Meeting Flow Model for a
Lucid Enterprise Pilot Program

This Meeting Flow Model helps Lucid Meetings and our Enterprise Software Pilot clients plan for a successful program.

Use this MFM and the related meeting templates to set expectations with everyone involved in the program and as a starting place for building the program's final schedule.

Contents

Intro to Pilot Programs

When you work to support enterprise technology adoption, you have to get attention and buy-in from lots of already-too-busy people in order to succeed. While everyone involved may be thrilled by the possibilities, the reality is you have to do the work to get the results.

Pilot Programs lead everyone from the high-expectations set during the sale, through the required learning and configuration grunt work, onto the path of sustainable adoption. This Meeting Flow Model (MFM) addresses common challenge encountered throughout software pilot programs.

Speeding the Hype-to-Happy Journey

Pilots start with big promises and high hopes. Most enterprise software also comes with lots of configuration and customization options, which means we have to work thorugh how to best implement the software in each client's environment.
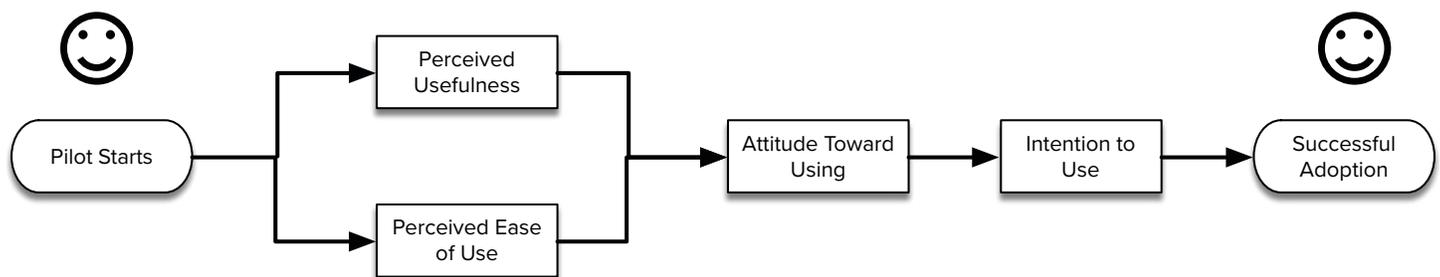
The Technology Adoption Model, adapted to Pilot programs.

Every time someone on the pilot team encounters something they don't expect or understand, they feel a gap between what they were promised (the hype) and what they're experiencing. They perceive the software as less useful and harder to use.

Because there are so many moving pieces involved, people will inevitably find those gaps. If the gaps aren't addressed quickly, the client will fail to adopt the software.

This MFM works to prevent that by:

- Establishing clear expectations and a common understanding during the first week.
- Holding frequent meetings during the pilot so everyone can surface new issues and questions quickly, before they have time to fester.
- Running an action review and re-plan mid-way through the project, ensuring the rest of the pilot focuses on resolving key adoption challenges.
- Documenting results in meeting records, giving business leaders the insights they need to make sound contracting decisions.

Beliefs and Assumptions

A good sales process will ensure that our software is a good match for the client's needs, and that both parties are capable of supporting a mutually beneficial business relationship.

With that groundwork in place, this meeting flow model assumes the following:

Assumption: We all want 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.

- Business leaders get evidence to support the decisions they must make about this investment of time, effort, money, and good-will.
- Project leaders get regular progress updates and the support they need to keep all the pieces moving.
- Pilot teams get training, support, and influence in how (or if) the software gets adopted more broadly.
- Technical teams collaborate to make sure the software is safely and successfully integrated into the existing business infrastructure.

Belief: Everyone is taking a risk.

When a client agrees to a pilot program, they're taking a risk. They may worry about:

- poor adoption
- complaints from staff
- hidden costs
- getting locked-in to a bad contract
- committing to a product that won't be maintained

- data security
- the impact to jobs ("automating away")
- liability
- implementation costs
- never-ending launch projects
- and more.

Software providers are taking a risk too. A pilot represents a significant investment into a relationship that may or may not continue. Software providers also worry about:

- poor adoption
- nightmare clients
- market reputation
- feature demands

- slippery-slope contracts
- the impact on staff
- decision-making delays
- and more.

We've all been there.

Belief: Planning is critical. Plans are advisory.

The original pilot plan gets created during the sales process, before either party really understands what they're getting into. It should be considered advisory and updated weekly at a minimum.

