

Module 7: Developing the AI Business Strategy using the "Ignition" Process

Lesson 8: Meeting Rhythm

Meeting Rhythm

A meeting rhythm is when you follow a consistent cadence of specifically structured meetings designed for specific outcomes, and everyone knows about the meetings and what they are for:

- **Daily** huddles keep everyone connected and focused on the task at hand.
- **Weekly** meetings focus on tactical issues and keeping team members aligned and accountable to each other.
- **Monthly** meetings provide a platform for ongoing insight and training.
- **Quarterly** and **annual** sessions provide a platform for strategic thinking.

By keeping to this rhythm, organizations can practically eliminate chaos and confusion, accelerate the decision-making process, and cultivate an environment of open discussion and ready collaboration.

The ChiefAIOfficer Co-Pilot will help you implement the rhythm, document the meetings, and provide key insights on next steps.

A few guidelines for the meeting rhythm:

- 1. Meetings always start on time and end on time.**

Let everyone know this zero-tolerance policy is in place because you respect their time.

When you lead by example and consistently start the meetings at the scheduled time, the team discovers who respects others' time and who doesn't.

And that environment of peer accountability snaps the slowpokes up within a few meetings.

2. Follow the agenda.

For the most part, daily and weekly meetings should have the same agenda every time (more to come on that).

Quarterly and annual will follow the same agenda for the most part, with occasional adjustments for pressing and unexpected issues (like a pandemic).

3. Meetings should have a clear objective.

The top of the agenda should clearly state the ideal outcome of the meeting so everyone is clear on what we're there for. This helps keep the conversation focused and not in the weeds. If it's an ideation meeting, that's fine, but be clear about the ideal outcome of the meeting.

And part of the meeting's ideal outcome means every attendee walks away with action items or new insight.

4. Limit Meetings.

Issues are constantly popping up, and scheduling a meeting right away can be tempting. Any meetings outside of the Meeting Rhythm should be well thought out.

Teach the team to ask questions like these before calling for a meeting:

- Can this wait until the weekly meeting?
- Do I need outside input to make progress?
- Does moving forward require a real-time conversation, or would an email, text, or Slack get the result I'm looking for?
- Does this really need to be a face-to-face or Zoom meeting?



Daily Huddles

These are especially important in fast-moving business environments, like in a start-up or when preparing for a product launch.

The huddle is a “stand up” meeting and starts at the same exact time every day - typically at the start of the workday.

Set the expectation that everyone will attend and participate on time every day.

The daily should be a quick check-in, with each person taking at most a few minutes and following the same agenda every day. The idea here is not to get too comfortable or start chatting about anything other than the agenda.

The agenda should be something like:

- What did you do in the last 24 hours?
- What are you going to accomplish in the next 24 hours?
- Where are you stuck?

These three focused questions help ensure no impediments to anyone’s progress; if there are, you find out within 24 hours. And when the team knows there are daily accountability check-ins, they deliver results.

If something comes up in someone’s check-in that can’t be quickly resolved on the spot, the conversation can be continued outside of the huddle.

For virtual teams, the huddle should be a conference call. Just be sure to keep on track. When people sit comfortably at their desks, it becomes very easy for the meeting to become a strategy discussion or gab session.

Remember, the daily efforts, the small wins, accumulate to massive success. Start your daily rhythm today and see the transformation it brings to your organization.

Weekly Meetings

Think of the Weekly Meeting as a synchronization hub. It is the meeting that all others are scheduled around.

This is where everyone aligns, ensures collaboration, and leaves with clarity on the week's priorities. It keeps the organization continuously moving toward the vision outlined in the AI Business Strategy you developed.

Every department should have a weekly meeting, including the leadership team.

The weekly meeting agenda should look something like this, with the bulk of the time being for the Parking Lot:

- Good news (everyone shares a quick piece of personal or professional good news)
- Updates (new team members, news from a client, etc.)
- Rocks (quick check to see if everyone is on track with their rocks)
- Scorecard (reviewing last week's numbers)
- Action items (review to see if all action items from the week before were completed)
- Parking Lot (anything that came up during the week or came up earlier in the meeting that needs a solution)

The weekly meeting can be 30-90 minutes, with the leadership team weeklies typically being on the longer end.

Some teams will find that the meetings can effectively take place every other week. You'll find a rhythm and agenda that works for you.

When done right, the Weekly Meeting becomes a powerhouse for alignment, strategic focus, and effective execution. Stick to the agenda, engage everyone, and this weekly gathering will be a force multiplier for the organization.

