



# Cultivate Advisors®

**ENERGIZE YOUR ENTERPRISE  
WITH WORLD CLASS  
MEETINGS**

**CEO WEBINARS**



**Cultivate Advisors™**

# Why We're Here

**Purpose:** Discuss how to make meetings more effective and ensure you get an ROI on the time spent

## Outcomes:

1. One tip on how to plan a meeting
2. One tip on how to run a meeting

**ENERGIZE YOUR ENTERPRISE  
WITH WORLD CLASS MEETINGS**



Cultivate Advisors



## —. **What You Get**

- 1. Meeting Prep Tools**
- 2. Learn How to Take Control of a Meeting**
- 3. Ideas on How to Infuse Energy into the Meetings**

# Agenda

01

Intro to Effective Meetings

02

Plan a Meeting

03

Running a High Impact Meeting

04

Increasing Engagement in Meetings

05

Q/A, Round Table



Cultivate Advisors™



# Hello! I'm Colin Bowman

Operations Driver, Scaling Strategist,  
Business Advisor, Entrepreneur



Cultivate Advisors™



## About Me

1. Owned/operated trades franchise with 25+ employees.
2. Ran Franchisor division of 65 Franchise Owners and 350+ employees.
3. Advised dozens of small businesses across North America for the last 2 years - 2 clients thus far on Inc 500 list



Cultivate Advisors™



01

# Plan a Meeting

# SHARE THE COST IN THE CALENDAR INVITE



## PLANNING A MEETING



Cultivate Advisors™

# Things to Prepare

- Outcomes/Agenda
- Systemize your prep
  - *Data*
  - *Setup*
  - *Feeling*
- Systemize your participants' prep
  - *Their outcomes*
  - *Reflection*
  - *Deliverables*



Cultivate Advisors™



## PLANNING A MEETING

Don't Move Meetings

Do the First Round of Prep With Participants



# Example Meeting Prep

# Business Owners Prep For 1:1s

## WAM Prep Checklist

### Data Review

- Cashflow
- Profit/Contribution – per project
- Revenue
- Bookings
- Production/Production Schedule
- Hires – new applicants?

### Strategy/Event Prep

- Review this month's goal/gauge actuals vs. goal
  - o How am I doing vs. the monthly KPIs? What gaps need to be filled and what is the path to get there?
  - o Fill Out Appropriate Tabs
    - Weekly: Division Goals, Priority Management Tab, Cashflow, Production Plan, Update CRM (Leads/Estimates/Production),
    - Monthly: Org Chart, Financial Review (Cashflow – Type over last month's projections referencing last month's P+L – how did you do?)
- Review Direct Report's Prep
  - o Are they updating tracking systems – activity, financials, commissions, etc.?
  - o Is WAM tab well filled out? Are they giving core issues or surface explanations in their goal review?
  - o Is there scheduled well filled out for the upcoming week/does it include a plan that allows them to hit their goal with coverage?
  - o When was their last coaching event and how am I following up? Have they proven they are developing and implementing feedback?

### WAM Outline

- What are my goals within the overall business plan for the division/first cut goals for all my direct reports?
- Themes for the division this week – what are the big strategic initiatives I will be pushing in the majority of my GSRs?
- Proximal review/path recut if needed
- Financial health of the division reviewed

### Admin

- - What is the next big event coming up? Is it planned out?
- - Specific admin that week – high impact, must be succinct – email out in advance?
- - Check in on materials/are they fully stocked?

### Complete Individual WAM Prep

- What are the most important 2 tasks I need to lead each of my direct reports to, and what are the skill/commitment tactics I will be using to do this?
- Specific rapport topics decided in advance – don't default to just asking how their weekend was!

# Employee's Prep For 1:1s With Owner

WAM Prep File .XLSX

File Edit View Insert Format Data Tools Help Last edit was 22 minutes ago

M12 fx 1)

Name	Employee Name		
Date	2/15/2021	45	
End Date	12/31/2021	Weeks Left	
<b>WAM Prep File</b>			
GOAL REVIEW		Goal	Actual
Primary Goal			Why Hit or Miss?
Secondary Goal #1			
Secondary Goal #2			
<b>BUSINESS STATS</b>			
Outreach Last Week	Intro Meetings	Demos	Sales Generated
Last Week	Last Week	Last Week	Last Week
Overall	Overall	Overall	Overall
Top Drivers of the Business		Top Restrainers of the Business	
1		1	
2		2	
3		3	
GOAL FOR NEW WEEK		Goal	Keys to Hitting this?
Primary Goal			
Secondary Goal #1			
Secondary Goal #2			
<b>Core Development Needs you Feel you Need to Discuss</b>			
1)			
2)			
3)			
<b>Administrative/Quick Items or Questions?</b>			
1)			
2)			
3)			
4)			
5)			
<b>WAM PREP CHECKLIST: (only complete when done)</b>			
1)	WAM Prep/Schedule Tabs Complete (daily goals set)		
2)	Google Calendar Updated with schedule/plan for the week		
3)	Updating Actuals in Goal Spread Sheet/Lead Plan		
4)	CRM Updated		
5)	Prep done for upcoming meetings (research, pain points, core needs)		
6)	All prospects followed up with (meetings scheduled, proposals sent)		
7)			
<b>Proximal Goal Tracker</b>			
Proximal #1	Date	Actual	
Proximal #2	Date	Actual	
Proximal #3	Date	Actual	

