY-STEP INSTRUCTIONS

Before the meeting

Scheduling and Logistics

For councils considering a single, focused challenge, schedule 90 minutes. Otherwise, **try to schedule a full afternoon**. This gives the council time to get into the deep discussions you want.

Host a meal before or during the meeting to support the informal connections and energy levels people need to be at their best.

After your initial council meeting, we recommend **scheduling the next four council meetings in advance**. This reserves council member's time and establishes a predictable meeting cadence without locking you into a long-term schedule.

Preparing for the Discussion

Both the council members and the people presenting challenges need to come prepared.

As the meeting leader:

- **Meet with new council members privately** to brief them on the process, their role, and any logistics. Your goal is to make sure they'll show up knowing what to expect and ready to engage constructively.
- **Help team members frame their challenge**. Let them know how long they have to present, how to prepare content, and what to share in advance.



Schedule council meetings monthly or quarterly for best results.



During the meeting

1

Greetings: Who's here today?

Always start with [introductions](#). Ask each person to share their name and their role in the meeting, focusing specifically on the relevant expertise and unique perspective they're bringing.

If this is the first meeting of the council, take a look at the [Gifts and Hooks](#) technique for leading these introductions.

2

Goals: What's the plan for this meeting?

After the introductions, quickly review the meeting plan.

Everyone should have received the meeting purpose, duration, and rules of engagement in advance, so just take a moment to remind the group of these and check for questions. Let people know when they can expect breaks and check that everyone can stay for the entire meeting.

Then, share the list of challenges to address in the meeting, and how much time you'll have for each topic. Council discussions can be really engaging, which means people will keep talking until time runs out. It's important for everyone to know the time limits in advance.

Once you've confirmed that everyone understands and agrees to the plan, dive in!

3

Embrace the Challenge!

The bulk of this meeting consists of free-flowing discussion.

We recommend establishing a light process for introducing and closing the discussion for each topic to ensure you get a useful result.

See the next page for an example process and sample questions you can share with the council.



SIMPLE PROCESS FOR INVITING GREAT ADVICE

1. Presentation	<p>The team shares the challenge they're hoping to overcome, what they've tried so far, and any results.</p>
2. Questions	<p>The council ask questions about the challenge. They may ask clarifying questions to better understand the facts, or questions of curiosity. Here are a few example questions that help deepen a group's thinking.</p> <ul style="list-style-type: none">• If you had all the resources you needed, what would you do?• If you were brand new to this group and were looking at this with fresh eyes, what would you do?• What have you already decided that is limiting what you can do now?• What could happen that would ensure this failed? How might this go wrong?• What different ways of doing this have you already considered? Why did you choose against those options?
3. Discussion	<p>The council then shares their insights. They may offer resources in the form of research, introductions, or direct assistance, ideas about the relative merits of alternatives under consideration, and more.</p> <p>The council should make sure to highlight anything the team is doing really well, so this value doesn't accidentally get lost as they change their approach going forward.</p>
4. A moment	<p>The team takes a few quiet minutes to review their notes and prepare a summary of the discussion.</p>
5. Takeaways	<p>The team summarizes their takeaways by sharing (for example):</p> <ul style="list-style-type: none">• The value I'm taking away from this discussion is...• Quick wins: We can take action now by...• The options I'm now considering are...• I'm going to do more thinking and research about...• A key insight for me was...• The guidance I'm going to keep in mind is...



4

Closing Thoughts

Use the last 15 minutes of your meeting to go around the room and hear the council member's final thoughts.

For example, you might say:

Before we end for the day, let's go around the room and collect everyone's BLUF: Bottom Line Up Front, to help us remember the value we've created.

In one phrase or sentence, what is the key takeaway these teams should share with their colleagues who couldn't be here today?

After everyone shares their final thought, confirm the date for the next meeting and thank everyone for their contributions.

After the meeting

What happens next? That's up to the teams responsible for the work.

Great teams will act on the advice they've received, report their results back to their advisors, and express mountains of gratitude for the value received.



References and Resources



Articles and Examples

About Internal Council (aka Braintrust) Meetings

- [Inside the Pixar Braintrust](#), Fast Company
- Video: [Ed Catmull: Inside the Braintrust](#)
- [Trello's Product Braintrust](#)
- [The Council as a Mechanism to Understand the Inflection Points of Change](#), Jim Collins

About Councils of Outside Experts

- [The Strategic Advisory Board: Creation, Development and Extracting Advantage](#), Conscious Governance
- [What is an Advisory Board and Should We Have One?](#), Blue Avocado (non-profit focused)



Related Templates

These templates show other ways to get advice from peers and work through challenging problems.

- [How to Access the Wisdom of Your Group](#) by Paul Axtell
- [How to Run an Urgent Problem Solving Meeting](#) by Lucid
- [How to Run a Strategic Pivot Meeting](#) by Lucid and Angelique Rewers
- [How to Run a Proposal Feedback Meeting](#) by Dr. Richard Lent

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