Meetings (16 min)

For an organization to work well, three things must occur at every level of the organization.

1. Accountability
2. Coaching
3. Transparency

(I use these particular words only because they form an easy-to-remember acronym: ACT)

Accountability is declaring:

1. A destination (Vision, OKRs, KPIs)
2. The action steps to get there (Actions)
3. Whether or not those actions steps were taken (and eventually the goal achieved).

Coaching is declaring:

1. The current health of the entity (company, department, team, individual). Both the Good and the Not Good.
2. With the Not Good, describe in detail the Issue and declare a Proposed Solution. (This is where reports can make requests for help from their manager or their peers.)

Transparency is declaring:

1. Feedback to people on how they can improve. This step should be to a person's:
    a. Manager
    b. Peers
2. Reports
    a. (MM: need content)
3. Using ...
    a. This framework at first (relative feedback):
        i. Like.
            1. "These are the specific actions that I like that you are doing."
        ii. Wish That.
            1. "These are the specific actions that I wish that you would do differently."
4. Then adding this framework (absolute feedback):
    a. Rating 0-10 in your role.
        i. 8-10 is at or above expectation
        ii. 6-7 is below expectation and requires improvement through following the Wish That feedback above.
        iii. 0-5 is so far below expectation that you are now on a written Performance Improvement Plan.
5. To achieve a 10, you would …
    a.

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6. And then using this framework (Deep Feedback) every quarter.

This level of accountability, coaching, and transparency is best in both directions (from CEO to the company and the company to the CEO) at every level (company, department, team, and individual).

To achieve the best results, initiate a regular series of meetings:

1. One-on-One
2. Team
3. Company-wide (All Hands)
4. Office hours
5. Quarterly planning

Each manager should plan to devote an entire day each week to internal meetings. The weekly team meeting will be the longest (up to three hours initially, until teams learn the habit of writing down all input before the meeting when it can get down to 30 minutes). The weekly one-on-one sessions and office hours will consume the remainder of the day. This timing determines how many team members a single manager can effectively oversee. If one of your managers can't fit all the necessary meetings into a single day, she has too many people reporting directly to her, and you need to re-organize, or she needs to run more efficient meetings.

The overhead—twenty percent of the standard workweek—can feel tremendous to a startup CEO accustomed to the organic information flow of a small group working together in the same room. But without this one-day-per-week investment, a larger team will never fully know what to do, nor will the CEO get the needed feedback on her performance or the company's performance.

Calendar Cadence

Paul Graham of YCombinator, famously points out that makers (engineers) need long stretches of uninterrupted time to be productive, whereas managers are most effective when meeting. The compromise is to schedule days when no meetings are allowed. The schedule that works best for a five-day workweek is:

- 1 day of internal meetings

- 1 day of external meetings (i.e., interviewing candidates)

- 3 meeting-free days

It isn't critical when these days are, although it helps to space the two meeting days apart from each other.

The above schedule often comes under fire from recruiters, who worry that:

1. It won't be easy to conduct all onsite interviews on a single day.

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2. Many qualified candidates won't be able to make it in on the appointed day.

First, your hire and close rate for candidates should be very high (approx. 75%)— otherwise, you are losing incredible amounts of time by doing all-day in-person interviews with many candidates you don't want to hire or don't want to work for you. Therefore, unless you are already hitting the 75% metric, you should start screening candidates more effectively (i.e., brutally) in your phone interviews and lower the number of in-person interviews.

Second, it is true that some candidates can only come on specific days or times. However, the benefits of having meetings on only one set day, as measured by the company's increased productivity, far outweigh the cost of losing out on a few candidates. Additionally, if the candidate cannot find the time to make it on a set day within two or three weeks, it is likely that they won't take the job anyway.

There are many other high-level candidates out there, and you can find another one. But there are only a finite number of productive work hours within the company. Once lost, there is no way to recapture them.

There are two exceptions to the advice above:

1. In the very early days of a company, when a department has just one person, the department lead can set a recruiting schedule that works for her as she builds her team.
2. Departments that are entirely non-technical and don't require focused work time.

