Lucid Facilitator's Guide

PROGRESS, PLANS, AND PROBLEMS STATUS UPDATE

Useful for "reporting up", this status meeting format makes it easy to quickly share the key events driving a team's work. Each person or department shares 3 to 5 responses for each category.

- **Progress:** Any accomplishments since the last update
- **Plans:** What you're working on next
- **Problems:** Where you need help

Best For

Reporting up and out

10 or fewer people

Groups with **less shared context.**

Contents

WHEN TO MEET

Most teams use the Progress, Plans & Problems reporting format for written status reporting rather than meetings. Let's look at when to meet using this format, and when you may be better off sticking with email.

Depending on the people you work with and the work you manage, you may find that sending PPP updates by email works well on it's own. Most groups, though, benefit by meeting regularly to ask questions and build personal connections.

Consider using the Progress, Plans & Problems format in a meeting in the following situations.

Reasons to Schedule a Meeting

- No one comments on the email report, and you can't tell if anyone is reading them. Use a meeting to make sure everyone hears the same information at the same time, and open up discussion between people who don't reply in writing.
- You find your team scheduling meetings to talk about what they see in the reports. Prevent the proliferation of ad-hoc meetings by providing a single short meeting that addresses all the questions at once.
- You have a regular status meeting already scheduled, and can save time by using the written status report to drive the discussion.

Scheduling

Schedule this as a **weekly meeting for internal teams**, or as **a monthly update when reporting out** to investors or other outside stakeholders.

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 will make 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 PPPs.

During the meeting

1 Team Updates

Welcome everyone and explain the process if this is your first time using this template.

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.

2 Closing

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

Use the **"Copy meeting"** feature to create the next meeting. This will copy forward everyone's report for this meeting. When they add an update for the next meeting, this will make it easy to move the **Plans** for this week to the **Progress** for next.

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 stand-up.
Low energy	**Mix it up! See tips below.**

MIX IT UP!

Routine helps a team gel and create a consistent rhythm to their work, but it can also get boring! If your status meetings start to drag, try one of these variations.

1. Ask different questions.

Progress, Plans and Problems cover the key elements essential to all status updates, but answering these same questions every time can get dull. Consider asking one of these **additional questions** when you hear lackluster reports.

- What came up that you didn't expect?
- What did you learn that the group should know?
- How confident are you that we will hit our goals, on a scale of 1 to 10? (where 1 means "not at all" and 10 means "completely confident!)

2. Change the meeting frequency.

If your work really doesn't move that fast, consider meeting less frequently. Or, if your meeting goes too long, try meeting more often – you obviously have things to talk about!

3. Try a different template!

RESOURCES FOR ACHIEVING MEETING MASTERY

Websites

Cleve Gibbon, "Planning, Productivity and Progress – The Power of P"
http://www.clevegibbon.com/2013/01/planning-productivity-and-progress-the-power-of-p/

Emi Gal, "Progress, plans and problems"
http://emigal.com/post/38339681077/progress-plans-and-problems

Colin Nederkoorn, "Progress, Plans, and Problems"
http://iamnotaprogrammer.com/Monthly-Emails-To-Advisors.html

Progress, Plans & Problems (PPP) methodology

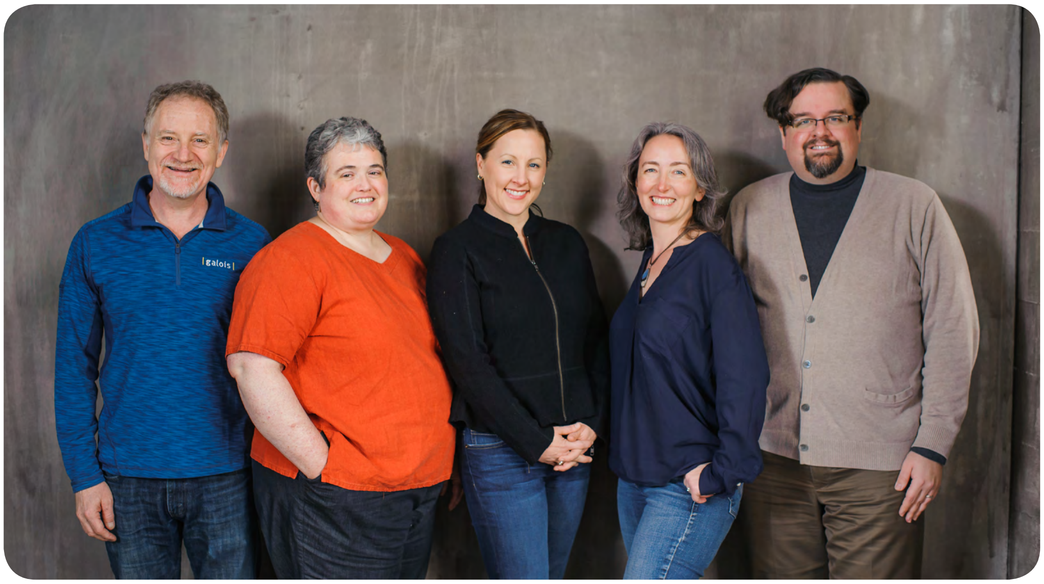
https://blog.weekdone.com/faqs/implementation-guide/progress-plans-problems/

Lucid Meetings How-To

Tips for Managing Status Meetings

ABOUT THE AUTHOR

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



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