LUCID

The Meeting Innovation Company

Guidebook and Templates: Meetings to Run When Changing Your Organization's Way of Working

(1) Set policy boundaries & timelines

(2) Train & (3) support team leaders

(4) Create team working agreements

(5) Review & revise agreements

(6) Harvest emerging best practice. Recommend changes.

Changing Your Organization's Way of Working

A Meeting Flow Model (MFM) describes a sequence of meetings used to achieve a buisness goal. This Meeting Flow Model helps organizations chart a path to a new way of working. Designed as a 12-week sequence, this approach gives teams maximum autonomy over their work, creates robust feedback loops across all levels of the organization, and establishes a predictable pace for change.

Use this MFM and the related meeting templates to support leaders responsible for implementing the change, to involve more people in the process, and to provide some predictability.

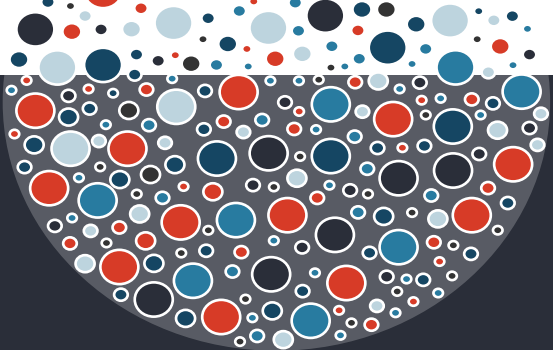## Contents

How to Use this Packet

This packet contains:

- This overview document, explaining what this meeting flow is designed to achieve and introducing the meetings involved
- Meeting templates for five of the six meetings in this flow, providing guidance and options for leading each of these meetings
- A spreadsheet for estimating the amount of meeting time involved

All together, this content provides a great foundation for designing your organization's iterative change process.

It can also be overwhelming. There's a lot here.

To make this manageable, here's what we recommend.

1. **Review this overview document and browse through the meeting templates.**
   There's no need to understand all the details up front, because you'll make changes later. Instead, get a feel for the process outlined here so you can determine which parts resonate with how your organization manages change.

2. **Decide which meetings your organization should run and who will run them.**
   (Need help with this? Let us know.)

3. **Share this packet with the people who will lead each of the meetings.**
   The templates provided are general templates that any organization might use. Ask the people who will lead these meetings to tailor these templates to your organization.
   Some of these meetings, like the action review and planning meetings, are meant to be run by all teams at once, so you should plan to train leaders on these templates during the training meeting.

4. **Schedule and run the meetings through one cycle.**

5. **Run a short action review on this meeting flow with your meeting leaders.**
   This flow is designed to help you introduce and iterate a change to your way of working. You can and should apply the same strategy to the change process itself. That way, you'll be all set to roll out future changes using a series of tried-and-tested meetings that you know work.

The world of work is constantly evolving. In the past decade, ways of working that had previously been considered exceptional entered the mainstream. The gig economy, remote and distributed teams, freedom-based business models, the four-day work week, agile projects, title-free workplaces, published salaries... dozens of "crazy ideas" began to spread across the globe.

Then, the global pandemic of 2020 accelerated the rate of change by sending millions to work from home. Much to their surprise, most teams found that they could indeed maintain productivity without commuting to a central office. With a government mandate eliminating the excuses and delays, organizations discovered that they can rapidly change how they work.

So - we know it can be done. We can change, and we can change fast.
Now, we get to choose how to change in a way that best supports our unique circumstances.

Supporting the 2021 Return to Work and Beyond

While the events of 2020 proved that we can change, they also showed how harrowing those changes can be. The summer of 2021 began with millions of people walking away from jobs that had become too stressful, too overwhelming, and too harmful to their personal wellbeing.

The Problem:
We can change, but when we fail to change well, we harm our teams and our businesses.

What's more, there is no good way to predict how the changes we introduce will impact our teams. Will they embrace the new ways of working enthusiastically? Do team members trust one another enough to talk about the mistakes they make along the way? You cannot know how all this will play out in advance.