The same is true for this MFM. You may need to meet more or less than shown here. You may choose to combine some meetings, skip a few, and add others. Always adapt your meetings to fit the time and context in which they're held.

Lucid Enterprise Pilot Meeting Flow Model

Goal
To develop a mutually beneficial long-term business relationship.

Program Intent
1. Teams run more successful meetings every day.

2. We establish a mutually beneficial and respectful working relationship.

3. The program profitably delivers a high ROI.

What Success Looks Like
The client adopts the software because it solves their core problem. Everyone is so thrilled with the result that we co-author an awesome case study we're all proud to share.

Guidance/Values
1. **Make it easy.**
   It's our mission and the definition of facilitation - make the process as easy as possible while staying in service to the goal.

2. **Make it measurable**.
   Know what it means for this team to run successful meetings and measure that success.

3. **Partner**.
   The pilot teams are the experts on their work. We're the experts on meeting performance. Together, we partner to co-develop the best solution for their unique needs. We do this by asking great questions, setting expectations at each step of the process, gathering data, sharing stories, and regularly meeting to build trust, show our work, and adjust our actions based on what we learn.

4. **Build the case study together as you go.**
   Document key events, stories, and quotes throughout the program. This makes it easier to bring new people into the program as you go along and will give you everything you need to create the reports at the end.

Anticipated Challenges
1. **The pilot team may misunderstand the solution.**
   They may assume that Lucid is similar to conferencing software or other communication technologies, and arrive unprepared to engage in this program's work.

2. **The program champion may see this as a technology-only program.**
   This can lead them to underestimate the amount of process, policy, operational, and other culture change implications the program will create.

3. **Lack of trust.**
   At the beginning of the program, pilot teams will see us a vendor, not a partner. Many employees in large organizations distrust all vendors. They won't believe anything we tell them until we prove it.

The Meetings

There are 16 distinct type of business meetings. While you may need to add other meetings, the core MFM relies on these eight meetings.

Kickoff Workshops

Kickoffs create shared expectations for the program. Everyone involved discusses their goals and concerns for the program, confirms working agreements, and defines project logistics. Each interactive, facilitated workshop can take anywhere from 60 minutes to 3 hours.

Training

Training sessions help people learn exactly how to get work done. Training may cover technical topics, like how to use or support the software, business process, or meetings skills.

Progress Checks

Progress Checks keep the project on track and build trust. Held at least once per week, progress checks give the team an opportunity to be accountable for deliverables, adjust plans and address issues quickly. They also ensure all parties work with up-to-date information.

Working Sessions

Often teams find that they need to work through detailed documents or configuration options. Instead of tackling these in the Progress Check, which makes that meeting too long and increases the risks of missing other important updates, a small group works through these detailed items in a focused Working Session.

Sensemaking

We use Discovery sessions, Interviews, and Debriefing sessions to ask questions and pull out insights we can use when making plans. For example, the technical teams may hold a discovery session to explore integration options. Both teams should hold independent Sensemaking sessions before coming together to make decisions and craft new plans.

Planning

A great planning meeting begins with a plan that's already partly drafted. This prevents the "blank slate" problem, so teams can spend the meeting time confirming dates, adding missing tasks, and resolving open questions.

Action Reviews

Action reviews drive learning. Clients use pilot programs to learn how to best make use of software in their environment. Action Reviews are critical for ensuring that learning surfaces and gets documented.

Decision Making

At the end of the pilot, both parties must decide whether to continue with the relationship. If either party lacks a formal decision-making approach for this situation, they will need to schedule a Decision Making meeting prior to the pilot's conclusion.

The diagram on the next page shows the suggested timing and order for all the pilot program meetings.

