

EPISODE 016: HOW TO LEAD A TEAM MEETING

BY NANCY RAY

Intro

When I first started leading my team, I would host weekly team meetings. I thought I was really good at them, but over time, while my team members were really good sports about it and very gracious with me, they let me know I covered a lot of information that didn't really pertain to them. Sometimes it felt like a waste of time. I wasn't really sure how to lead it or what to cover. They would be long, and we'd often get distracted. All in all, I needed a solution, and thankfully I found one. We now have a team meeting formula that we follow, allowing us to connect, to pay attention to the most important things that move our business forward, and they last no longer than 90 minutes. They happen regularly, and we don't waste anyone's time. Today I'm going to share that team meeting formula with you.

You're listening to Work and Play with Nancy Ray, Episode 16.

Much of our daily lives can be divided into two categories: work and play. Simply put, that is where our life and our legacy take place. This is a podcast all about learning to work and play well, which leads to a healthy soul and a fulfilling life.

Content

Today, I'm simply going to walk you through the itinerary of our team meetings from start to finish. We followed this schedule every single time we host a team meeting, and it helps us stay on track and focus on the most important things that move our business forward. We also allow a significant portion of time to deal with issues, which is an important part, and is inevitable in every business. After I walk you through the itinerary, I'm going to share with you three ways that we make our team meetings fun. The first thing I need to tell you is I learned all of this from the book *Traction* by Gino Wickman. It is one of my favorite business books. It's incredible, and they are the ones that created this team meeting itinerary, and it's been so helpful. A lot of the things I'm going to talk about in the team meeting are concepts and ideas from this book.

If you're curious to learn more about scorecards, or people headlines, or how to deal with issues, I want you to go buy that book. I will leave a link in the show notes. It is incredible. With that said, let's jump into the team meeting. Now. It's important to know that it is a 90 minute team meeting, and so I'm going to tell you bit by bit, what we cover, and what we do, and the time that we have allotted for each thing. Because, it's really important that you stay on time.

Every team meeting we start with prayer, and good news. We open our team meeting with a word of prayer, and then each member of the team and our leadership team, we go around and we share two pieces of good news. One piece of personal good news, and one piece of business or work good news.

All of this should take five minutes total. It's pretty brief. We get right to it, but it's a great way to socially connect with each other as we begin our team meeting. Now, the second thing we tackle is we review our scorecards. Every single person on our team has a scorecard. On that scorecard is like a weekly report cards, so to speak, for the things that we are responsible for. They include metrics to see if we are attaining those goals or if we're falling short, and they really are goals that we set to push us forward. It's very rare every week that we all have our scorecards filled out, and that we've reached all of our goals. They're really to push and stretch you, they're stretch goals. Each member of the team goes around, we go around in a circle, and we report on our scorecards.

What are the things we're struggling in that we aren't reaching our numbers for? What are the things we're doing well at? Is there anything that we're ahead of schedule for? We just talk a little bit about the things that we are individually responsible for. That takes no longer than five minutes. Then we jump into our rock review.

If you don't know what I'm talking about when I talk about rocks, that's simply a word that we use for our quarterly goals. We set quarterly rocks, which means they're the most important things to move our business forward. We Go around yet again, we have company rocks, we have individual rocks. Are we on track or off track in those quarterly rocks? I'll literally say, "Here's the goal, on track or off track? Here's the goal, on track or off track?" We just go down very briefly. We don't explain ourselves if they're off track, we just say whether or not they're on track or off track.

This really is so important, and keeps us so tuned in to whether or not we're doing the things that will really, that really matter in our business. When we set rocks, we take time. We say, "These are the most important things we need to accomplish and do this quarter, to move towards our financial goals, our business goals. This is it." By checking in every single week to see if we're on track or off track with those quarterly goals, it keeps us accountable, and it keeps us moving in the right direction. Now, this is an important piece of the team meeting, but again, it should only take five minutes. So we bring up our rocks, we review them, everyone goes around and says, "On track or off track," for their goals or their rocks for that quarter.

After five minutes we move onto the next thing. The next thing we share is awesome. It's so much fun. We call it people headlines, and this is simply a way to share within our team, the things that are being said about the work that's being done. So, Whether it's a good thing, or whether it's a bad thing. Whether we've gotten a good review, or maybe a critique or some bad feedback. We share it all during people headlines. This really is so sweet, because for a long time in my business I never knew what to do with the emails that would come in that that

said, “Thank you so much for this, that, and the other. It blessed me so much on my wedding day, when you did this thing.” Or, “Hey, I’d really appreciate it if you went about this in a different way.” like, What do you do with that stuff?

