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# The Anatomy of a Meeting

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## How the World's Best Companies Run Productive Team Meetings

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Foreword by Cameron Herold, author of *Meetings Suck*

# Foreword

**Cameron Herold**

Author of Meetings Suck

We'd never send our kids off to little league without teaching them the basics, like throwing and catching a ball, and how to at least swing the bat. Why then, do companies send their employees into meetings – to attend them, to plan them, or to run them, without some training on how to run killer meetings?

There is a good chance you've walked out of a meeting —or many— thinking "this was a waste of time." Lots of negative opinions regarding meetings tend to be about them being boring, uninspired, or simply just required events in the company but not at all useful. We're here to tell you that meetings don't have to be that way.

Are team meetings really necessary? The short answer: yes. Many people believe that with our modern methods of communication, we no longer need video conferencing or in-person meetings. Sure, you could replace team meetings entirely with emails and nonverbal communication, but that would be a big mistake, disastrous even for the success of your business.

Something happens during face-to-face communication that is critical to the future success of our teams and businesses. Meetings allow us to hear from people who aren't always heard; they enable us to quickly solve problems and to build trust within our teams.

Something happens to the connection among the team when you see one another across a table or over video. You hear the inflection and tone in someone's voice. You see other's facial expressions and body language. All of this helps to form deeper bonds of collaboration.

Done right, team meetings can drive your company forward; you just have to know how to make them productive.

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## How the World's Best Companies Run Productive Team Meetings

Chapter 1

# The 3 crucial benefits of a well-run team meeting.

Think of all the bad meetings you have attended: Meetings where one person dominated the conversation, the room argued in circles, and the content shared was repetitive – and could have easily been an email.

No wonder why meetings get such a bad reputation.

The truth is, running an effective team meeting isn't rocket science, but in order to do it right, you must understand why these meetings are necessary. Without knowing the **why**, it can be hard to get the **how** right.

So, what are the benefits of running a weekly or biweekly team meeting? According to Lara Hogan - author of *Resilient Management* - team meetings are one of the most effective tools to understand your team's morale, make decisions, and strengthen relationships.

> *"Meetings are there for you to both push information (share news, changes, key messages) and pull information (gather feedback, check the team's temperature, and hear fears and rumors that haven't made it to you otherwise), especially when that information requires additional context," says Lara Hogan.*

Here are three reasons why great managers have recurring team meetings...

## 1.1 Ensure that the team is aligned

Well-structured, efficient team meetings help you ensure that all team members understand their role and the priorities they should be focusing on.

In an article titled *Reaching Peak Meeting Efficiency*, Steven Sinofsky - a partner at the venture capital firm Andreessen Horowitz - argues that "talking, listening, and discussing" are the key ingredients for a shared understanding of the values that guide the micro-decisions that your teammates make every day.

> *"The most important thing in growing a company or team is to, of course focus on getting things done," says Steven Sinofsky. "There is no doubt that a group of people not meeting will get a lot of stuff done. It can be said with equal confidence, however, that by not meeting the stuff that will get done will lack cohesiveness, quality, and a shared set of values — the wrong stuff."*

Rather than being productivity killers or time-sucks (as a lot of people frame them), weekly team meetings can help improve productivity and communication. As Kim Scott argues in the book *Radical Candor*, an effective staff meeting has three goals:

> *"It reviews how things have gone the previous week, allows people to share important updates, and forces the team to clarify the most important decisions and debates for the coming week."*

Your teammates make a lot of decisions every day. Reviewing key metrics and agreeing on next steps at your team meetings will help you ensure that everyone is working on impactful priorities.

## 1.2 Strengthen relationships and team cohesion

In the book *High Output Management*, Andy Grove uses Maslow's Hierarchy of Needs (physiological, safety, social, recognition, and self-actualization) to explain the importance of team collaboration.

*"The social needs stem from the inherent desire of human beings to belong to some group or other," says Andy Grove. "But people don't want to belong to just any group; they need to belong to one whose members possess something in common with themselves."*

Hosting regular team meetings (especially if your team is working remotely) will help you create a culture of shared values and open communication. These meetings should be a safe space for team members to get to know each other and develop a sense of belonging.