Meetings in the Sales Process: First Inquiry to Pilot Approval

Purpose
To establish a mutually beneficial business relationship and secure the resources needed to run a successful pilot.
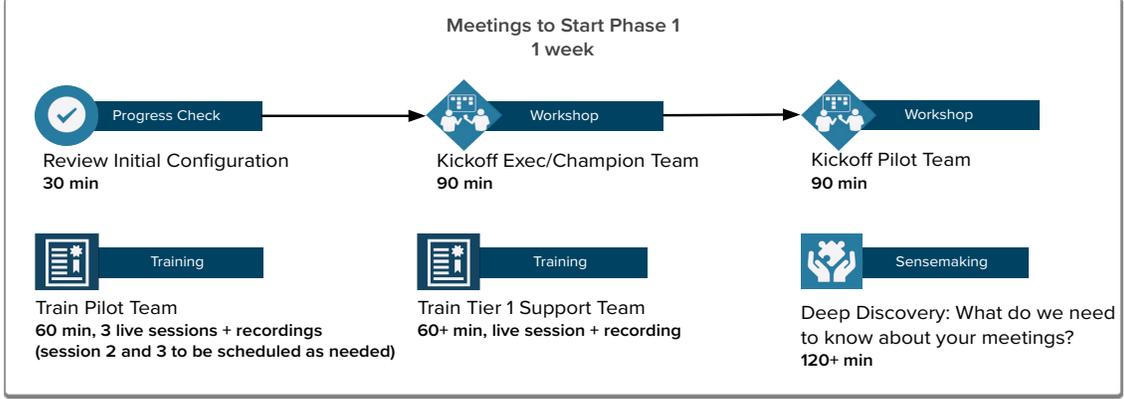
Outcomes
1) Documented business agreement and terms in place
2) Plan for the pilot, including primary goals, key milestones, team assignment, etc.
3) Pilot software provisioned and startup configuration complete
4) Initial invoice sent

Introduction
First Call: Intro to Lucid
30-60 min

Sensemaking
Capabilities Briefing:
Can we meet your needs?
90 min

Planning
Co-create Pilot Plan
90 min

Decision Making
Approve Pilot Start
30 min

Progress Check
Check pilot sales progress
30 min, as needed

Begin Here

Meetings in a Four Month Enterprise Pilot Program

Purpose
To ensure everyone involved in the pilot has a shared understanding of what success looks like and how we'll achieve it together.

Outcomes
1) Defined success milestones with acceptance criteria
2) Teams created and committed
3) Working agreements, including expectations, communication plan, support and issue handling
4) Initial training complete and first week's meetings scheduled
5) Context-specific challenges, opportunities, and requirements documented
6) A draft case study vision co-authored by both parties

Meetings to Start Phase 1
1 week

Progress Check
Review Initial Configuration
30 min

Workshop
Kickoff Exec/Champion Team
90 min

Workshop
Kickoff Pilot Team
90 min

Training
Train Pilot Team
60 min, 3 live sessions + recordings
(session 2 and 3 to be scheduled as needed)

Training
Train Tier 1 Support Team
60+ min, live session + recording

Sensemaking
Deep Discovery: What do we need to know about your meetings?
120+ min

Purpose
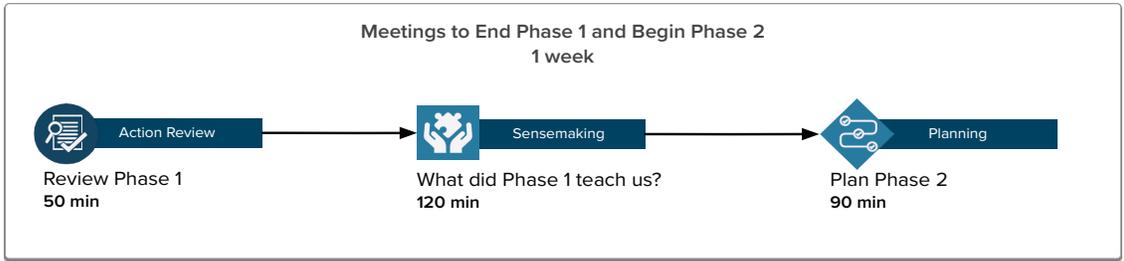To maintain program momentum, clear barriers, and address discoveries.

Outcomes
1) Updated progress reporting
2) Answers to questions that arise
3) Strategies and/or solutions for addressing problems
4) Documented insights to guide Phase 2