+ WAM Prep Goal Spread Sheet

Cultivate Advisors™

# Leadership Conference

## Prep Email



Colin Bowman <colin@cultivateadvisors.com>  
to me ▾

8:34 AM (0 minutes ago)



### Leadership Team Meeting

Hope everyone had a great 4th and looking forward to getting the group together next week for our 2nd Leadership Conference of 2021!

The Purpose, Outcomes, and Agenda for this meeting can be viewed in this document below: [Leadership Team Meeting](#)



#### **The Preparation for this meeting is as follows:**

- Review your [Q2 Goals from this Attached Spreadsheet \(2nd Tab\)](#) - come ready to discuss how you did on your objective.
- On the first tab of the document, fill out the most important goal you have by the end of Q3, the most important problem you have to solve by the end of Q3, and any support you'll need from the group on these initiatives.
- Read the attached Carter Racing case study and come ready to justify your answer to the question: *Should they race?*

Other than that, simply bring your best energy and focus to help us collectively get the most out of our time together!

Best,



Colin Bowman | Partner, Business Advisor  
206.819.3796  
<https://www.linkedin.com/in/colinbbowman/>

Cultivate Advisors

Would you, or someone you know make a great Business Advisor?  
We're looking to add more talented advisors to our team. [Learn how to apply.](#)

# Leadership Conference Prep

## Participant Prep

Leadership Conference Prep Example

File Edit View Insert Format Data Tools Add-ons Help Last edit was sec...

A11 Colin

Name	What are you most excited about in regards to the future of the company?	What drains your energy in your current role?	What about the company is working well?	What about company is not working well?	What ideas or questions would you like to bring to the group?	What do you feel you bring to the leadership team?	What are your desired outcomes for leadership team meetings?	What expectations would you have of your fellow leadership team members to ensure the group works at its best?
Jon	Building a close knit family of leaders and workers- creating an environment where we all work towards a goal. This includes greater fiscal freedom and satisfying work.	Having people in the wrong seats for one person doing more work than they should - Loss of quality of life for team. This creates fires and work that normally would not be needed to be done taking up yet more of an individuals time.	Our core staff is really solid have them hear in the right place and are willing to do what it takes to move us forward.	'NOTE: this is still fresh but being worked on and fixed - Our core staff is really solid have them hear in the right place and are willing to do what it takes to move us forward.	What should our Operations org chart boxes look like? What functions and direct reports makes accountability/tracking makes for a 15 mil company with 1000 people with success into a 30 mil company. *NOTE boxes WITHOUT current people names being considered	Overall direction and Vision of the company. Wisdom which I got from past experience - which got from making mistakes :)	For the leaders to bond and all play a part in the decision making allowing for everyone to be onboard working towards and achieving our objectives, (regardless if they disagreed and were overlooked or overruled in the end). To help grow everyone in there personal leader journey to make them better leaders. To as a group solve the challenges we face currently allow all of us to make more money and have a happy life both inside the company and outside the company.	I would expect everyone to contribute and not sit back and agree just because its the trending thing to do. Ask a lot of clarifying questions and give fewer answers. To be present in the room and idea's but to bring a different point of view if needed. To be Present the whole time (not phones, emails, side conversations, etc.)
Jenn	Positive changes, process optimization, data centralization, improved field efficiencies, other markets exploration, independence of leaders capable of successfully run their departments, accountability	Unhealthy ratio working in the business vs on the business, incompetence clean up,	Culture, people, sales, Client relationships, effective executive Team, financial reporting, core values,	Skill trade recruiting, field tech performance, enough training and timely feedback,	How do we develop team better? Not enough accountability as we hold ourselves to exec level?	Creative outside the box ideas, flexibility, diversity, focus, strong push to get things done,	Everyone rolling in the same direction, everyone understands their piece in the larger picture	Contribute at the expected level, be open minded and honest
Max	The changes and structure we have put in place. I think this will leads to a stronger company with more dynamic members	working in two different time zones	sales, hiring, skilled crews	training and handoff of jobs	how can we make/train you to be a better leader	strong opinionated ideas that always has my team back	To empower our leaders that face all the day to day operations	to be open and honest
Jamelle	Continue to improve processes and seeing company growth and become more profitable	Waiting on TBD, vendor bills, etc Having to follow financials due to late items being added	I believe everyone at IBI has a strong desire to want to see company improve and grow.	Holding everyone accountable and making sure new team members don't get lost during the onboarding process	How do we build culture during COVID	Financial perspective and experience outside of IBI.	Everyone on the same page and working towards the same common goals. Get to know the team better	Everyone to be engaged and willing to participate in discussions.
Jeff	The quality of our customers and the passion to be successful	Role confusion	Networking and resources, recognition, building a strong SOP	Past training, no follow through	To have meeting in near future on set SOP (Chris is working on) system for accountability	Supportive, Trustworth, well rounded knowledge of construction industry. Willingness to do what it takes to make it work for everyone	Measurable goals and results, commitment, support. Self-improvement. Opportunity for greater responsibility beyond job description	Consistent communication, frequent updates on results, what is or isn't working