You need a way to make changes, learn from them, and adapt.

This Meeting Flow Model (MFM) was designed to support organizations facing yet another wave of big workplace changes. This time, however, leaders can't blame any ill effects on a government mandate.

While you can move fast, you don't have to make changes as quickly as we did during the shutdown. Also, now that the mandates are lifting, you are free to change your mind based on what seems to work best for your organization.

Leaders can now design an incremental sequence of changes, allowing teams time to identify what works well and minimize the negative impact changes may have on morale, productivity, and collective wellbeing.

Business Goals for this Meeting Flow Model

This MFM works to support an iterative approach to organizational change process by:

Establishing a predictable schedule and method for making decisions about your way of working.

This model includes six meetings, held over 12 weeks. When you schedule these meetings, everyone involved can see when decisions will be made, when they'll gather information about how those decisions are working out, and when they'll have an opportunity to revisit and revise those decisions to improve your results.

This 12-week cycle is designed to be repeated several times.

Involving people at all levels of the organization.

This model outlines meetings for those working at all levels of the organization, ensuring consistency and knowledge transfer throughout.

Distributing responsibility and decision-making authority.

Teams that can shape and control how they work are more engaged, more productive, and happier at work. This model gives teams both autonomy and responsibility for figuring out the best way to implement the desired changes.

Providing learning feedback loops.

Teams regularly collect information about how changes are impacting their daily operations, which are shared with leaders in meetings where they can use that feedback to drive improvements to policy and practice organization-wide.

Documenting and distributing results.

Meeting records collected throughout the process can be shared to prevent rumors, misinformation, and bad assumptions from undermining the change process.

Beliefs and Assumptions

An iterative change process will help ensure that your way of working supports the needs of all stakeholders. With that goal in mind, this MFM assumes the following:

Assumption: Everyone wants to succeed.

Everyone involved wants to be successful at work, but we don't all measure success the same way. This MFM helps each functional group achieve the success they need.

- Senior decision makers set the policies required to ensure safety and business continuity, and gain evidence to support the decisions they must make going forward.
- People leaders get the training and support they need to implement these policies with their teams.
- Teams determine how they'll work together within the boundaries established by the senior decision makers, then regularly review their practice to make it better.
- An Advisory Council consisting of people from all levels of the organization makes sense of what they hear from teams across the organization and makes recommendations for the next phase.

Belief: Change creates both risks and rewards.

When an organization seeks to change their way of working, they're hoping to make work better. They may intend to:

- Improve diversity and equity
- Support employee well-being
- Increase agility, resilience, and adaptability
- Foster an innovation mindset
- Heal a toxic culture

- Increase productivity
- Merge distinct cultures coming from disparate teams, locations, or companies
- Improve workplace safety
- Improve quality

They're also taking a risk. They may worry about:

- Costs: can they afford to implement the change?
- Attrition: will key employees leave?
- Brand: will their inevitable missteps lead to bad press?
- Regulations: will they run afoul of labor laws, tax codes, or union contracts?

- Productivity: can they keep business running while also taking time to change how they work?
- Failure: will the initiative lead to the desired change, or will it just create a lot of noise and bother for nothing?

In these meetings, organizations acknowledge the risks associated with change and provide opportunities for everyone to learn, adapt, and improve as they pursue their intended rewards.

Belief: Planning is critical. Plans are advisory.

It's not possible to know in advance exactly how the intended changes will work out. This meeting cycle builds in several learning and feedback loops so leaders can regularly adjust course based on what they learn.