Meetings to Support Pilot Progress
4 to 6 weeks

Progress Check
Check Pilot Progress
10 - 30 min, 1x per week

Training
Answer Pilot Team Questions
up to 60 min, 1x per week

Team Cadence
Working Session
as needed

Purpose
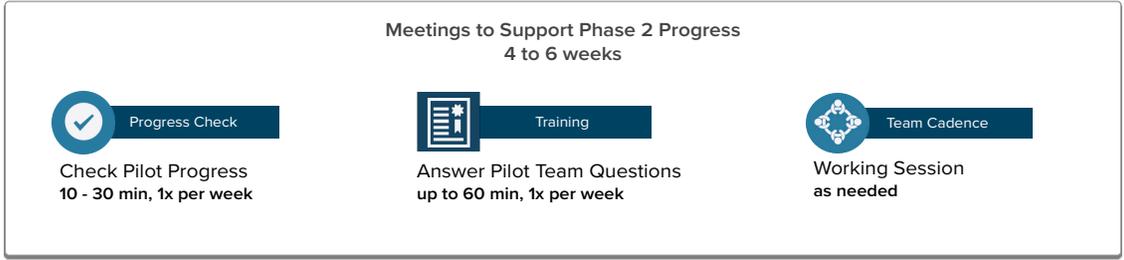To cement learning and create an informed Phase 2 plan.

Outcomes
1) Documented Phase 1 results
2) Updated Phase 2 plan, including adjustments to success milestones, team composition, and working agreements.
3) Updated draft case study, including quotes and insights from phase 1.

Meetings to End Phase 1 and Begin Phase 2
1 week

Action Review
Review Phase 1
50 min

Sensemaking
What did Phase 1 teach us?
120 min

Planning
Plan Phase 2
90 min

Purpose
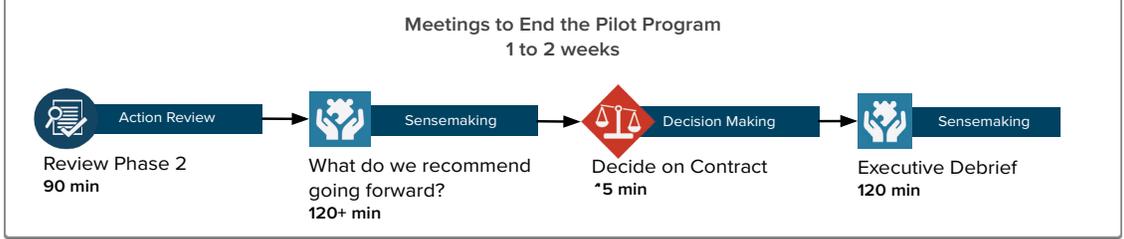To maintain program momentum, clear barriers, and address discoveries.

Outcomes
1) Updated progress reporting
2) Answers to questions that arise
3) Strategies and/or solutions for addressing problems
4) Documented insights to inform contract decisions

Meetings to Support Phase 2 Progress
4 to 6 weeks

Progress Check
Check Pilot Progress
10 - 30 min, 1x per week

Training
Answer Pilot Team Questions
up to 60 min, 1x per week

Team Cadence
Working Session
as needed

Purpose
To cement learning and finalize a decision regarding future work.

Outcomes
1) Documented results for the Pilot Program
2) Clarity about the future of the business relationship
3) Defined scope and agreements for any following work together

Meetings to End the Pilot Program
1 to 2 weeks

Action Review
Review Phase 2
90 min

Sensemaking
What do we recommend going forward?
120+ min

Decision Making
Decide on Contract
45 min

Sensemaking
Executive Debrief
120 min

The Players

During the sales process, it's important to identify which people or teams will fill each of these roles.

Pilot Team

- **Business Lead**
  Responsible for defining the client's vision and goals for the program, ensuring the program has adequate resources and support, and making business-level decisions about the work.

- **Project Lead**
  Responsible for coordinating project resources, keeping team members up-to-date with progress, tracking project details, and scheduling work with the software provider.

- **Technical Team**
  Responsible for ensuring the software meets internal technical requirements, identifying and supporting technical integration, troubleshooting technical issues related to the client environment, and learning how support internal users.

- **Pilot Team(s)**
  Responsible for outlining the pilot use case, adopting the software to meet the use case, and communicating with the rest of the team about their experience.

Lucid: Program Provider

- **Business Lead**
  Responsible for approving the program, ensuring the program has adequate resources and support, and making business-level decisions about the work.

- **Project Lead**
  Responsible for coordinating project resources, keeping team members up-to-date with progress, tracking project details, and scheduling work with the software provider.

- **Training Team**
  Responsible for training client pilot team members.

- **Delivery Team**
  Responsible for provisioning, configuring, and deploying software and infrastructure for client use; answering technical questions, supporting the pilot team, developing new capabilities, and resolving technical issues.

Estimated Meeting Time Investment

These estimates can help both parties create an appropriate budget for this work.

