Lucid Facilitator's Guide

STANDARD PMO STATUS UPDATE MEETING

This meeting works as part of a mature Project Management process. If you've worked as a manager in a larger company, you've probably participated in many meetings following this basic format.

This meeting often takes longer than necessary, making it the reason so many people hate meetings. **To be effective, you must keep it focused and fast.** You'll find several tips to help you succeed throughout this guide.

Best For

Teams following a **mature PMO process**

15 or fewer people

Organizers who are **comfortable facilitating** meetings.

Contents

STEP-BY-STEP INSTRUCTIONS

Before the meeting

Schedule this meeting **at least one week in advance**, ideally at the end of the previous meeting when you can have everyone check their calendars together.

You'll be reviewing several reports and dashboards in this meeting. **Update the agenda with the most recent information at least 4 hours before the meeting.**

If you track project information in Excel, we recommend that you **upload a copy of the Excel report** to the agenda so people can review it in advance. Then, if you make updates to the spreadsheet during the meeting, share your screen so everyone can see what you're doing.

If you use an online system to track your projects, **add a link to the project dashboard** to the agenda. This will open your project in a new tab for people to review. Again, you'll want to share your screen if you make updates to the project records during the meeting.

Use screen sharing to let everyone follow along when you update project records in other systems during the meeting.

During the meeting

As the meeting leader, it's your job to keep the meeting clipping along. You succeed when the conversation stays focused and the meeting ends early!

You'll also want good documentation of decisions and agreements made in the meeting. Since your main job is running the meeting, **ask one or two other people to help capture notes**. The meeting is setup so everyone can take notes, but usually you'll need to ask someone specifically to take note taking responsibility to make sure it happens.

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. If at all possible, **don't wait for latecomers**. This disrespects the time of everyone else and starts the meeting on a bad note.

When you're ready to start, set the tone. **Ask for everyone's full participation** so you can get through the agenda efficiently. For example, you might say:

> "Ok, let's get started.
>
> Thank you all for updating your information before the meeting. We have a lot to cover, and I know everyone is really busy, so I'm going to ask that you **please turn off your email and anything else that might be a distraction during the meeting**. I promise that if we can stay focused and get through the agenda, we'll end the meeting as soon as we're done – hopefully early!
>
> Everyone ready?"

When you're ready, **click "Next >"** to move to the next item and start the discussion.

2

Summary of Status

This is the meeting's main event. The rest of the agenda items are housekeeping, and should be kept very short.

Tip: Don't read reports in the meeting!

There's nothing more deadly than reading out loud to a group, especially on a conference call.

Instead, ask the group if they've had a chance to review the report. If they haven't, **give them 1 or 2 minutes** to do so. It shouldn't be a lot of text, and you can watch the timer to keep track. This will also encourage people to prepare in advance for the next meeting.

Now, take a moment to **celebrate any big achievements** in the report, congratulating and thanking those responsible. Effective teamwork thrives on acknowledgement and expressing gratitude for each other's efforts.

Then, **highlight big news** in the report, like a new problem or major schedule change, and **ask the responsible party to provide a quick update**.

For example:

> "As you all saw, (XYZ happened). (Person responsible), can you give us a very brief update on anything you've learned about this that isn't in the report and that the group should know?"

Finally, ask if anyone has any other questions about the report.

Click "Next >" to move to the next agenda item.

3

Open Action Items

For this item, you'll **call on each person with an open action item and ask for an update**. We've set up a Smart List that shows any open action items you've captured in Lucid Meetings, and you can also add a link

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or spreadsheet of action items you track elsewhere.

We recommend asking two questions about each action item:

1. Any change to the status we see here?
2. Anything the group needs to know?

Tip 1:
You want a verbal reply from the owner. This is **the strongest way for project teams to make and keep commitments to each other** - write them down, then verbally confirm them in front of everyone else. Move through the list quickly, allowing time for short questions and answers only.

Tip 2:
While it's more efficient to go through each person's items in turn (all of Fred's items, then all of Rashid's, for example), it's **often less effective.** Often, people stop paying attention until it's their turn. To avoid this, **go down the list in due-date order**, with overdue items first. That way, everyone will need to stay focused and ready to speak.

Tip 3:
Lots of action items? **Only discuss those action items that are overdue or due in the next few weeks**.

When you've finished the list, **click "Next >"** to start review issues and risks.

4 Open Issues and Risks

Ideally, you and your team created action items to address any known issues and risks in the past. Since you've just covered all the action item updates, you

4 continued

shouldn't spend much time talking about previously identified issues and risks.

Assume that everyone read the report, and **only discuss items with new information if necessary**. If the status and planning around an issue or risk is the same as it was at the last meeting, don't waste everyone's time going over it again!

Then ask:

> "Has anyone identified a new issue or risk that we need to start tracking in this meeting?"

Capture new issues and risks. Allow enough discussion for the group to understand the issue, but don't try to solve them in the meeting. Instead, **create an action item for each new issue or risk and assign an owner and due date** for coming up with a plan to address it.

When you're done documenting new issues and risks, **click "Next >"** to move to the closing item.

5 Closing

You have three goals with this agenda item.

1. Make sure everyone confirms the decisions and agreements you made in the meeting.
2. Make sure nothing important got missed.
3. Confirm the next meeting date.

We've added a Smart List to this agenda item that shows any notes captured during the meeting.

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continued

Ask the group to review the list.

> “Here are the notes we captured today. Please take a look. I’d like to ask each of you in turn:
>
> - Do you think we captured our agreements correctly?
> - Is there anything missing?
>
> If it looks good to you, **please reply with “Looks good” when I call your name.**
>
> I’m looking at the attendance list in the Attendees box, and will start at the top with **(name of first person on the list).**”

Call each person in turn. Lightning fast!

Next, **confirm the next meeting time**.

> “We’re scheduled to meet again on **(date and time)**. Does that still work for everyone?”

Finally, conclude the meeting by **thanking everyone and asking for feedback**.

> “Thank you all for staying focused and for your contributions.
>
> There are a lot of ways to run this kind of meeting, and I want to make sure this is a good use of everyone’s time. Before you leave, please quickly rate this meeting and provide some feedback on the form you’ll see once the meeting ends.

Now, use the meeting menu at the bottom left corner of the page to **click “End Meeting”**.

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
People seem distracted	• Set a ground rule of no multi-tasking. Conduct a group ritual unplug; turn off chat, email, and all notifications during the meeting. • Change the meeting time. You may be catching people at a time when they're too busy or too tired.
Poor updates, not many questions	• Contact people individually to learn how you can help them participate more.
Discussion wanders, takes too long	• Try using a "parking lot". • Try changing the meeting length or frequency. You may need to meet more to cover everything.

RESOURCES FOR ACHIEVING MEETING MASTERY

Websites

Project Management Docs, "Communications Management Plan"
Learn how the status meeting fits into the larger project management process.

http://www.projectmanagementdocs.com/project-planning-templates/communications-management-plan.html

Excel Dashboards, "Templates for Issue trackers, Project Management tools and dashboards, kpi dashboards"

Get snazzy Excel templates for tracking issues and risks.
http://exceldashboardschool.com/project-management/

Gary McClain, Ph.D., and Deborah S. Romaine, "Productive Meetings: Shaping Interactions"

Excellent tips on facilitating the discussion to encourage particpation.
http://www.netplaces.com/managing-people/productive-meetings/shaping-interactions.htm

Lucid Meetings How-To

Tips for Managing Status Meetings

ABOUT THE AUTHOR

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

Learn more about us on our website.