*"Staff meetings are where a group of peers get to know each other, and where the presence of a common supervisor helps peer interaction to develop," says Andy Grove.*

## 1.3 Share sensitive information and feedback

Even though some updates can be shared via email or asynchronous communication tools, sharing important information at a team meeting gives employees the opportunity to express their opinions and ask follow-up questions.

*"Sensitive, difficult, or surprise information—like the context for a big roadmap upheaval, a staffing change, or anything else that involves managing emotions...*

*...is best communicated in person first (and followed up with an email)," says Lara Hogan. "This way, you can pivot your message based on the questions or reactions in the room, and you can add extra color with your words, your body language, and your tone of voice."*

As a team lead, there will be times when you'll have to communicate a potentially controversial policy change or company decision.

Sharing sensitive information and big news in person is a great way to gauge morale and understand your teammate's perspectives. As Andy Grove says in *High Output Management*:

*"Staff meetings create opportunities for the supervisor to learn from the exchange and confrontation that often develops. In my own case, I get a much better understanding of an issue with which I am not familiar by listening to two people with opposing views discuss it than I do by listening to one side only."*

Now that you know the three crucial benefits of a well-run team meeting, let's talk about the best practices that will help you boost productivity before, during, and after every meeting.

Chapter 2

# The magic before the meeting.

## 2.1 Why crafting a meeting agenda can be a game-changer for your team

You can't have an effective team meeting unless all the attendees are prepared to contribute to the conversation. That's why the first place to start is to create a meeting agenda where everyone adds talking points ahead of time.

Start by creating a shared meeting agenda that is visible and editable by everyone on the team. This will give all attendees an equal chance to prepare materials in advance and write questions to ask during the meeting.

*"Sending out an agenda ahead of time shows a level of care and intentionality in helping the group stay focused," says Julie Zhuo, author of The Making of a Manager. "It's a good idea to do this for meetings of any size, even 1:1s, but the larger the meeting, the more important the preparation."*

Keith Rabois, a General Partner at Founders Fund and the former COO of Square, shares a similar argument in the essay *How to be an Effective Executive*. He argues that spending time preparing for large meetings is one of the most important things you can do as a leader, since those meetings can impact how everyone on your team makes decisions:

*"When you have many people affected by one thing, spending a lot of time to perfect it is high leverage," says Keith Rabois. "Agendas across all meetings should be set and sent ahead of time."*

Collaborating on a meeting agenda won't just make all your meetings more productive. It will also be the first step towards building a more inclusive company culture, where everyone's ideas and contributions are valued.

***Pro Tip***

*Use a collaborative meeting agenda tool to encourage preparation and bring all voices into the conversation.*

## 2.2 10 talking points that will inspire productivity and collaboration

Weekly team meetings are the ideal opportunity to celebrate wins, gather feedback, and check-in on your team's mood. However, these meetings can go completely off-track if you're not using the right meeting agenda template.

Here are 10 agenda items you can use to ensure that every team meeting is a productive work session your team will want to attend:

1. Icebreakers
2. Updates
3. Lightning talks
4. Metrics
5. Highlights
6. Feedback
7. Priorities
8. Roadblocks
9. Shoutouts
10. Recap

## 1. Icebreakers

Research shows that getting your team's creative juices flowing before your meeting is a great way to strengthen coworker bonds, stimulate better brainstorming, and create an atmosphere of inclusivity.

Vanessa Van Edwards, a behavioural investigator at Science of People, argues that adding an icebreaker to your meeting agenda can truly make a difference:

> *"When thinking about having a successful meeting, we often think about the basics, such as a strong agenda, a yummy lunch, and planning. These are all good strategies, but don't forget about the professional warm-up. A good icebreaker can break the tension, break the awkwardness and, of course, break the ice," says Vanessa Van Edwards.*

Here are a few icebreaker ideas you can use to kick off your next team meeting:

- Ask people to talk about their favourite hobby, podcast, or TV show.
- Share your weekend plans or something you're looking forward to.
- Play a team building game such as "two truths, one lie".