+ Meeting Prep Individual Leadership Initiatives Parking Explore



02

# Running a High Impact Meeting



# Basic Outline - 1:1s



# Basic Outline - Team Meetings



POAD

MEANINGFUL  
CHECK-IN

SHOUTOUTS

STATE OF THE STATE  
OR KEY UPDATES



TOPICS

- GROUP PROBLEM SOLVING IN PURSUIT OF DECISIONS
- RFI'S (REQUEST FOR INPUT)
- OTHERS

SUMMARIZE  
MEETING & ACTION  
PLAN

END WITH A  
CHARGE

# Basic Outline - Employee Review/Development Meetings

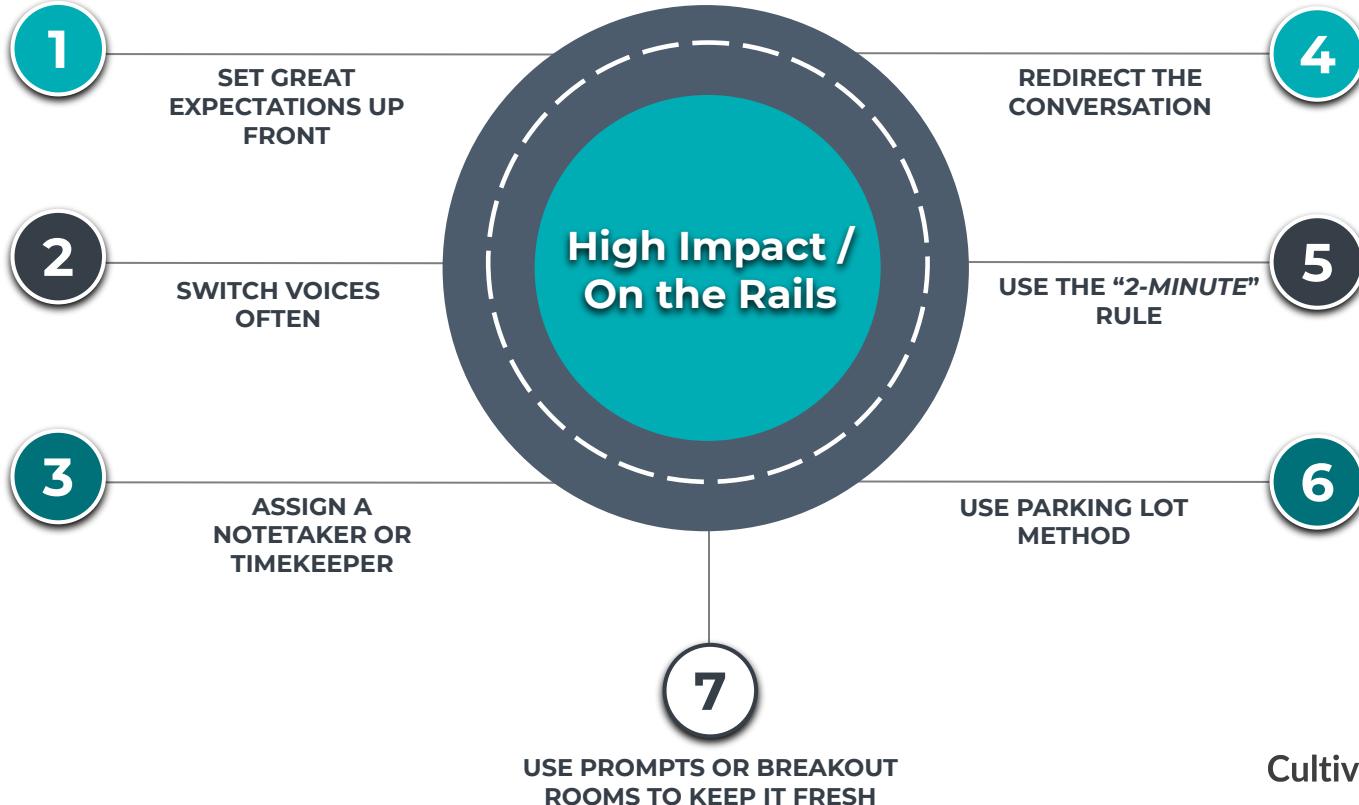
- 
- 1 POAD
  - 2 EXPECTATIONS
  - 3 REVIEW THEIR PREP & UNPACK IT WITH THEM
  - 4 CAREER GOALS
  - 5 BIGGEST DRIVERS & RESTRAINTS
  - 6 WORKING RELATIONSHIP WITH YOU
  - 7 ACTION PLAN & 90-DAY BENCHMARKS SET
  - 8 REVIEW MEETING
  - 9 END WITH SINCERE “THANK YOU”