The Players

These meetings involve people filling different roles. It's important to identify which people or teams will fill each of these roles as you schedule these meetings.
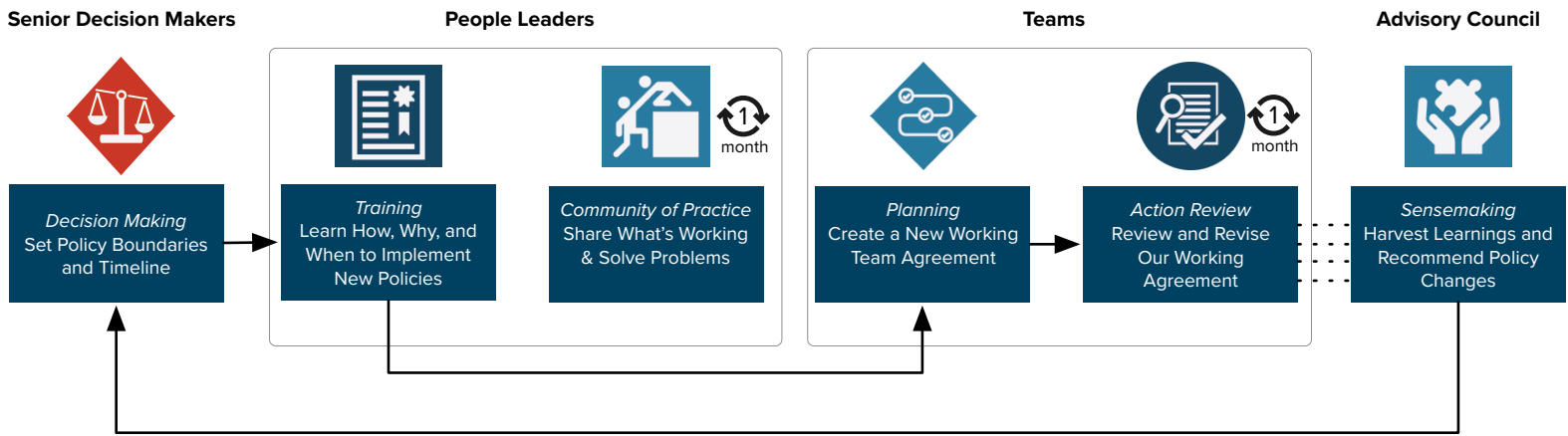
Roles

- **Facilitator/Trainer**
  Responsible for the meeting process and supporting content. The facilitator/trainer reviews the templates included with this MFM and adapts them to fit the needs of the current change initiative. They ensure each meeting runs effectively and achieves the desired results.

- **Senior Decision Makers**
  Responsible for deciding on the goals and success metrics for the changes, any required workplace rules, and the overall timeline. Senior decision makers are ultimately responsible for the success of the change initiative, so they also ensure teams get the resources and support they need to be successful.

- **People Leaders**
  Responsible for ensuring working teams implement the desired changes. People leaders (typically managers or department leads) work directly with individual employees and delivery teams to sort out all the details. They carry the requirements from the senior decision makers to the team and the insights from the team back to the decision makers.

- **Teams**
  Responsible for making a good-faith effort to implement the changes. Teams take responsibility for ensuring they work in ways that advance the desired changes and also support their ability to perform their duties at a high level. Teams commit to adopt, follow, and frequently adjust a documented set of working practices.

- **Advisory Council**
  Responsible for making sense of what happens when teams try new things and providing advice to the senior decision makers. The advisory council may include diverse representatives from across the organization, outside experts, and anyone who can provide useful advice about what needs to change next.

The Meetings

Meeting Flow Model for Iteratively Changing Your Way of Working
Meetings in one cycle. Cycle repeats every 3 to 6 months.

Senior Decision Makers	People Leaders		Teams		Advisory Council
Decision Making Set Policy Boundaries and Timeline	*Training* Learn How, Why, and When to Implement New Policies	*Community of Practice* Share What's Working & Solve Problems (1 month)	*Planning* Create a New Working Team Agreement	*Action Review* Review and Revise Our Working Agreement (1 month)	*Sensemaking* Harvest Learnings and Recommend Policy Changes

Decision Making
Set Policy Boundaries & Timeline

Senior decision makers decide which new policies will govern the way work gets done in the organization. They aim to ensure safety and business continuity. They also set a timeline for revisiting these policies once they've gathered evidence on the impact these changes have on the business.