The guidelines above are for when a team is already in place, which requires uninterrupted days for its work. These steps are crucial for the Engineering team.

Meeting Order

When creating the schedule for the day of internal meetings, I recommend the following order:

- 1-on-1 meetings
- Leadership Team Meeting
- All Hands Meeting
- CEO Open Office Hour
- Company-wide social event

The 1-1 meetings are a time to ensure that each report is fully prepared for the team meeting. (As reports begin to prepare thoroughly for their 1-1 meeting in advance, their Accountability and Coaching can be pushed into the Team Meeting, allowing more time for Transparency during the 1-1).

At the Leadership Team meeting, all Issues are surfaced and either resolved or moved to a RAPID decision-making process. Then the Leadership Team can share all the decisions from the meeting at the All Hands meeting. The CEO Open Office Hour (which I highly recommend) can be scheduled anytime in the day. And finally, if you have a regular company social event

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(which I also recommend), the internal meeting day is a logical day to have it, as this is the day when most of your team will be in the office.

As the company grows, Department meetings (both 1-1s and Team) will likely have to happen on a different day. Just as the 1-1s are prep for the team meeting, the Department meetings are prep for the Leadership meetings. I, therefore, recommend scheduling Department meetings the day before the Leadership meetings.

Meeting Leads

It is essential that each meeting have a designated Meeting Lead, who is sometimes, but not necessarily, the group's manager. This person is responsible for making the meeting run well, which also means ensuring that all meeting participants submit their updates and issues in writing in advance and show up on time. The Meeting Lead must be ruthless about sticking to the timeline and, whenever something off-topic comes up, they should note it but schedule the discussion for another time. Finally, the lead must drive decisions and feedback to action items with DRIs and due dates and record these in the accountability system.

Without an effective Meeting Lead, meetings quickly become inefficient, and people come to resent them.

One-On-One Meetings

To understand the basis for these meetings, I recommend that all team members read the same book to get on the same page about the purpose and structure of these meetings.

If you manage high-level managers, the best book is Andy Grove's *High Output Management.*

If you manage individual contributors who are unlikely to read a long book like *High Output Management,* ask the team to read *The One Minute Manager* by Kenneth Blanchard and Spencer Johnson. It's a concise read (30 minutes), and it contains simple, practical advice. Assigning it uniformly to the team will ensure they have a common basis for proceeding.

The first One-On-One Meeting should occur soon after the onboarding process is complete. Have both the manager and the team member come to the meeting with written, measurable OKRs for the new team member. When the manager and team members reach a consensus on a set of OKRs (ideally three or fewer), merge these into one list.

Run subsequent meetings according to the following template.

Team member:

1. Accountability (goals and actions):
    a. Last Week
        i. For each of your stated actions from last week, did you get them done? Yes/No?
            1. If No, what blocked you?

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            2. What habit can you adopt so that you don't encounter that obstacle again?
    b. Next Week
        i. For each of your OKRs, what one action can you take to advance toward each of them?
2. Coaching (issues and solutions):
    a. Show your OKRs in traffic light fashion (green-yellow-red).
        i. Green= on-track.
        ii. Yellow= slightly off-track.
        iii. Red= far off-track.
    b. Show your KPIs in a traffic light fashion.
    c. Show any relevant pipelines (Recruiting, Sales, Customer Success, Engineering Roadmap, etc.)
    d. If I were to dig into these updates, what would I discover in your department that is:
        i. Good
        ii. Not Good
            1. Please describe the Issue in detail, as well as your Proposed Solution. This Proposed Solution should include:
                a. What you can do to help solve the Issue.
                b. What I (your manager) can do to help unblock you.
    e. Please list any other Issues you see in the company, with peers, with the product, in your own life, etc.
        i. For each, please list your Proposed Solution. Even if you are unsure of the right course of action, take a stab at a definitive roadmap. It will help advance the conversation.
3. Transparency (feedback):
    a. What did you like that I did as a manager?
    b. What do you wish that I would do differently as a manager?
        i. Would you please think of the feedback you are afraid to give me because you think it will hurt my feelings? Would you please give me that feedback?

