Hello and welcome to Module 7 Lesson 8 Meeting Rhythm.

Here are the meetings that we recommend here at Chief AI Officer. It looks like we're adding a bunch of meetings to your calendar but really the idea here is to be removing meetings, including those ad hoc calls and things like that.

This should, I mean not entirely, but this list of meetings should really be able to encompass much of that information or much of those topics so that you're not having to have your calendar filled up with a lot of meetings that oftentimes, frankly, people feel like are a giant waste of time.

So, start with your daily huddles. The point of this is to keep everyone updated and focused on the task at hand. You can set this up however you want. Some people do this where like their whole organization joins if it's a smaller team but generally it should be at a departmental level. And the agenda here is to have each person go around and just give a quick update.

My preference is to have each person say what did they do in the last 24 hours, what are they doing the next 24 hours, and what are they stuck on. So, if they're stuck on it, it just means they're waiting for approval from someone. There's some other action that needs to take place in order for them to get to complete a task.

And it should just be a couple minutes per person. So, just a quick go around.

Weekly meetings. This is an opportunity to go through tactical issues, alignment, accountability. This is when you give updates on your rocks.

Monthly meetings are just for the management team. This is basically for anyone who has any direct reports. And this is an opportunity to get updates on products or new offerings. This is also an opportunity to get updates on any changes within the organization that they need to be aware of. And then it also provides training. You can bring in outside people for training. You can train on new products, new tools that you're using within the organization.

I think this is a great time to talk about process documentation. You can work as a team on doing a one process map per session. Those are all sorts of ways that you can use the monthly meeting.

The quarterly planning session. You've heard a lot about this so I'm not going to really get into it, but this keeps you on alignment with your vision.

And same with the annual planning. You extend it a bit so that you can do what you do with the quarterly planning, but you can also do some training and some team building. This is just for the leadership team. And, this is also when you'll review or revisit your three-year vision.

Okay, so where do we store the data from our meetings?

You'll soon be able to do this on our software and there are other software tools that will save this data for you. But you could also just do it in whatever tool you currently have access to. It can be on G-drive. It can be in your project management software. Get creative.

As long as the people who need to access it can access it and the people who need to update it, can update it. You're good.

How long should meetings be? And what if we go over?

It's going to depend but roughly huddle should be about 15 minutes. The weekly meetings will really depend at the leadership team level, that's usually 60-90 minutes. At the departmental level, that's usually 30-60. The monthly calls are usually 1-2 hours for the management team.

Quarterly planning at the leadership team level should at least be half a day. At ChiefAIOfficer.com, we spend a couple of days on our quarterly planning. At the departmental level, it's shorter. It's usually about 3 hours. And then the annual planning should be at least a day. We spend at least 3 days on our annual planning but one important point that I think is important at least is to take the quarterlies and the annuals at the leadership team level to take those off site.

So get out of the work environment. Put the phones away. Put the laptops away. Like really be focused on the task at hand. And you shouldn't be going over. Start on time and end on time.

Okay. Does everyone participate in quarterly and annual planning?

Again, the annual planning is just at the leadership level but everyone participates in the quarterly. So even though the leadership team is doing annuals, the departments will still do quarterlies when the leadership team is doing after the annual.

So basically the way it works is the leadership team will have their quarterly planning or annual planning. And then those team members will then go and work with their own team at the departmental level and have their quarterly planning. So like rocks, it'll just kind of roll down and it just sort of fits with that cadence.

How should outcomes of leadership team meetings be communicated to the rest of the organization?

This is a great question. As I mentioned in a prior lesson, when the leadership team gets together and has these planning sessions, ideally off site, right? So that then they get really curious. Where are they going? What are they talking about? What's happening at the beginning? It often makes the rest of the team nervous.

So it's really important to, while you're together, get clear on the messages that are going to be shared with the rest of the organization and have an all hands meeting where everyone gets the update all at once.

Or if that's hard to pull off, you could also do a video that gets shared with the entire organization. How do we keep people on task? Well I recommend having a facilitator. Having an outside facilitator isn't always realistic. If you can do it with your with your leadership team quarterlies and annuals, I think it's worth the money because then you just have someone that knows what they're doing and they're not married to any particular outcome.