Well, when you have a place for it in a weekly team meeting, it’s so meaningful because we can hear those things, talk about them, make improvements, or really know the things that are going well for us, that we’re doing it right. That should take about five minutes. We also open up time, you know, it’s not just the leader of the team meeting that the shares people headlines. I always say, “Does anyone else have a people headline they want to share? This can be an email, it can be an Instagram direct message, it can be someone stopping you in the grocery store. It can be anything that you’ve heard about our business in the last week. Share it here.” It’s so awesome to hear. We’ve literally cried several times at this point in the team meeting, because of the meaningful things that people have shared. Now, after sharing people headlines for five minutes, we have actually added this own little section ourselves.

This might not pertain to you. It probably won’t actually, unless you’re a photography business with a team. But, we put in five minutes of scheduling equipment, because we have a studio where we have to schedule equipment, and a lot of times it requires us discussing who takes what where. So, building that into our team meeting really opened up communications because, that was an issue for us a long time ago, that we weren’t super clear on that, so we built it into our weekly team meeting.

After talking about equipment scheduling for five minutes, we take 55 minutes to talk through issues. Okay? If you don’t have, if you don’t have to talk about scheduling equipment, then you can just put that extra five minutes towards issues. This is when you tackle the issues list. Here’s how this works, every business has issues. Every business has issues. There’s technology issues, there’s personnel issues, maybe people aren’t getting along well, maybe you have a problem with something, maybe some piece of equipment isn’t working right.

Whatever it is, maybe there’s a launch or something that you’re planning, and something comes up, and it’s not going the way that you thought it would, right? This happens. This is just a part of business, and if you plan for an hour a week to really intentionally discuss the issues, it is going to make your business so much healthier, and open lines of communication so that you can actually deal with those issues early on when they rise up, and then continue forward. You want to take about 60 minutes to go through these issues, and this is how you do it. You make a list of issues. I always have a list that I bring and then I say, “Does anyone else have an issue they want to add to this list?”

Sometimes they say, “No.” Sometimes they say, “Yes, this thing.” Sometimes people have three things they want to talk about, so we add it to the issues list. Then we choose the top three issues of that whole list that we want to talk about right now, and we organize them, one, two, and three in order of most important.

By prioritizing those issues, we’re talking about the most important thing. Here’s where it really matters. What we do with these issues is we do what’s called IDS. Identify, Discuss,

and Solve. First of all, you identify the issue, what is it? You discuss the issue as a team, and then you solve it. Who is going to do what to make sure that this issue doesn't come up again, to solve this issue? What, what's the solution here? This was really key for me, especially as I came from this old habit of leading team meetings where I just would talk about things and we would, we would identify issues, we would discuss them, but we would never kind of bring them to a close, and complete them, and assign them to someone, and then move on.

The rule is, as you are working through your issues, you do not move on to the next issue until you IDS an issue. Once you do that, then you can move on to the next issue. Now you think, "Oh 60 minutes, I've got time to go through, you know, 15 issues in my business." Wrong. You would be so surprised at how often we might get through two or three issues in a meeting. Because we take the time to IDS them, it's really helpful. They never come back up again.

Or, maybe if they do, we know how to go back, IDS them again, and then move on. But because of that, we're really thorough with the issues. We make sure there's a solution, and then we move on. Sometimes we will get through about six issues in a meeting and it's awesome. It just depends on the nature of the issue, and how much needs to be talked about, and how complicated the solution could be. So, 60 minutes for discussing and solving issues. Now, what happens if there are leftover issues that you didn't get to? Well, you just save them, and you bring them to the next weekly meeting. That's what's so great about these weekly meetings, is you want them recurring, you want them happening every week at the same time, the same place, so that they're predictable.

Leading a team is something I'm passionate about, and I've compiled a few of my favorite resources for you for free. Just head to NancyRay.com/Team to get our favorite hiring questions, an outline to our team meetings, links to our favorite team books, our team retreat itinerary, and more. Again, that's NancyRay.com/Team.

Okay, going back to the itinerary. After 60 minutes of tackling your issues, you move on to your to do lists. Now, these are more than just to do lists. These are weekly commitments. You talk about them one week. You say, "I commit to do these things by the time of our next team meeting." So you go through, "Okay, what are the things we discussed today, or that came out of this team meeting that are my takeaways that I needed to do?"