Training
Learn How, Why, & When to Implement New Policies

People leaders learn both the content and the underlying purpose of each new policy. They also receive supporting tips and tools for implementing these policies with their teams.

Community of Practice
Share What's Working & Solve Problems

People leaders meet with peers from across the organization in groups of 3 to 5, where they share what their teams are doing to implement the desired changes. Leaders bring their challenges to the group and support their peers by working to identify possible solutions together.

Planning
Create a New Working Team Agreement

Teams agree on how they'll work together within the boundaries set by senior decision makers. Teams outline when and where they'll work, how they'll communicate, and other details about how they'll ensure their work goes smoothly.

Action Review
Review & Revise Our Working Agreement

Teams run short action reviews to update their working agreement based on what they learn, quickly mastering the skills and practices required by this new way of working.

Sensemaking
Harvest Learnings & Recommend Policy Changes

Team leaders bring learnings from their teams' Action Reviews and Community of Practice sessions to an advisory council. The council discusses these learnings and recommends policy changes for consideration by the senior decision makers. These evidence-based recommendations are used to make the decisions that drive the next change cycle.

Estimated Meeting Time Investment

These estimates help everyone ensure you have the resources and budget needed for this work.

This MFM lists all the meetings in a single iteration. Most change initiatives will take multiple iterations to complete.

These numbers assume that senior decision makers will update policies once every 12 weeks and that teams work a standard 40-hour work week. To get more accurate estimates for a program with a different cycle duration or a shorter standard work week, use the Meeting Time Investment spreadsheet included in this packet.

The table below shows the minimum estimated time spent preparing for and attending these meetings for each player over the course of one 12-week cycle. Participants should expect to spend more time than this in the first cycle, as they learn how to run these meetings effectively. Subsequent cycles will match and then beat these estimates, as each meeting becomes much more efficient with practice.

Player	Estimated Meeting Hours	% of Available working hours
Facilitator/Trainers*	31 hours 30 minutes	6.6%
Senior Decision Makers	6 hours	4.7%
People Leaders	15 hours 45 minutes	1.2%
Teams	3 hours 30 minutes	1.5%
Advisory Council	4 hours 30 minutes	2.3%

*The facilitator/trainer estimates will vary widely based on which meetings each person facilitates and how many teams they support. Large companies will gain the most efficiency by assigning a few full time resources to support teams during the first two cycles.

Reasons You Might Want to Adjust this Timeline

This 12-week cycle gives teams three months to work within a set of policy boundaries before you make more changes. For many teams, this will be enough time for people to distinguish issues that arise simply because they're doing something new from fundamental flaws in the system.

If your teams need more time to try out new practices and provide feedback, make your cycle length longer.
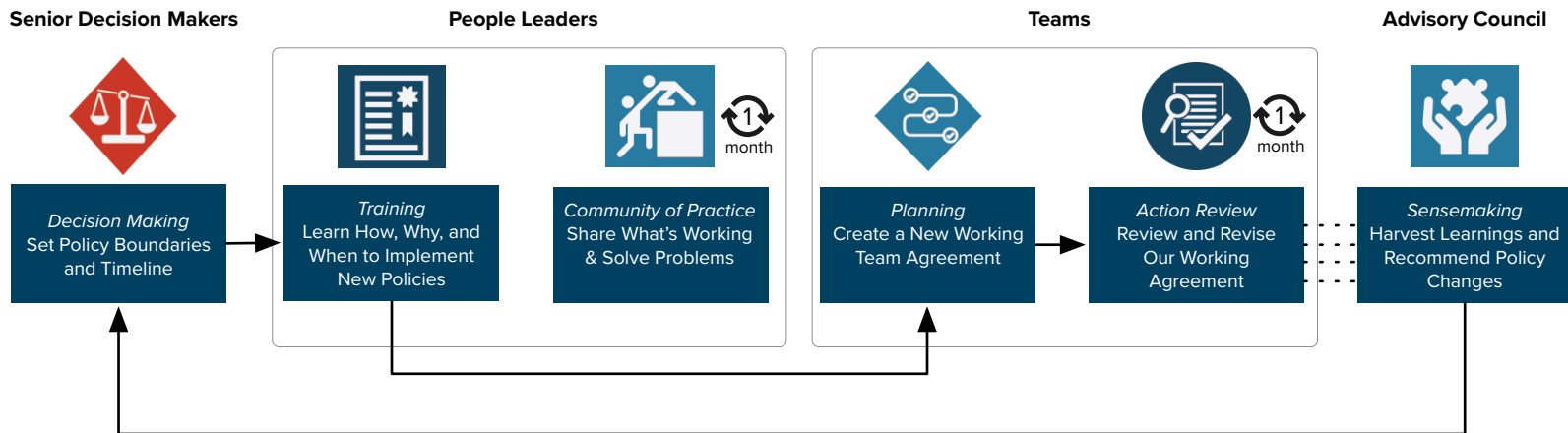
That said, if there are big problems with your initial approach, those problems won't get better with age. If you have significant concerns up front, consider working with fewer teams in one-month cycles. This will accellerate your rate of learning and improvement.