## 2. Updates

This is the space for company announcements and industry trends that everyone on the team should be aware of. While it is true that this section of the meeting shouldn't take longer than 5-10 minutes, it's important to include it in your weekly team meeting agenda.

Why is it important to share updates during your team meetings? Experts such as David Burkus, author of *Under New Management*, argue that there's a lot that happens in a meeting that can't be replaced with an email or digital memo.

*“A long-standing maxim on communication has it that only 7 percent of information communicated in person is verbal – the actual words that could be conveyed in an email. The remaining 93 percent are contextual elements like non-verbal cues, tone of voice, context, and feedback,” says David Burkus.*

## 3. Lightning talks

A lot of teams use a section of their weekly team meetings to show and tell their work. Some teams call these short presentations ‘demos’ or ‘lightning talks’.

According to Ville Hellman, director at FxNDev, lightning talks have a lot of great benefits. They can help your team:

- Break down knowledge barriers.
- Showcase and get recognized for their work.
- Practice communication and public speaking skills.
- Share recent ideas with the team.

*“Sharing knowledge creates a culture that celebrates those who make the extra effort to gain an understanding of something and encourages others to do so,” says Ville Hellman. “It helps highlight talents, ideas and passions and provides an opportunity for the speaker to gain a deeper understanding of the material by considering how to present it to others.”*

## 4. Metrics

One of the most important benefits of team meetings is that they help you ensure that the team is aligned. That’s why you should use this time to review key metrics, dashboards, and the team’s progress on their overall goals.

According to Steven Sinofsky, every high-performing team needs goals, and those goals should be concrete, actionable, and clearly communicated at your meetings:

> *"The engineering team has feature and quality goals. The marketing team has positioning, pricing, content goals. Sales has quotas. These goals define really what people are marching towards every day," says Steven Sinofsky. "When everyone has goals and they are shared there's never any confusion about why or what people are doing. Goals are the what of meetings."*

## 5. Highlights

Studies show that celebrating small wins can have an outsize impact on team motivation. That's why a section of your weekly team meeting should be dedicated to celebrating wins and milestones.

Having a highlights section will not only help you boost team morale and employee engagement but will also empower your teammates to share their positive news with the rest of the team. This is especially important since some people (notably women and members of minority groups) tend to keep wins and positive news to themselves.

Sally Helgesen and Marshall Goldsmith, authors of *How Women Rise*, explain the negative impact of not having a space to share highlights and wins:

> *"When the praise you hope for is not forthcoming, you might feel unappreciated and under-acknowledged. You may start to resent not only the higher-ups who seem unaware of all the hard work you do but also colleagues who are skilled at getting noticed."*

Adding a highlights section and encouraging your teammates to populate it with their wins will be a proactive way to avoid this common problem.

## 6. Feedback

The best way to foster a culture of continuous improvement is to show your teammates that everyone's feedback is welcome and valuable.

Start by encouraging your teammates to give you feedback about processes and situations that could be improved. Some feedback-related questions you can ask at your team meeting include:

- Are there any processes or tools that you're currently struggling with?
- How could we change our team meetings to be more effective?
- How can we improve our office space/work environment?
- What information could help our team perform better?
- What should we start/stop/continue doing as a team?

Finally, you can use this section of the team meeting to praise your teammates for their work. Remember that great managers **praise in public** (at team meetings) and **criticize in private** (during one-on-one meetings).

## 7. Priorities

One important part of meeting with your team on a recurring basis is setting clear priorities and expectations for the next sprint (or period of time before you meet again).

Sprint planning is an important part of your team meeting because it helps you discuss and decide what activities will have the highest impact and return on investment. These activities are sometimes called the sprint backlog: a list of tasks identified by the team to be completed during the week.

Here are four easy steps to create a list of priorities (or backlog items) with your team:

- Come up with a list of tasks that need to be completed this week.
- Estimate how long it will take to complete each task.
- Discuss which of those activities would have the highest impact or ROI.
- Create a list (sprint backlog) of the most important tasks and assign them to different individuals on the team.

## 8. Roadblocks

Once the planning section is done and you have assigned all the tasks, it’s important to ask the team if they see (or can predict) any factors that could prevent them from getting their work done.

