

MEETING MATRIX

View the meeting options below and choose what works best for you and your team.

| Type | Purpose | Duration | Facilitator | Audience | Topics to Cover | Best Practices |
|--------------------------|---|--|-----------------------|----------------------------|---|--|
| Huddles | Quick sync on news, priorities, challenges and wins | 10-15 min Daily | Manager/ Team Lead | Immediate team | *Priorities: Productivity and workload *Barriers *Achievements *Announcement | *Use whiteboard *Be concise *Make it interactive *Focus on team-wide impact |
| One-on-One Meeting | Individual support, feedback, career development | 45-50 min *Weekly *Every other week if alternated with team meetings | Manager | Direct Report | *Metrics *Goal status *Development and growth *Challenges *Achievement/ Recognition | *Reschedule vs cancel *Focus on individual *Remove distractions *Listen, be positive *Ask questions with intent to support *Take notes / follow up |
| Team Meeting | Project updates, collaboration, decision-making | 50-80 min *Monthly *Every other week if alternated with one-on-one | Manager | Team Members | *Goals/metrics updates *Challenges *New team members *Achievements *Celebration | *Have clear agenda *Rotate facilitators or presenters *Track action items and assign owners during the meeting *Listen, be positive *Follow up |
| Leadership /Exec Meeting | Strategic alignment, cross-functional planning | 60 min Weekly | Senior Leader | Leadership /Exec Team | *Strategic updates and priorities *Achievements *Collaboration and decisions | *Assign a timekeeper and facilitator *Focus on decisions, not just updates *Listen to understand *Track outcomes and accountability |
| Town Hall | Share strategic updates, celebrate wins, address questions (Tailor to business unit, region) | 50-80 min Monthly or quarterly | Senior Leader | Business Unit Team Members | *Company performance & milestones (goals, projects, financials) *Focus for next quarter (initiatives, call for action) *Achievements *Q&A/Next Steps | *Pre-collect and prioritize questions *Allow time for questions *Include multiple speakers and SMEs *Listen to understand *Assign note taker *Follow up with a recap and action items |

Ad-Hoc Meetings

| Type | Purpose | Duration | Facilitator | Audience | Topics to Cover | Best Practices |
|---|--|-----------------------------------|--------------------------|----------------------------------|---|---|
| Project updates | Weekly | 15-20 min When needed | Project Lead | Project team Key Stakeholders | *State of projects *Achievement *Challenges/risks *Next steps or escalation items | *Use a consistent template (Green/Yellow/Red) *Be honest about risks *Listen to understand |
| Quarterly Business Reviews (QBRs) | Review performance, risks, and key initiatives | 60 min quarterly | Customer Success Manager | Customer | *Review KPIs vs. targets *Reflect on wins and misses *Set next quarter priorities *Risks and opportunities | *Standardize the format *Include customer or market insights not just numbers *Highlight learnings and achievements *Listen to understand |
| Strategic Planning Sessions | Align on long-term objectives and goals | ½ day Quarterly or Bi-annually | Facilitator | Leaders | *Long-term goal alignment *Strategic Priorities *Resources and support needed | *Come with prep work done (e.g., data, pre-reads) *Define "what success looks like" for each initiative *Balance bold thinking with operational reality |
| Round Table/ Listening Session / Focus Groups | When needed | 50-80 min When needed | HR/ Facilitator | Front Line Team Members | *Intent/objective *Share data *Ask clarifying questions *Brainstorm | *Stick to the agenda *Listen to understand *Assign note taker *Follow up/close the loop |
| Skip Level Interview | Build trust and visibility between leadership layers | 20-30 min Monthly or quarterly | Skip Level Leader | Staff two levels below leader | *Ask for feedback *Engagement pulse *Ideas for improvement | *Ask clarifying questions *Listen to understand *Follow up on themes |
| Stay Interview | When needed | 20-30 min When needed | Manager | Team Members | *Intent/objective *Ask clarifying questions | *Listen to understand |
| Offsites / Team Retreats | Deepen relationships and alignment | 1 day Bi-annually or annually | Facilitator | Teams | *Icebreaker *Purpose *Activities *Development | *Make it engaging and fun *Review and prioritize goals *Include development *Follow-up |



BEST PRACTICES

View the below

Preparation:

- **Define a clear purpose:** Meeting is necessary to decide, align, inform, brainstorm, or unblock?
- **Send an agenda in advance:** Include the objective, topics, time allocation, and owner for each item.
- **Invite the right people:** Decision-makers or contributors. Send meeting notes to anyone who needs to be informed later. Fewer people = more focus and accountability
- **Set expectations:** Clarify roles (e.g., facilitator, note-taker, timekeeper). Share pre-reads or context ahead of time.
- **Schedule 20, 50, 80 minutes** to enable participants to have a short break between meetings.

During the Meeting:

- **In-person** or virtually with camera on.
- **Start and End on Time:** Respect people's time — don't reward late arrivals or punish punctuality.
- **Stick to the Agenda:** Use a parking lot for off-topic items. Keep discussions tight and goal-oriented.
- **Use the "1/3 Rule":** One-third of the meeting to align, one-third to discuss, one-third to decide.
- **Encourage Participation:** Ask quiet voices for input. Use facilitation tools (e.g., round-robins, polls).
- **Use Mindful Communication:** positive mindset, listen to understand, ask clarifying questions.
- **Use Visual Aids Sparingly:** Use charts, decks, or whiteboards to support clarity, not distract.
- **Assign Action Items Live:** Be clear on what's next: who owns what, and by when.

Follow-Up:

- **Send Follow-Up Notes:** Include key decisions, action items, deadlines, and owners.
- **Track Accountability:** Revisit action items in the next meeting or via follow-up. Keep momentum going between meetings.
- **Ask for Feedback:** 'Was this meeting useful?' or 'What could we do to improve future meetings?'