Monthly Management Meetings

The Monthly Meeting is *management only* and is a chance to get together for learning and collaboration.

The agenda for this one varies depending on the organization and often varies from month to month depending on the current situation that the business is in.

Potential topics include:

- CEO updates/company news
- Departmental updates
- Significant issues that need addressing
- Team bonding opportunities
- Insights into industry trends or competitive analysis
- Sharing lessons learned
- Celebrating successes
- Training on new tools, leadership, etc.

Remember, as a CAIO, you will be looked upon to help develop talent. And growing businesses need growing people. Make learning a priority.

This meeting, in particular, results in the company's leadership having more profound insight into the business strategy and AI's contribution.

Quarterly Planning

The Quarterly Planning Session is a structured check-in that brings the leadership team together. Ninety days is about the right time for rock deadlines, making this a good time period to check back and set new goals to drive initiatives forward.

During Quarterly Planning, you will review the last quarter, align on key objectives for the upcoming quarter, and keep everyone on the same page.

The people participating in these sessions are the same people who were part of the Ignition - ideally, the CEO and those who report directly to them. That said, once the leadership team Quarterly is complete, it should be soon followed by a departmental quarterly meeting. Each team lead will take the initiatives agreed upon by the leadership team and cascade that plan to their own team to set departmental and individual rocks and review the scorecard.

Your **Quarterly Planning agenda** will look something like this (find what works best for your business):

- **Expectations for the meeting:** Go around the room. Note expectations on an easel-sized Post-it or whiteboard.
- **Review prior quarter:** Rocks, scorecard numbers, and other important numbers.
- **Grade the previous quarter (A-F):** Quick around the room to track quarter-over-quarter progress.
- **3 Questions review:** Take turns around the room. Note on the whiteboard responses for each category (see the homework section below for more details).
- **Customer/competitor/industry updates:** Quick check-in to see if there is anything to add to the Parking Lot in this regard.
- **Vision summary review:** Review each section, confirming that the vision has stayed the same OR make necessary adjustments.
- **Org chart review:** Decide as a group whether there are any positions to revisit or team members to discuss during the Parking Lot portion of the meeting.



- **KPIs:** Back to the scorecard to determine if adjustments should be made, new metrics added, or old ones removed.
- **Process discussion:** What processes must be identified, evaluated, and/or documented?
- **Identify new company or departmental rocks and team member rocks** based on the day's agenda discussions, ensuring they align with the one-year goals and greater vision.
- **Parking Lot:** Identify the top priorities on the list and start making your way through to resolution. If you've got a lot of items, prioritize the top 3 and start there. If you don't get to everything, the remaining items can be added to the departmental or leadership team weekly meeting parking lot.
- **Conclude:** Identify all action items to be completed, by whom, and when, including any information that needs to be cascaded out to the rest of the organization.

Pre-Quarterly Meeting Homework for Attendees

1. **Numbers:** Bring any numbers that you're responsible for reporting on
2. **Answers to 3 questions:** What should we stop doing? What should we keep doing? What should we start doing?
3. **Rocks:** Ideas for new individual and team rocks for the coming quarter

Plan for this meeting to take the better part of a day, typically about five hours.

Like the Ignition, these meetings should be held off-site, without distractions.

Keep notifications off and phones put away.

This meeting provides the leadership team with the environment to pause, reflect, and plan, aligning the organization to move in the same direction with clear and achievable goals.



Annual Planning

Your annual planning is a strategic ritual that gets your organization aligned. It's about translating that high-level vision into the next actionable steps that will move you closer to the BHAG. From setting priorities to aligning with the overall vision to crafting a financial roadmap, it all comes together to form a cohesive, powerful strategy for success.

These sessions set the tone for the entire year, providing clear direction and momentum.

Annual Planning will ideally be a two-day engagement, with a team dinner celebration at the end of day one.

The Annual Planning Session will look like an extended version of your Quarterly Planning Session. This is also a great time to:

- Launch new initiatives
- Have presentations from select departments
- Conduct some team building, get-to-know-you activities
- Dig deep into financial reports and budget allocations
- Introduce new tools
- Revamp your org chart
- Reconnect to core values
- Clean up your parking lot

Soon after every annual planning session, conduct an all-hands meeting where the CEO or Founder shares any update to the vision. Be sure to have it recorded and distributed after the all-hands so employees can refer back to it.