This model doesn't dictate how much time should elapse between the initial decisions made in the first meeting and the rollout of those decisions in meetings two, three, and four. We recommend trying to run these meetings within the first week and a half. This gets ahead of the rumour mill by everyone involved in the change quickly. It also reinforces your willingness as a team to go forward with something that may be imperfect, learn from that, and improve.

Meeting Details

Meeting Flow Model for Iteratively Changing Your Way of Working
Meetings in one cycle. Cycle repeats every 3 to 6 months.

| Senior Decision Makers | People Leaders | | Teams | | Advisory Council |

Senior Decision Makers
Decision Making
Set Policy Boundaries and Timeline

People Leaders
Training
Learn How, Why, and When to Implement New Policies

Community of Practice
Share What's Working & Solve Problems

1 month

Teams
Planning
Create a New Working Team Agreement

Action Review
Review and Revise Our Working Agreement

1 month

Advisory Council
Sensemaking
Harvest Learnings and Recommend Policy Changes

Meeting	Attendees	Time
Decision Making: **Set Policy Boundaries and Timeline** **Purpose:** To decide on the changes teams need to make to their ways of working and a timeline for reviewing this decision **Intended Outcomes:** • A documented decision about the new workplace rules • Clarity about the purpose behind each rule explaining why leaders believe it matters • A timeline for implementing the new rules and a date for reviewing the results of this decision and potentially updating it • Assigned resources for communicating the decision and training people leaders **Recommended Template:** How to Lead an Effective Decision Making Meeting **Tips** Seek to give teams and employees as much autonomy over how, when, and where they conduct their work as possible. Rather than rigid rules, consider establishing policy boundaries that define a minimum or maximum acceptable practice, and mechanisms for teams to define their own specifics within those boundaries. Current employment trends show that employees will accept positions that offer less pay, career advancement potential, or prestige in favor of jobs that offer flexibility and autonomy.	Senior Decision Makers, Facilitator	2+ hours

Meeting	Attendees	Time
## Training: Learn How, Why, and When to Implement New Policies **Purpose**: To ensure people leaders have the information and resources they need to implement the desired change. **Intended Outcomes:** • Clarity about what's expected, what success looks like, and why it matters • Answers to questions • Shared awareness and commitment to the timeline There's no template for this one, because the content depends entirely on the change you're making. **Tips** Try to keep your training to 90-minutes or less, to stay within the limits of most people's attention span. The first time you lead this training, include a senior decision maker who can answer questions about the big picture goals and rationale behind this change. For subsequent change cycles, you may be able to replace this training with a quick prerecorded video explaining any incremental decisions.	Trainer, People Leaders	1 hour 30 min, once per cycle
## Community of Practice: Share What's Working and Solve Problems **Purpose:** To share strategies, solve challenges, and hold one another accountable for making the desired changes. **Intended Outcomes:** • Shared understanding of current status across the organization • New ideas about how to approach current challenges • Additional resources to bring to their teams • Better understanding of how they can support each others' efforts • Clarity about what everyone is expected to do before the next meeting **Recommended Template:** How to Host a Peer Mentor Meeting **Tips** This meeting supports leaders working in organizations where they don't have other regular opportunities to collaborate. These meetings make a big difference in the first 3 to 5 months of a major change. After that, peer groups may choose to continue meeting on their own. This makes for a great lunch meeting.	Facilitator/ Coach, People Leaders	1 hour, repeats monthly