Manager:

1. Transparency:
    a. Get feedback from your report.
        i. Elicit negative feedback about your actions. Do this any way you can. Ask for it, appreciate it, and act on it. These actions are the key to making a team member feel heard and valued.
        ii. Once you have gotten critical feedback, either
            1. Accept
                a. If you accept, co-create a written action step that you can take to act on it. Put this action step on your group task manager so that your report can see that you actually do it.
            2. Not Accept
2. In some rare cases, there will be feedback that you do not accept. That is okay, as long as you are clear about why you do not accept the request.

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    a. Give feedback to your report. Declare:
        i. Since the previous meeting, what actions did your report do that you liked? Be specific.
        ii. What actions do you wish that your report would do differently? State these as specific future actions. Example:
            1. "I wish that you would ask for feedback from your direct reports in your 1-1s."
    b. Update the team member's goals:
        i. Ensure that the OKRs are still relevant.
        ii. Ensure that their declared actions for the upcoming week are the straightest line to achieving their OKRs.
        iii. Ensure that their Proposed Solutions are the straightest line to solving the Issue.
3. Ensure that they have copied and pasted all of their actions (from OKRs and Issues/Solutions) into the group task manager.

Schedule these meetings regularly, on a fixed day and time. The weekly schedule can be bi-weekly or even monthly once a team member develops expertise at her tasks and if her goals remain consistent over time. Another alternative is to set different paces for Accountability, Coaching, and Transparencies. I.e., Meet weekly for Coaching and Transparency, but do Accountability on a bi-weekly or monthly cadence.

On your day set aside for meetings, schedule One-On-One sessions before the team meeting. Schedule them back-to-back, and allot twenty-five to fifty minutes for each one. If there is a serious issue to discuss, such as profound job dissatisfaction, then use your Open Office Hour (see below) later that day to fully address the issue.

If a team is small enough, you can merge One-On-One and Team Meetings, but be cautious about giving negative feedback in a group setting. Shame is likely to arise unless your team has agreed to radical transparency and actively wants negative public feedback. Most companies, therefore, opt to provide negative feedback only during One-On-One meetings.

That being said, I do recommend moving to a culture of radical transparency. Doing so will allow you to merge all One-On-One meetings into the Team meeting. This action can save you 4-6 hours on your day of internal meetings.

But radical transparency first requires explicit buy-in from every team member and training in how to do it effectively. Conscious Leadership Group runs excellent 1-day training in radical transparency. The investment of time may seem significant but usually pays for itself within a few weeks (i.e., saving a half-day per week).

Team Meeting

To support the company's quarterly goals, each team must meet weekly (or bi-weekly if the team is very smooth-running) to:

- Hold each other accountable for the actions they need to perform
- Surface and resolve any issues in the company

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- Give each other feedback

To ensure participants are prepared for the meeting, I recommend holding all 1-1s in the morning just before the team meeting. The 1-1s then serve as preparation for the team meeting.

During the team meeting, each attendee should:

1. Report whether they accomplished their declared Actions from the previous meeting. This response should be a simple YES or NO. If NO, they should also write WHY? they didn't do the action. And what HABIT can they adopt to make sure they never encounter that obstacle again? Here is an example:
    a. Get feedback from Joe.
        i. **NO.**
        ii. **Why? I forgot about it and therefore didn't ask for feedback when I met with Joe.**
        iii. **Habit? Create an Agenda list. Look at this list each time I meet with someone.**
2. Report their department updates
    a. Show
        i. Link to traffic-lighted KPIs
        ii. Link to traffic-lighted OKRs
    b. The written update should be a deep dive into these metrics to share what has happened that is
        i. Good
        ii. Not Good.
            1. What exactly is the Issue.
            2. What is your Proposed Solution for correcting the Issue?
3. Many people will say that they do not know what the solution is and want guidance. That is fine. But the discussion will be much more fruitful if they definitively declare what they THINK the solution is, even if they have very little confidence in their proposal.
4. Declare what actions they will do until the next meeting:
    a. Toward their OKRs
    b. As part of Proposed Solutions
5. Provide feedback to the team leader and peers in the *Like and Wish That* format.
    a. Peer to Peer
        i. Each peer gives feedback to one other peer per meeting (on a rotating basis)
    b. Reports to Manager
        i. If they did these in the 1-1, it is good to show them in the team meeting.
    c. Manager to Reports
        i. Only if the company is practicing radical transparency, otherwise this remains in the 1-1