So there's sort of a neutral third party that can then help you come to decisions. But within just the regular sort of day to day, it's still best to identify someone as a facilitator. Basically, whoever is comfortable and tactful at cutting people off if they get off. That is the person that should facilitate your meetings in the case of remote or hybrid teams.

Remote teams can work or can meet basically just like this on a zoom. That's, no worries. If it's a quarterly or annual planning event, I really strongly suggest that you try to get people together in person. Doing those over conferencing platform is frankly quite tiring and it's too hard for people to not get distracted with multitasking. People just kind of start to daydream. It's really hard to keep people on task. If you absolutely have to do it, like if you have an international team and you don't have the funds to bring together. One way to do it is to break it up so you could do, like three hours on here, three hours there.

The risk with that is that people tend to forget what was discussed in the prior session and you don't really get your momentum until you're a couple hours in. So it's tricky, same with remote or with hybrid teams. I've certainly done several quarterly planning sessions that successfully pulled that off where most of the team was together in an offsite location and there is someone in another country or something that just couldn't make it and they joined via zoom. And it's okay. It works. They still felt part of the the session. But it really would have been ideal, I think, for all if they were there.

So here's some meeting guidelines. Start on time. End on time. Respect people's time. First of all, don't show up late for meetings, especially if you're the one that called the meeting as much as possible. Everyone should show up a minute or 2 early so that the meeting can start on time and acknowledge that people schedule other things to happen directly after the time is over.

So, even if you're not able to get through all the topics that you want, then you can utilize the parking lot, which is there on bullet 3. The parking lot is what we use to store topics that we want to make sure that we come back to again. So a few scenarios one is that, that there's something that comes up that's not on the agenda, but it's important. So we just put it on the parking lot. So we know we'll come back to it.

It can be stored in a central location. So if things come up during the week that people want to make sure gets discussed, then they can add it to the parking lot. And it will come up again on the team call. In the case of a of a weekly meeting and in the scenario where you're starting to go over, you can just put it onto the parking lot and say, "Okay, where this will be the first thing that we'll discussed next week, in any meeting that is. It does not follow that list of meetings – the daily huddle, the weekly, the monthly, et cetera.

Make sure it has a clear objective. Is this meeting to share information? Is this meeting to strategize? Is this meeting to get clarity? What is the purpose of the call or, the meeting in person? They can't prepare properly and there's no way to judge whether it was actually worth their time because they don't know what the point was.

Follow the agenda, no tangents. So your daily, your weekly, not necessarily your monthly, but your quarterly and your annual should all have an agenda. It should be pretty simple to keep on the agenda, especially if you have a designated facilitator. For meetings that aren't part of that particular cadence that I listed, ideally provide an agenda when you provide the objective. Make sure that everyone who's attending needs to be there.

They're there either provide input or they need to get the information directly. And they know what they're there for. And if you provide all that information ahead of time, people might find that they don't actually need to be there and they can kind of check in with you and say, "Hey, you know, I've got this other thing going on." We don't want to put time on people's calendars that that is just wasting their time, right? Anyway, I think I'm going on a tangent. So follow the agenda as much as possible.

Encourage healthy conflict. We don't want people to be mean or rude. Certainly, but I have been in so many rooms where there is someone in attendance that can see an issue that's coming up as a result of a decision that's being made. Or they see a solution to something that takes us forever to get to. And they didn't feel like their voice could be heard or they were sort of afraid of conflict. Encourage that conflict as much as possible. You can save so much time. You can help your team members improve themselves. You can help them be better at their job. Healthy conflict is a really good skill to have so encourage that as much as possible. Conflict, frankly, is a sign of a healthy team.

We talked about having a facilitator. It also can be helpful to have a scribe in situations like your quarterlies or your weekly calls where there's updates on things like rocks. So someone can note those updates. When there's parking lot items that need to be added, that sort of thing, it's helpful for the facilitator if they're not also the person who's taking notes.

And then keep meetings to a minimum. As I mentioned, be respectful of people's time. Make sure that anyone that you invite to a meeting actually needs to be in that meeting.

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This list of meetings should really be able to encompass much of that information or much of those topics so that you're not having to have your calendar filled up with a lot of meetings that oftentimes, frankly, people feel like are a giant waste of time. So, okay, start with your daily huddles. This is the topic.

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