One of your main responsibilities as a manager is to enable your team to be more productive and do their best work. Some questions you can ask to find out about those roadblocks include:

- Is there anything blocking you from getting your work done this week?
- Are there any general concerns about the priorities/tasks we just assigned?
- Does everyone feel comfortable with this week’s priorities?
- What’s something you’d change or would like to discuss?

## 9. Shoutouts

We live in a world where talent is more competitive and expensive than ever. And one of your missions as a team lead is to retain and recognize that talent. What’s the most effective way to recognize employees? Do it publicly, at your next team meeting. Here’s why:

Studies show that employees appreciate public recognition more than monetary awards and pay increases.

*“The best managers promote a recognition-rich environment, with praise coming from every direction and everyone aware of how others like to receive appreciation,” says a study by Gallup. “This type of employee feedback should be frequent – Gallup recommends every seven days – and timely to ensure that the employee knows the significance of the recent achievement and to reinforce company values.”*

Adding a shoutouts section in your team meeting agenda will help you motivate employees and build a culture where teammates recognize each other's work.

## 10. Recap

Last but not least, you should never end a meeting without a recap of the action items and takeaways. This is going to reinforce the importance and main discussion points of the meeting. It is also going to drive outcome-oriented results by reminding your team of their responsibilities so they can hold themselves and their colleagues accountable.

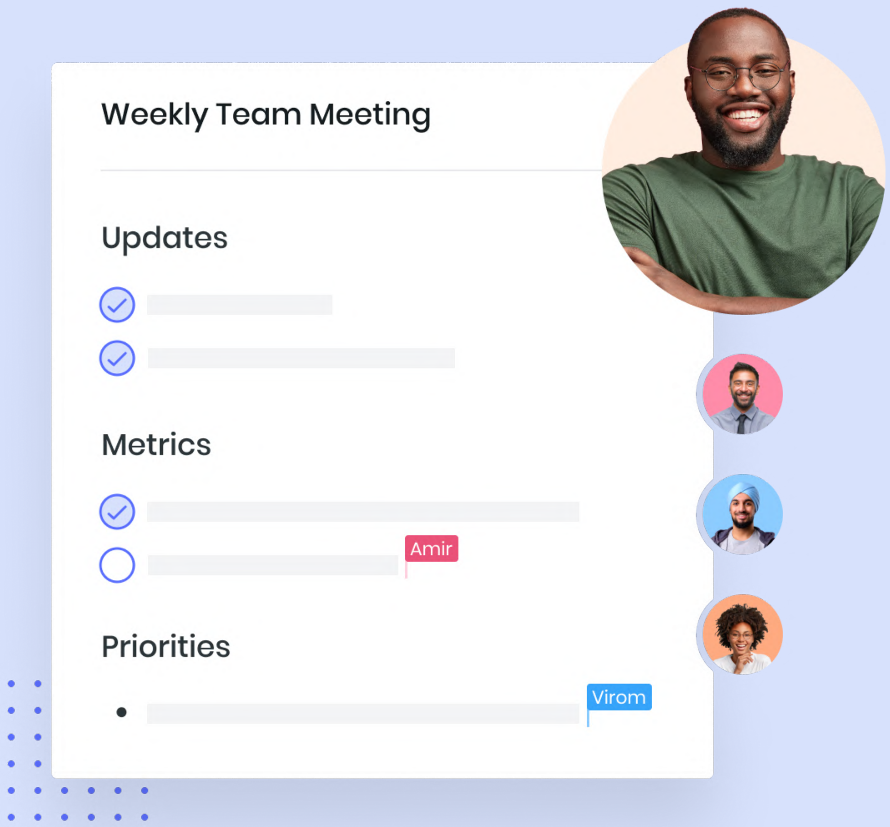
Here are some questions you can ask at the end of your team meeting:

- What are everyone’s key takeaways?
- What are the steps we’ll take after this meeting?
- What are the things we’ll accomplish from now until the next time we meet?