The agenda for the meeting then becomes:

1. Updates from each team member (1, 2, and 3 from above)
2. Discuss Issues and Proposed Solutions.
    a. Time-box each Issue.

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        i. If the team agrees to a solution, turn it into Action Items with DRIs and Due Dates.
        ii. If the team does not agree to a Solution, turn the Issue into a RAPID.
3. Write and review Feedback to each other.

Team Meetings follow the same information flow as the 1-1s: Accountability, Coaching, and Transparency. In fact, as the team is effectively preparing in writing in advance for its meetings, the Accountability and Coaching portion of the 1-1s can be moved to the Team Meeting. This action is actually more effective and efficient, allowing more time during the 1-1s for Transparency.

It is essential to *time-box* all agenda items so that the meetings don't run on and all issues get addressed. You can complete this step by putting a number before each agenda item. You can indicate five minutes as [5]. At the end of the allotted time, move on. If there are still decisions to be made, create a RAPID.

It is critical that everyone submit all of their updates, issues, and feedback in writing before the meeting, as discussed in Chapter 8 ("Writing vs. Talking"). This step allows others to read the submissions, make comments, and ask questions before the meeting. This action massively increases information flow and allows for consensus before the team meeting even begins. When done verbally, team meetings that take 3 hours can take 30 minutes (and be more effective) when done in writing.

Open Office Hour

Each manager should set aside one hour each week for an open office hour, during which anyone can come to introduce an issue. This time ensures that all employees feel heard but limits the time required for the manager to a predictable level.

Company-Wide Meeting

On a cadence that varies between once a week and once a month, it is vital to have a Company-Wide Meeting where the results of the most recent leadership team meeting are shared. Follow the same format. Allow time, as always, for anyone to bring up their issues or provide feedback.

For another perspective, Peter Reinhardt of Segment.io shares: "We use all hands for sharing across teams of what teams are accomplishing, working on, celebrating wins (reinforce our values), and recognition broadly... plus bringing in customers to talk. I find this much healthier than an obsession with whatever leadership team is talking about (although we do present the board deck + board topics once per quarter)."

Quarterly Offsites

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Once a quarter, the leadership team (and eventually the entire company), which consists of all the department heads, should take a day or two to:

1. The Past. Do a retrospective on the prior quarter
    a. How did we do against our OKRs and KPIs?
2. How did we function as a team? (360 Feedback).
3. The Future. Plan for the future quarter
    a. Refresh Vision and Values
    b. Dig into Issues/Proposed Solutions
        i. Use the Emotions exercise shared in Issue Identification in Chapter 14.
    c. Set the new company OKRs (which then will cascade to Departments, Teams, and Individuals).
4. Refresh the company KPIs (which then will cascade to Departments, Teams, and Individuals).
5. Bond. Get to know and like each other as human beings.
    a. Structural activities
        i. If you really knew me ...
        ii. Peer Feedback
            1. Use the feedback exercise shared in Conflict Resolution in Chapter 14.
    b. Unstructured activities
        i. Drinks at the bar
        ii. Sports, crafts, activities, etc.
        iii. Events where spouses are invited.

I recommend scheduling these offsites on a Thursday/Friday so that you can then offer an optional weekend unstructured event with spouses. Team members often would like to get to know each other, but they are waiting for you to organize the events that will allow them to do so.