Like with most large programs, participants should expect to spend more time in meetings at the program start, during major program milestones, and at the program completion.

These numbers assume a 14-week pilot program and 40-hour work weeks. To get more accurate estimates for a program with a different duration or standard work week, use the Meeting Time Investment spreadsheet.

Program Stage	Estimated Meeting Hours	% of Available working hours
Phase 1 Start: 1 week	8 hours 30 minutes	21.3%
Pilot Phase 1: 5 weeks	5 hours 50 minutes	2.9%
Midpoint Phase 1 End, Start Phase 2: 1 week	4 hours 20 minutes	10.8%
Pilot Phase 2: 5 weeks	5 hours 50 minutes	2.9%
Wrap Phase 2 End, Contract & Reporting: 2 weeks	5 hours 45 minutes	7.2%

Most program participants will only attend some of these meetings. The table below shows the estimated time in meetings for each player over the course of the full 14-week program.

Player	Estimated Meeting Hours	% of Available working hours
Client Business Lead	10 hours 35 minutes	1.9%
Client Project Lead	26 hours 15 minutes	4.7%
Client Tech Tech	6 hours 50 minutes	1.2%
Client Pilot Team	8 hours 35 minutes	1.5%
Lucid Business Lead	13 hours 05 minutes	2.3%
Lucid Project Lead	30 hours 15 minutes	5.4%
Lucid Training	14 hours 50 minutes	2.6%
Lucid Tech	10 hours 50 minutes	1.9%

These numbers DO NOT include preparation or follow-up time. Some players will need to reserve additional time to prepare for and follow-up on these meetings.

Starting Pilot Phase 1
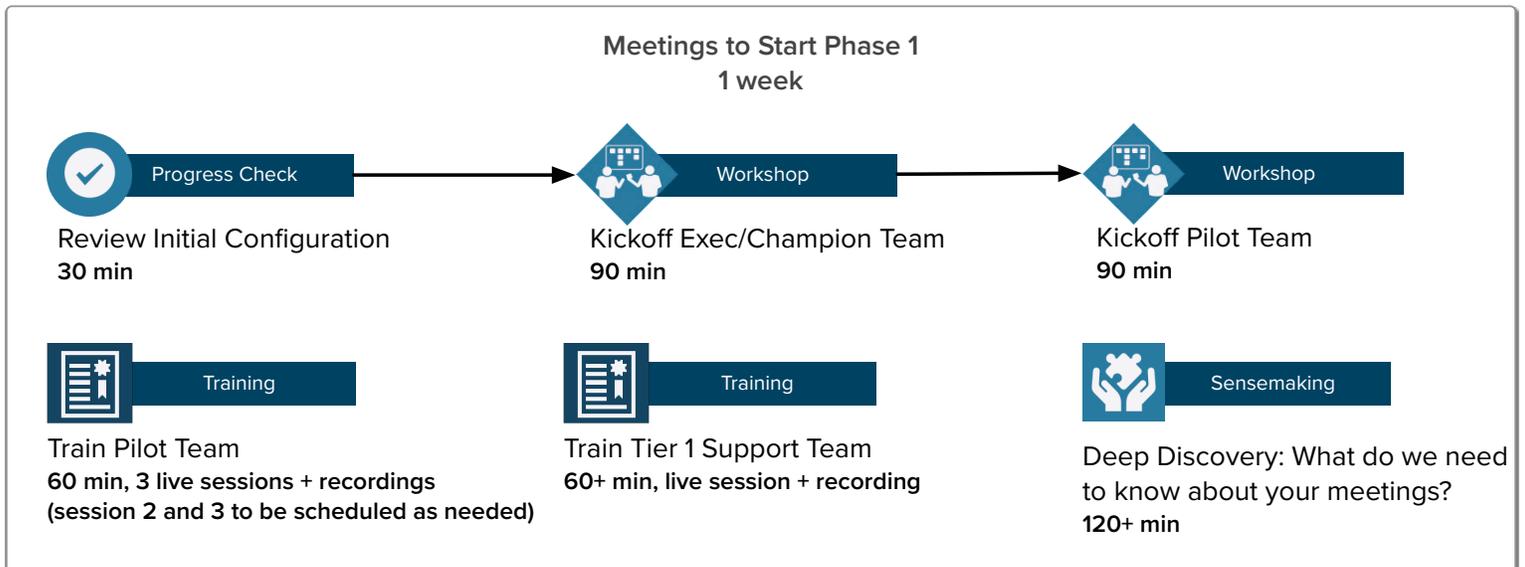
The Pilot Program officially starts once:

- the Pilot order is signed,
- the teams are assigned,
- the basic schedule is set,
- and the software is provisioned and configured for the pilot teams to start using.