Meeting	Attendees	Time
## Planning: Create a New Working Team Agreement **Purpose**: To decide on a near-term plan outlining how we'll coordinate and collaborate on our work. **Intended Outcomes:** • A documented set of agreements clarifying where, when, and how we'll work together • Clear air: everyone has an opportunity to share preferences and clarify assumptions • A scheduled day and time for revisiting this agreement **Recommended Template:** How to Create a Working Team Agreement **Tips** Plan a full two hours for this meeting the first time you run it. After that, most changes can be made using the Quick Retro that follows. Teams should run the entire meeting again only when there is a major change in their operating context or the policy boundaries set by the organization.	People Leaders with their Teams	2 hours first cycle, then as needed
## Action Review: ## Review and Revise Our Working Agreement **Purpose:** To review a working agreement and improve it. **Intended Outcomes:** • Reminders about what's in the agreement • Insight into what's working and what should be improved • A list of specific changes to make **Recommended Template:** How to Run a Quick Retro on Your Working Team Agreement **Tips** People leaders should document the team's insights into what works well and their ideas for improvement in a way that preserves confidentiality of who said what during this meeting. This feedback may prove invaluable to peers in the next peer group meeting, and will create the evidence sought by the advisory council as they form their recommendations.	People Leaders with their Teams	15 to 30 min, repeats at least once per month

Meeting	Attendees	Time
### Sensemaking: ### Harvest Learnings and Recommend Policy Changes **Purpose:** To prepare evidence-based recommendations that senior leaders can use to improve organizational policies. **Intended Outcomes:** • Candid feedback about what is and is not working • New perspectives and insights • Documented recommendations **Recommended Template:** Braintrusts: How to Lead an Advisory Council Meeting **Tips** An advisory council composed of people working from different parts of the organization and at different levels of seniority can be a great way to ensure cross-pollination of learning. This also brings diverse perspectives into the decision-making and change process, increasing the overall feeling of inclusivity and fairness in the process. That said, if senior decision makers ignore the council's recommendations, the council will be seen as tokenism and the overall process will lose credibility. This means that senior decision makers must seriously consider all recommendations provided by the council. When they decide to do something that contradicts these recommendations, extra care must be made to communicate the alternatives considered, key points from the discussion senior decision makers had concerning the council's recommendations, and a clear rationale about why they decided as they did.	Advisory Council	3+ hours, once per cycle

References and Resources

- [A Process for Navigating Your Company's Return to Work](#)
  This article discusses use of this MFM for navigating a return to work following the 2020 global pandemic.

- [Meeting in Times of Rapid Change and Crisis](#)
  This meeting flow works to rapidly assess and respond to a crisis as a team. It was written in response to the onset of the 2020 pandemic, but can apply to any emergent business crisis.

- [Why Meeting Flow Models are the Key to Unlocking Your Team's Meeting Success](#)
  This series of articles explains what meeting flow models are, why they're so useful, and how to create a new meeting flow model of your own.

- [All the Resources](#)
  Find 50+ additional meeting templates, a glossary of meeting techniques and terms, links to training, and more on our resources page.

At Lucid Meetings, we help teams run successful meetings every day. If you have questions about these resources, need expert assistance with your meetings, or would like to innovate with us, [get in touch](#).

We'd love to work with you.