



# MEETING GUIDE

## THE PROBLEM

Do you find that your meetings are not  
are not interactive enough - always  
the same people that participate?

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You often find yourself monologuing  
to get information out to your team?

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You often end your team meetings  
with the feeling that that things are  
not progressing as expected?

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You are weary of being the  
person responsible for facilitating  
your team meetings?

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You don't have time to prepare  
for your meetings: if you have an  
agenda (you're already a step ahead),  
is it really optimal for creating  
the kind of effective interactions  
you want for your team?

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Here is our practical guide  
**'EMPOWER YOUR TEAM'**,  
with 5 simple and effective  
techniques to make your  
team meetings highly  
interactive, inclusive and  
productive.

# 1. IMPLEMENT A « CHECK-IN » AND « CHECK-OUT »

The check-in allows you to engage participants at the beginning of the meeting, so that they become part of the conversation. It allows you to leave any concerns at the door, to encourage a higher quality of presence from the participants. It can also, depending on its focus, gauge the mood of the team. The check-in allows everyone to have their say from the beginning of the meeting and to create the confidence to express themselves.

## EXAMPLES OF « CHECK-IN :

- › What word describes the mindset
- › What word describes the state of mind in which you arrive?
- › What is your weather forecast for the day?
- › Are you green, yellow, or red when we meet?
- › What do you want us to accomplish for our meeting today?
- › What is your celebration of the week?

The check-out allows the meeting to be concluded with clarity. It can be used to summarize discussion points, identify what has been learned, clarify next steps, and adjust for the next steps. It allows participants to commit to implementing their next steps.

## EXAMPLES OF « CHECK-OUT :

- › What do you leave our meeting with?
- › What was useful in our meeting today?
- › What was helpful in our meeting today?
- › What are your next steps? actions to take?
- › What can we do differently to be more effective in a future meeting?

Experiment with "check-ins" and "checkouts" according to your intention, be creative and define your question according to the time you want to spend on it. You notice the positive impact very quickly.





## 2. CREATE A DREAM AGENDA

Your dream agenda is the one that allows you to reach your team goals, and that promotes in-depth discussions on your objectives, challenges, opportunities and solution options. It encourages the exchange and participation of all. It, therefore, allows you to nourish the team dynamic while achieving your business objectives.

### SOME QUESTIONS TO ASK YOURSELF :

- › What are our meeting objectives?
- › What questions do we want to answer?
- › How does the agenda support our objectives?
- › How does the agenda allow for an optimal balance between operational and strategic conversations?

### EXAMPLE OF A DREAM AGENDA AT O2COACHING:

1. Check-in: Sharing of our celebrations of the week
2. Validation of the objectives of the meeting
3. Review of key KPI's - exchange on what needs to be adjusted
4. 4. Operational review of our client projects
5. Deep Dive: Discussion on a strategic on a strategic topic to be explored further
6. Varia as needed
7. Conclusion: Summary of key elements priorities for the week ahead, next steps and communication
8. Check-out: What do we take away from our meeting?

### 3. SET MEETING STANDARD

Like "checking-in," setting standards for how we want to behave in meetings builds trust and effectiveness

#### TRY IT WITH YOUR TEAM BY ASKING:

What are some norms, for operating principles, that we can set for ourselves to create a safe yet effective space for dialogue?

#### EXAMPLES OF MEETING NORMS :

- › Confidentiality
- › Saying things the right way
- › Trusting each other
- › Non-judgment and vulnerability
- › Sharing and accepting
- › Sharing and accepting differences of opinion
- › Sharing in a fun way
- › Mindfulness and listening (disconnection from electronics)

- › Have a strategic posture
- › Trust our complementarities
- › Be solution oriented
- › Open camera on Teams
- › Make decisions by voting
- › Agree on team decisions

Give yourself a maximum of 3 to 5 norms. The exercise is most valuable when done with the team. By developing and agreeing to norms together, it will be only natural to adhere to them and to allow ourselves to be called back to order when necessary, when we are not fully meeting our norms.



## 4. SHARE FACILITATION AND DIFFERENT ROLE

Most of the time, managers find themselves playing the role of meeting facilitator participant, time keeper and focus focus, scribe, challenger and decision maker. Wearing all these hats makes it more difficult to develop a difficult to develop a global and strategic perspective on the and strategic perspective on the course of conversations.

Sharing certain roles allows everyone to to participate and optimizes your effectiveness through what I call team comanagement. Here are some examples of role:

- › **Facilitator:** makes sure the objectives are clear and facilitates the meeting to stimulate interactions
- › **Keeper of focus and time:** ensures that that the conversations remain focused on the achievement of results in the given time
- › **Note keeper:** summarizes the points of the discussion and takes notes
- › **Fist to five:** forces positioning by asking for a vote

- › **Challenger :** Invites the group to question the status quo, to step out of their comfort zone and consider unlikely scenarios.
- › **White Elephant:** notices when there are discomforts and names them or invites people to express them.
- › **Decision - Solidarity:** ensures that after discussion, an action is identified with a leader and a time frame, and that everyone is in solidarity.

Alternating roles from one meeting to the next allows people to experiment with different, sometimes less natural postures, and encourages everyone's active involvement while creating commitment.



## 5. LEAD THE MEETING WITH A FACILITATOR'S POSTURE

The facilitator's posture involves stimulating exchanges and asking questions to enhance the more traditional approach of sharing instructions and information. This posture enriches the conversation, makes the meeting very dynamic and participatory, and includes everyone's ideas, to consider the problems from different angles and find innovative solutions.

### EXAMPLE OF MEETING MODERATION IN A FACILITATOR'S POSTURE:

#### Set a framework

- › Review the agenda and team norms
- › Conduct a check-in and check-out
- › Ask participants what role they want to play (focus and time keeper, note keeper...)

#### Identify the objective to be achieved

- › What do we want to accomplish? What are our goals?
- › Does our agenda allow us to achieve our goals? If not, let's adjust it according to our needs.

#### Develop Solutions

- › What are our options? What else can we do?
- › What are our obstacles? What are our opportunities?
- › Who hasn't given their opinion?

#### Conclusion

- › What did we accomplish?
- › How did we collaborate? How can we improve?
- › What are our next steps? Who needs what to deliver?

Facilitating the meeting by asking the group questions about important issues rather than giving directions and answers will necessarily put you in a position of listening and interacting that will promote exchange.

And if you are a team manager, make it a practice to always speak last on the topics being discussed so as not to influence the conversation. See the impact!

Give us your feedback!  
Do you have other ways to make your meetings highly interactive and effective?

Be part of the conversation and send us your ideas to [info@o2coaching.ca](mailto:info@o2coaching.ca)

Have a great meeting!  
Be inspired and inspiring!