Purpose of these Meetings

To ensure everyone involved in the pilot has a shared understanding of what success looks like and how we'll achieve it together.

Meeting Results

1. Defined success milestones with acceptance criteria designed by the pilot team.
2. Teams get to know each other and commit to the pilot.
3. Written working agreements, including expectations, a communication plan, support and issue handling processes.
4. The initial training is complete and the first week's pilot meetings scheduled.
5. The pilot team all knows the context-specific challenges, opportunities, and requirements.
6. The team has a draft case study vision that was co-authored by both parties.

Meetings to Start Phase 1
1 week

Progress Check	Workshop	Workshop
Review Initial Configuration **30 min**	Kickoff Exec/Champion Team **90 min**	Kickoff Pilot Team **90 min**

Training	Training	Sensemaking
Train Pilot Team **60 min, 3 live sessions + recordings** **(session 2 and 3 to be scheduled as needed)**	Train Tier 1 Support Team **60+ min, live session + recording**	Deep Discovery: What do we need to know about your meetings? **120+ min**

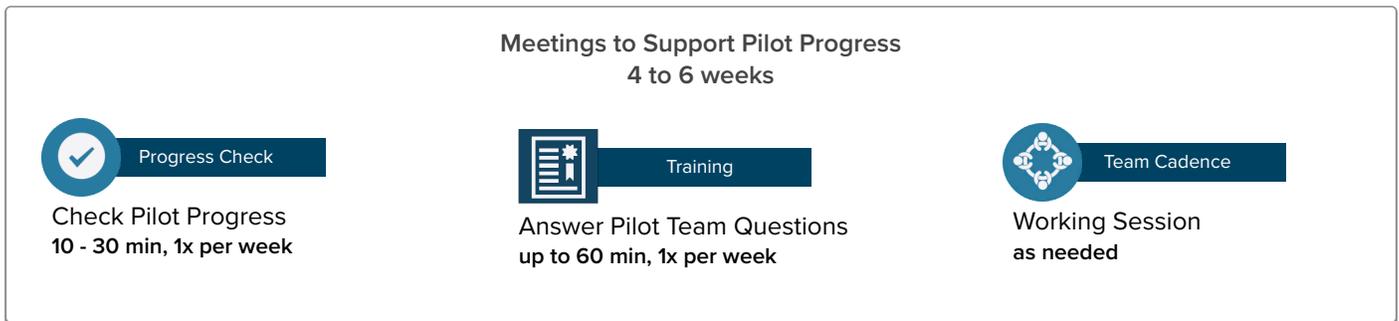| Meeting	Attendees	Time
Review Initial Configuration **Purpose**: To confirm that the software is setup the way the client wants and that the client leads are comfortable giving their pilot teams access to it. **Desired Outcomes:** • A list of any needed changes • Agreement that the software is ready for pilot business	• Lucid Project Lead, Technical Team • Client Project Lead, Technical Team	30 minutes
Kickoff Exec/Champion Team **Purpose**: To ensure a clear vision of program success for the business and commit to providing the resources required to achieve it. **Desired Outcomes:** • A draft case study painting the success vision • A designated champion to share the vision to the team	• Lucid Project Lead, Business Lead • Client Project Lead, Business Lead	45 minutes
Kickoff Pilot Team **Purpose**: To create a clear vision of program success for the team and commit to the pilot work. **Desired Outcomes:** • A list of what achieving the vision means for this team • A documented program plan & working team agreement • A list of anticipated challenges and mitigation strategies • Next meeting dates defined	• Lucid Project Lead, Training Team • Client Project Lead, Pilot Team	90 minutes
Train Pilot Team **Purpose:** To ensure the Pilot Team gets hands-on support with basic meeting features **Desired Outcome:** Every pilot team member can schedule a meeting, invite people, create an agenda, start the meeting, take notes, and export the records	• Lucid Project Lead, Technical Team, Training Team • Client Project Lead, Technical Team	60 minutes
Train Tier 1 Support **Purpose:** To ensure the client technical team can help pilot team members with basic troubleshooting **Desired Outcome:** The tech team knows how to help with calendar files, meeting access, and configuration questions	• Lucid Project Lead, Technical Team • Client Project Lead, Technical Team	60 minutes
Deep Discovery **Purpose:** To gain a shared understanding of how meetings work in the client environment. **Desired Outcome:** Documented observations and possible technical and process recommendations.	• Lucid as needed • Client as needed	3+ hours, broken into multiple short sessions

