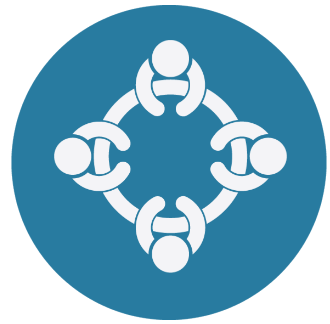
Team Check-In and Report-Out Meeting

Teams use this meeting during times of rapid change.



Purpose:
To ensure everyone has accurate information about what's going on in the team, identify barriers to execution that need to be solved, and prepare updates to share with the rest of the organization.

Expected Outcomes:
Everyone has current information
Answers to open questions
Action items created for those who will help solve problems
A communication plan with info to share with the organization

Process

1. Check-in
2. Read Team Reports
3. Celebrate Wins
4. Answer Questions
5. Discuss Priority Topics
6. Draft Communication Plan for Reporting Out
7. Closing Review and Appreciations

Frequency

Daily to Weekly

This meeting makes sure everyone has accurate information, which means you need to run it whenever the information you shared before becomes outdated. In rapidly changing situations, you may need to run this meeting every day. As the situation stabilizes, you can decrease the meeting frequency.

Duration

The first few times you run this meeting, expect it to take quite a bit of time. Your team is trying to figure out what's going on in a rapidly changing situation, work through a new process, and make quick decisions based on incomplete information. That's a lot to do, so expect the first few meetings to take 90 minutes or more.

To make this meeting shorter, run it more often. When you meet three or more times per week, you can build off of information you already have and learn how to quickly identify all the key points for discussion. With practice and as your understanding grows, this meeting can get down to 30 minutes for teams of 8 or fewer.

Step-by-Step Instructions

Before the Meeting

This meeting assumes you and your team are dealing with lots of rapidly changing information. To keep your meeting efficient and calm, ask everyone to provide a written report with their updates before the meeting. During the meeting, your team will read through these reports silently together, then discuss any questions or ideas that need discussion.

If getting written reports in advance won't work for your team, add more time in the meeting for people to talk through each update.

During the Meeting

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1. Check-In (5 min or less)

Welcome everyone to the meeting and run a quick check-in exercise. This will get everyone engaged right away and help them transition from whatever they were doing before into this meeting.

These recommended check-ins work well for teams under stress.

A. **Temperature Check**
In a temperature check, everyone says how they're doing on a scale of 1 (mostly dead) to 10 (super star!), and why.
Example: Today I'm a 7. Feeling busy, but in a good way.

B. **One Word Go-Around**
Ask everyone to state how they're doing right now in one word or simple phrase.

C. **Five Synchronized Box Breaths**
Box breathing is a technique which calms the nerves and reduces anxiety. It's used by mission critical teams and high-performance teams to refocus the group, establish calm, and get the group in synch. Read about it here: https://www.healthline.com/health/box-breathing

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2. Read Team Reports (10 min)

Everyone reads team updates in silence. As each person reads, they should make note of any:
- **Questions** they have about what they've read
- Updates that deserve **congratulations**
- **Topics for discussion**
- **Information to share** with the organization

Ask everyone to quietly signal when they've finished reading. When everyone's ready, you can move on.

What should the reports include?
That depends on your team and the work you do. Your team check-ins might include:
- Done: Work completed since the last meeting
- Doing: Current work priorities
- Blocks: Anything making it hard to get work done

- Requests: help needed
- Learned: new insights or discoveries
- Availability: any schedule changes or time away

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3. Celebrate Wins (3 min)

Congratulate team members for achievements that deserve celebration, and express appreciation for jobs well done.

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4. Answer Questions (5 - 10 min)

Anyone who had a question about one of the reports they read will ask it now. The person who wrote the report should answer, and the group may briefly discuss these questions.

Important:
Ask questions to improve your understanding and check your assumptions only. Fact-checking questions often begin with *what, how, how many, which*, or *when*.
These questions improve the accuracy of the group's understanding and support your ability to have a productive discussion.

Do not use questions as a way to criticize your team member or make passive-aggressive suggestions
These questions often start with *why, why not, did you, why didn't you*, or *have you*. These questions make your team members feel attacked, which will cause them to become defensive and unable to contribute effectively to the discussion.

Examples:

- Clarifying question:
  In your report, you say the customer was fine. I'm not sure if fine means happy or just ok. Can you share more about what that customer said or did? (Ok!)
- Criticizing question:
  In your report, you say the customer was fine. Why didn't you ask them for more detail so you could learn how they really feel? (Bad. Don't do that!)

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5. Discuss Priority Topics

Next talk through anything the group identified as a high-priority topic. These topics should include anything the group can quickly talk through during the meeting in order to better understand the current situation, make a decision, or assign a task that someone will work on after the meeting.

What should you do if there are too many topics to discuss in the time you have?

1. Determine your time limit.
2. Prioritize the list of topics from most urgent/important to least urgent/important.
3. Discuss the top priority topic first. When you've completed it by documenting a decision, action item, or insight, move to the next item.
4. Work through these items in order until you have 5 minutes left in your time limit. As a group, decide what to do with the rest of the topics. Options include:
   - Add more time to your meeting.
   - Save them in a Parking Lot for discussion in the next meeting.

- Assign one or more team members to address the topics outside the meeting.

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6. Draft Communication Plan for Reporting Out (5-15 min)

Your team should be taking notes throughout the meeting and identifying information to share with the rest of the organization. Now, you will review the information you want to share and decide how to share it.

In times of rapid change and crisis, it can be extremely useful for every team to share:

What we need:

- Answers: What questions do we have?
- Resources: What resources do we need?

What we can share:

- Insights, Observations, Key Learnings: What have we seen or learned that may help?
- Offers: What can we do that could help?
- Recommendations: What would we do if we were in charge?
- From all of this, what's most important for others to know right now?

Leadership teams should also decide how they want to communicate each piece of information. Some should be shared in an All-Hands update meeting. Other information could be shared by email, posted to a web page, or shared via other communication channels.

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7. Closing Review and Appreciations (5-10 min)

Review your results. Make sure:

- The communication plan for reporting out is complete and accurate
- Every decision is fully documented
- Action items have clear descriptions, individual owners, and due dates when the group will check progress

Then share appreciations. Appreciations recognize team members for the specific value they bring to the group, and reinforce the kind of value you all want to see more of going forward. This ends the meeting on a positive note and sets shared expectations for the work that follows.

Begin by inviting the group to offer appreciations. Each person can thank someone that they feel contributed value in the meeting or through their recent work. Appreciations should be specific and voluntary; no one has to offer an appreciation and not everyone needs to be appreciated. Once all appreciations have been shared, end the meeting.

Useful References

The Lucid Guide to Team Cadence Meetings
https://www.lucidmeetings.com/meeting-types/team-cadence-meetings

Learn more about this kind of meeting and see alternative meeting templates.