# Basic Outline - Leadership Retreats

01	POAD	04	<b>BUILDING THE FUTURE OF THE COMPANY</b> (VISION, MACRO GOALS, KPI'S, INITIATIVES, INITIATIVE IMPLEMENTATION)
02	TEAM BUILDING CHECK-IN	05	<b>2-3 IMPORTANT DECISIONS MADE FOR NEXT YEAR</b> (CORE VALUES, TECHNOLOGY CHANGE, MACRO STRATEGY, ETC...)
03	STATE OF THE UNION	06	<b>DO SOMETHING FUN &amp; ENRICHING WITH THE TEAM</b> (33% BUSINESS & 66% FUN/RELATIONSHIPS)

\* This could be a multi-day thing!

# Ways To Keep It High Impact/On The Rails



03

## Increasing Engagement In Meetings

# Cool Random Things That Actually Work

- Do unorthodox check-ins
- Start with shoutouts
- In general, talk less, give the spotlight to your team
  - Best practices shared through them, not you
  - Assign roles/Keep to them
- Use compelling visuals/data interesting to the group
- Give tools/resources in the meeting
- Standing O
- Do unorthodox meeting wraps
- 5 Minutes of Silence
- How Hap Klopp ends Leadership Retreats

# Cool Random Things That Actually Work



Do  
Unorthodox  
Check-Ins

# Cool Random Things That Actually Work

**Start With  
Shoutouts**

# Cool Random Things That Actually Work

Talk Less &  
Spotlight  
Your Team

# Cool Random Things That Actually Work

Use  
Compelling  
Visuals & Data  
Interesting to  
the Group

# Cool Random Things That Actually Work

Give Tools & Resources in the Meeting

# Cool Random Things That Actually Work

Standing  
O

# Cool Random Things That Actually Work



Do  
**Unorthodox**  
Meeting  
Wraps

# Cool Random Things That Actually Work

5-Minutes  
of Silence

# Cool Random Things That Actually Work

How Happier  
Klopp Ends  
Leadership  
Retreats

# Cool Random Things That Actually Work

- Do unorthodox check-ins (examples)
- Start with shoutouts
- In general, talk less, give the spotlight to your team
  - Best practices shared through them, not you
  - Assign roles/Keep to them (help them prep if needed)
- Use compelling visuals/data interesting to the group
- Give tools/resources in the meeting
- Standing O
- Do unorthodox meeting wraps (end with a quote?)
- 5 Minutes of Silence
- How Hap Klopp ends Leadership Retreats

# Make Your People Better at Meetings



## Help Them

Help them build their structures  
& build them with them



## Observe Them

Observe them running  
meetings and coach them



## Duplicate Yourself

Duplicate yourself running your  
current meetings in 6-12 months

# Additional Reading

- *Meetings Suck* - Cameron Herold
- *Bad Meetings Happen to Good People* - Leigh Espy
- *Traction* - Gino Wickman
- *High Output Management* - Andy Grove
- *Death by Meeting* - Patrick Lencioni
- *The Art of Gathering* - Priya Parker

## MEETING PLANNING WORKSHEET

Use this worksheet to plan your next meeting.

Name of meeting:

Date:

Purpose:

Outcomes:

Participants:

### Meeting Type

- Performance       Data Transfer       Skill & Education
- Creative Collaboration       Decision Based

### Type of Decision

- Leadership Decision       Masses Decision       Unanimous Decision

### Participation Prep

List the items the participants need to complete prior to the meeting to ensure the time-lines and outcomes of the meeting will be hit.

### Emotional Tone

HOW IS THIS PERSON FEELING GOING INTO THE MEETING?	HOW COULD THIS AFFECT THE MEETING?
--	------------------------------------

Meeting Chair

Participants

### Proposed Agenda

TOPIC	PURPOSE OF THIS SECTION	TIME ALLOCATED	ACTUAL TIME

## TAKEAWAYS

Share two things you never want to forget in the chat!

- Planning a Meeting
  - Running a High Impact Meeting
  - Increasing Engagement
- Private Advisors™