During Pilot: Phase 1 & 2

The majority of the Pilot Program involves pilot teams running meetings, asking questions, and figuring things out. The Lucid team supports the client pilot team and may be working to develop solutions for tehcnical, process, or skills gaps identified along the way.

Purpose of these Meetings

To maintain program momentum, clear barriers, and address discoveries.

Meeting Results

1. Updated progress reporting

2. Answers to questions that arise

3. Strategies and/or solutions for addressing problems

4. Documented insights and results to guide Phase

Meetings to Support Pilot Progress
4 to 6 weeks

Progress Check
Check Pilot Progress
10 - 30 min, 1x per week

Training
Answer Pilot Team Questions
up to 60 min, 1x per week

Team Cadence
Working Session
as needed

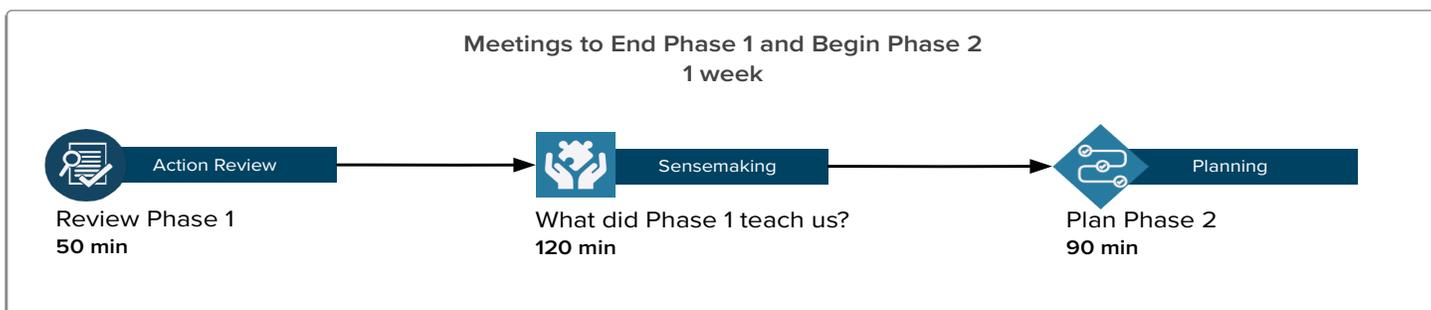| Meeting	Attendees	Time
Check Pilot Progress **Purpose:** To share any updates to the program plan and build trust **Desired Outcomes:** • An updated program plan • Documented issues and next steps	• Lucid Project Lead • Client Project Lead	15 minutes, once per week
Answer Pilot Team Questions **Purpose:** To introduce new pilot team members to the program and answer questions that arise **Desired Outcomes:** • Solutions to make the pilot team work easier • Session recordings team members can review later	• Lucid Project Lead, Training Team • Client Project Lead, Pilot Team	30-60 minutes, once per week
Working Session **Purpose:** To work through challenging configuration, development, or process design challenges **Desired Outcome:** Co-created solutions that either are or can be rapidly implemented	• as needed	as needed

Ending Phase 1

Projects that wait until the very end to review learnings and results get rushed, sloppy results. That's why we must have regular, significant milestones in our programs if we want to succeed. This milestone gives us all a chance to pause, reflect on what we've learned, and re-plan the rest of the program to ensure the best possible outcome.

Purpose of these Meetings

To cement learning and create an informed Phase 2 plan.

Meeting Results

- Documented Phase 1 results, including metrics, key insights, and recommendations

- Updated Phase 2 plan, including adjustments to success milestones, team composition, and working agreements.

- Updated draft case study, including quotes and insights from phase 1.