Often times that does come from the discussion on the issues list. You take some of those issues, and you solve them. Different team members take different ones. Sometimes it's just something that comes out of the scorecard discussion that you're like, "Hey, I'm really behind on my scorecard in this area, this is a to-do for me." But, the most important thing is that as you are going through this team meeting, it's reminding you over and over again, of the most important things that you need to be doing to move your business forward with your quarterly rocks, with your scorecards, as well as the issues that you need to tackle to keep things running smoothly.

So, you share your to do list, or your one week commitments. Again, this is like rapid fire. At the end we say, "Okay, what are our to do list?" And we each say, "These are the things I need to do this week. These are the things I need to do," one by one, go around in a circle and share those things. That should take about five minutes.

The last thing that we do, is we conclude the meeting. After we share our to do lists, we rate this meeting one through 10. This is a great part of the meeting because it's really telling you as the leader, whether or not your people think that this is a meeting worth their while, whether or not we're accomplishing meaningful things, whether or not we're managing this time well as a meeting. We go around and rate them one through 10. It's whatever you decide, 10 being the highest, one being the lowest, rate the meeting one to ten.

We go around in a circle and do that, really less than five minutes. That takes about 30 seconds. But you've got that five minutes of buffer time at the end to share any concluding thoughts, thank the team, and then go about your work day. Now, can you imagine having this team meeting and how productive it could be, and how beneficial it would be for you and your team members? You're going back to the things that matter to you, that are moving your business forward. Again, gaining traction. Again, if you want to learn more about any of the things I discussed in this team meeting itinerary or outline, get yourself the book, *Traction*. It is so helpful, and so good, and really gives you an understanding for a lot of these things. Now, I want to tell you three ways that we make our team meetings fun.

This is super important. The first way that we make it fun is we have this rule that anybody at any time can call tangent, okay? If somebody is getting distracted, or sharing about their favorite ice cream shop, or their favorite song on the radio, or whatever it is. And, "Oh, that reminds me, let me tell you about this thing." Anybody at any point can just say, "Tangent," randomly. What that does, it makes it funny, but it also kind of brings you back. What we've started doing, which is kind of funny, is we'll just say, "Okay, I'm calling a tangent on myself here. Sorry." We rope ourselves back in because we're used to staying on track with the topics, and sticking to the timeline. I mentioned that we rate the meeting one through 10, and that is really the second way that you can make it fun.

I think everybody on our team looks forward to rating the team meeting at the end, and it helps us kind of want to raise the bar every single time, to make sure that we're doing a good job, and staying on task. I think that it is a way to make it fun, is simply to rate the meeting. And third, this is kind of our own twist on it. Have your own rules for what makes it a 10. For us, we've joked throughout the years it doesn't reach the status of a 10, a level 10 team meeting unless somebody cries because the people headline was so good, unless we start on time and finish on time, unless somebody brought some delicious food of some kind, it could even just be a bowl of Starburst, or it might be an entire Mexican feast on Cinco de Mayo.

We've done all of the above, but have your own rules for what makes it a 10. Everybody has to be present, maybe. You get to decide what that is, but it's really fun to say, "Okay, oh my goodness. We're all here, we started on time, we ended on time, there is delicious food,

someone cried, and it was an amazing day full of really needed discussion.” Boom, you have a level 10 team meeting. The goal is obviously every time for it to be a level 10 team meeting, because you want it to be productive and worth everyone’s while, but really you want to have fun too. I hope you enjoyed our itinerary of how we host really productive, efficient team meetings, and three ways that we call it fun, by calling tangent, rating the meeting, and having your own rules for what makes it a 10.

Thanks for listening to Episode 16 of Work and Play with Nancy Ray.

Everything I’ve mentioned today can be found in the show notes at NancyRay.com/Podcast/16. Don’t forget about your free team resources, including a free downloadable team meeting template at NancyRay.com/Team. As always, you can find me at NancyRay.com, or Follow me @NancyRay on Instagram or Facebook almost daily.

I’ll close this episode with a quote by the legendary Michael Scott.

“Sometimes you have to take a break from being the kind of boss that’s always trying to teach people things. Sometimes you just have to be the boss of dancing.”

Hey, if you want to include dancing as part of your team meetings, go for it. Here’s to your team meetings being productive, efficient, and fun. Thanks for listening, and I’ll see you next time.