*“A single meeting is not an end unto itself; it is a stepping-stone in the much longer path of creating something valuable for the world,” says Julie Zhuo.*

Chapter 3

# How to lead an effective team meeting.




## 3.1 Bring all voices into the conversation

Team meetings can have a significant impact on team culture and morale. They are a forum where people come together to get to know the team, express ideas, and share feedback. However, research shows that women, minority groups, and quieter individuals are often uncomfortable speaking up and more likely to be interrupted.

How can you ensure that your team meetings are inclusive? One of the most important practices you can adopt is stepping in when there are one or two individuals dominating the conversation. Make it a habit to:

- Go around the room and ask the quieter team members for their opinion.
- Foster a welcoming environment by repeating that everyone's input matters and there are no 'stupid' ideas or questions.
- Ask people to write down their ideas and talking points in the meeting agenda before talking through each of them.

***Pro Tip***

*Be on the lookout for interruptions. If someone gets cut off, provide cover by saying: "Hang on, [name] wasn't finished."*

According to leadership experts Kathryn Heath and Brenda F. Wensil, the team leader should act as the conductor in an orchestra:

*“The role of the conductor in an orchestra is to manage the tempo of a performance. They listen critically to keep musicians playing in unison and actively control the dynamic to prevent one instrument from overpowering the rest,” say Heath and Wensil. “The same goes for leaders in meetings — you need to manage conduct and give everyone space to play their part.”*

## 3.2 Respect people's time

In *High Output Management*, Andy Grove says that wasting  people's time is the equivalent of stealing from your company. The comparison might sound a little harsh, but it’s a good way to explain that gathering your teammates represents a big cost – and should only be done if the meeting has a clear purpose:

*"Just as you would not permit a fellow employee to steal a piece of office equipment worth $2000, you shouldn’t let anyone walk away with the time of his fellow teammates,” says Grove.*

Creating a meeting agenda is the first step towards showing respect for your teammate’s time. It will help you stay focused on the meeting’s purpose and avoid digressions. The second step is emphasizing the importance of punctuality. If one person tends to be late for your team meetings, you can give them some feedback during a one-on-one meeting.

Last but not least, respecting people’s time involves acknowledging when a meeting should be cancelled or cut short.

Some reasons why you might want to finish early or cancel your team meeting include:

- Most of the team is out or on vacation.
- You checked off all the talking points in the meeting agenda.
- The team could use the time to work on an upcoming deadline.

For Wethos, a marketing agency in New York, team meetings are highly structured and respect employees' time:

*"Our weekly huddles and 1:1 meetings aren't just for chatter. They have clear agendas and clear takeaways. We don't schedule new meetings unless it's a last resort, and only when the other participants have agreed a meeting is the best course of action."*

In an article on helping remote teams thrive, Wethos goes on to add:

*"If folks feel like their days are becoming too heavy with meetings, we suggest that they block work time on their calendar to keep things balanced."*

## 3.3 Assign roles to keep employees engaged

How can you keep employees engaged during your team meetings? That's probably something you've wondered if you manage a team.

Here's a tip for you: assign and rotate the roles of facilitator, timekeeper, and notetaker between all the attendees. This will get everyone involved and invested in the success of the meeting.

- **Facilitator:** guides the discussion, making sure all sides of the issue are raised.
- **Notetaker:** captures key decisions and distributes notes after the meeting.
- **Timekeeper:** helps move the discussion along efficiently.