Vision

To create the ten-year vision, imagine it is ten years from now. You are the dominant company in the industry. Ask yourself:

- What industry do you dominate?
- Who is your customer (this should be a real live human being, not a corporate entity)
- What pain do they have that are you solving for them?
- What is unique about the solution that causes the customer to choose you over the competition?
- What asset (human or physical) do you control that makes it difficult for any competitor to copy your solution? In other words, what is your moat?

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Values

There are many ways to create your company values. A simple one is to complete the following sentence: "The rest of you in the company can make all of the decisions from now on, as long as you …."

OKRs

For your quarterly goals, or OKRs (Objectives and Key Results), the target is 3 and 3. Three Objectives with three Key Results for each Objective. Create these OKRs for the company, then for each department (based on the company OKRs), then for each team (based on the department OKRs), then for each individual (based on the team OKRs).

The Objective answers the question: "Where do we want to go?". Key Results answer the question: "How do we know that we're getting there?"

Here are examples:

> Objective- Reach $500,000 MRR (Monthly Recurring Revenue)
>
> Key Results-
>
> - Hire 10 additional SDRs.
> - Hire 5 additional Customer Success agents.
> - Hire Sales Ops person to project manage the sales team.

Finally, use your Quarterly Goals Meeting to establish near-term actions. Ask yourself:

"What actions can we take this week to stay on track for each quarterly OKR?"

Assign each Action to one person. At your next weekly meeting, the first thing you will do is ask everyone to declare if they completed their assigned Action.

Create an OKR tracking system. Either use a third-party tool (15Five, Betterworks) or create a traffic-lighted (Green, Yellow, Red) Sheet. The system should show, week-by-week, which OKRs are on track (Green), slightly off-track (Yellow), and far off-track (Red). Here is an example.

For all OKRs that are far off-track, the DRI must create a written Issue/Solution to get back on track.

Leadership vs. Team Leads Meeting

As the company grows, each Team will become a large entity (i.e., Biz Ops, Design, Communications, Compliance, etc.). An individual product may grow large enough to warrant becoming a business unit with its own GM. Thus there will be many VP-level execs. You will

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want to keep them informed and empowered. There will be a temptation to invite them to attend the Leadership Team meeting. Do not.

If someone needs to attend a meeting to be informed about what occurs or to have their voice fully represented, in that meeting, you have not yet created a transparent system.

Each meeting should have clear notes of all updates and decisions made (other than those around compensation and individual performance improvement). The team should publish those notes to the company. So, everyone can know what happened in a meeting without actually attending. In addition, each employee should be encouraged, weekly, to write up any Issues they see in the company, their department, etc., and write up their Proposed Solution as well. Then the team member should elevate these written Issues/Proposed Solutions to the right decision-making meeting with the employee represented in her own written words.

The meeting then becomes a way of making good and fast decisions.

Your Brain Trust should attend the Leadership Meeting. Who are the key minds that you need to hear from to make significant decisions? And which people run the central business units that you need to make sure are continually unblocked? These should be the attendees of the Leadership Team meeting. Do not add any other attendees to assuage their ego. They will just make the meeting less efficient.

For all the rest of your Department and Team Leads, there is a VPs (or Team Leads) Meeting. At this meeting, VPs announce recent decisions in the Leadership Meeting. There is then a "speak now or forever hold your peace" moment. If any of these decisions will have unintended consequences, now is the time for the VPS to raise their hand and say, "That is a terrible idea for these reasons …". The decision then gets kicked into a RAPID. But for the vast majority of decisions, the VPS will be okay with it, and then the decision gets published to the company, likely in All Hands.

To understand the scale of these meetings, I posit that the Leadership Team should be, and remain at, 6-8 people (up to 10 is okay). The VPs Meeting, by contrast, should grow as the company scales. At a company of 1,000 employees, the VPs Meeting often has 15-20 attendees. At Microsoft, this same meeting has over 150 attendees, or so I've been told.

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