Meetings to End Phase 1 and Begin Phase 2
1 week

Action Review	Sensemaking	Planning
Review Phase 1 **50 min**	What did Phase 1 teach us? **120 min**	Plan Phase 2 **90 min**

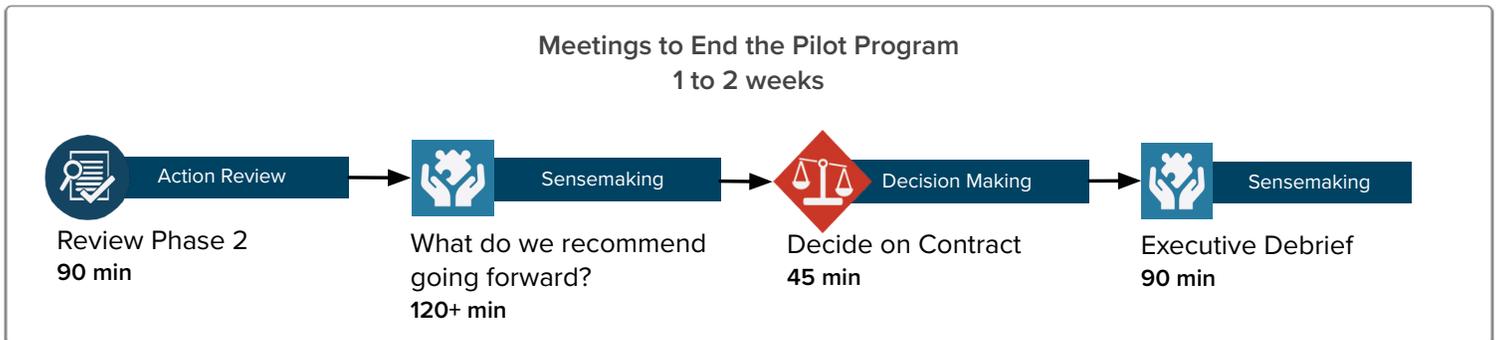| Meeting	Attendees	Time
Review Phase 1 **Purpose:** To reflect, uncover learning, and reconstitute our commitment to success **Desired Outcomes:** • Shared understanding of what happened • Recommendations for Phase 2	• Lucid Project Lead, ++ • Client Project Lead, Pilot Team, ++	50 minutes
What did Phase 1 teach us? **Purpose:** To make sense of everything we learned, clarify insights, and spitball possibilities **Desired Outcomes:** Ideas and recommendations for increasing the success of the next phase	• Lucid All	120 minutes
Plan Phase 2 **Purpose:** To incorporate what we've learned into an updated phase 2 plan **Desired Outcomes:** An updated plan, including a revised working agreement, new milestones, and any other adjustments.	• Lucid Project Lead, ++ • Client Project Lead, ++	90 minutes

Ending Phase 2

These meetings formally end the Pilot program. If we choose to go forward with a long-term relationship, we'll finalize those details now. This is also when we work together to review and confirm our results, then share those with all the business stakeholders who invested in this program.

Purpose of these Meetings

To cement learning, clarify business results, and finalize a decision regarding future work

Meeting Results

1. Documented results for the Pilot Program
2. Clarity about the future of the business relationship
3. Defined scope and signed agreements for any following work together

Meetings to End the Pilot Program
1 to 2 weeks

Action Review	Sensemaking	Decision Making	Sensemaking
Review Phase 2 **90 min**	What do we recommend going forward? **120+ min**	Decide on Contract **45 min**	Executive Debrief **90 min**

Meeting	Attendees	Time

Review Phase 2
Purpose: To reflect, uncover learning, and document our successes and failures
 	
Desired Outcomes:
 	
• Shared understanding of what happened
• Celebration of victories
• Agreement on results
	• Lucid
	  Project Lead, ++
	• Client
	  Project Lead, Pilot Team, ++
		90 minutes

What do we recommend going forward? Purpose: To make sense of everything we learned and forumulate recommendations for future work **Desired Outcomes:** Ideas and recommendations about how we should go forward	• Lucid All	120 minutes

Decide on Contract
Purpose: To formally decide on the terms of a contractual relationship
 	
Desired Outcome: A contracting decision
	• Lucid
	  Project Lead, Business Lead
	• Client
	  Project Lead, Business Lead
		45 minutes

Executive Debrief
Purpose: To share results and insights from the pilot program with the client senior leadership
 	
Desired Outcome:
 	
• A shared understanding of the value delivered
• Answers to any questions
• Identification of opportunities for future growth
	• Lucid
	  Project Lead, Business Lead
	• Client
	  Project Lead, Business Lead
		90 minutes