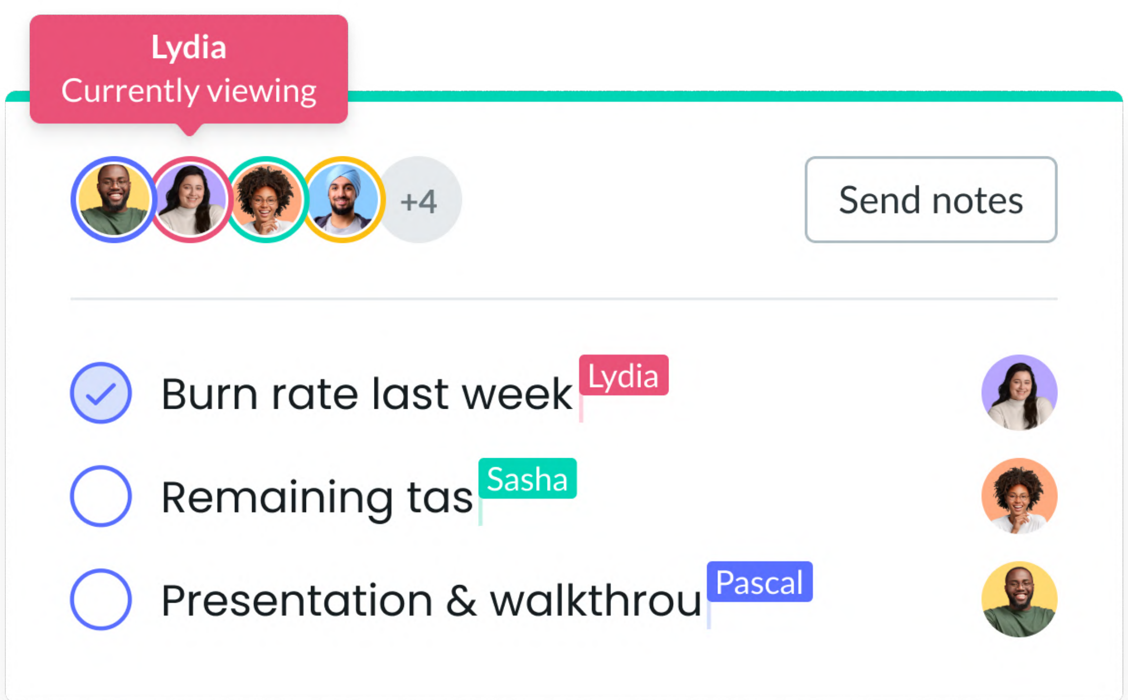
## 3.4 Take detailed meeting notes

A lot of people don't bother with taking notes during a team meeting, only to forget what was discussed only a short time afterwards.

Opting out of taking meeting notes is harmful to employee productivity because it makes it extremely difficult to recall important details. If employees can't recall these significant takeaways from meetings, they won't take action and therefore lack the ability to execute tasks that bring the team closer to achieving their goals.

**Pro Tip**

*Use a collaborative tool like [Fellow] to keep all your meeting notes in one place - and never forget what was discussed.*



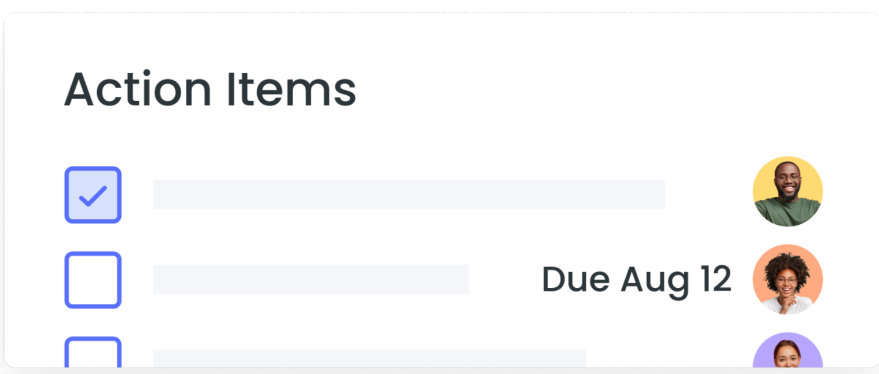
If you and your team choose to take meeting notes, you will notice that you will retain information much more clearly and feel more prepared to tackle your responsibilities.

Here are three steps to follow when taking notes at your next team meeting:

- Write **important discussions, questions, and decisions made** under each talking point on the meeting agenda. This is useful because when these questions arise while you are working on your everyday tasks, you can refer back to your notes without having to reach out and ask the same questions to the appropriate individual.

- Include a section for talking points and ideas that should be discussed at future meetings. This is often called the **meeting parking lot**. Essentially, the parking lot technique is used to write down any talking points at the bottom of the agenda that you'd like to bring up later, instead of interrupting others as the meeting evolves.

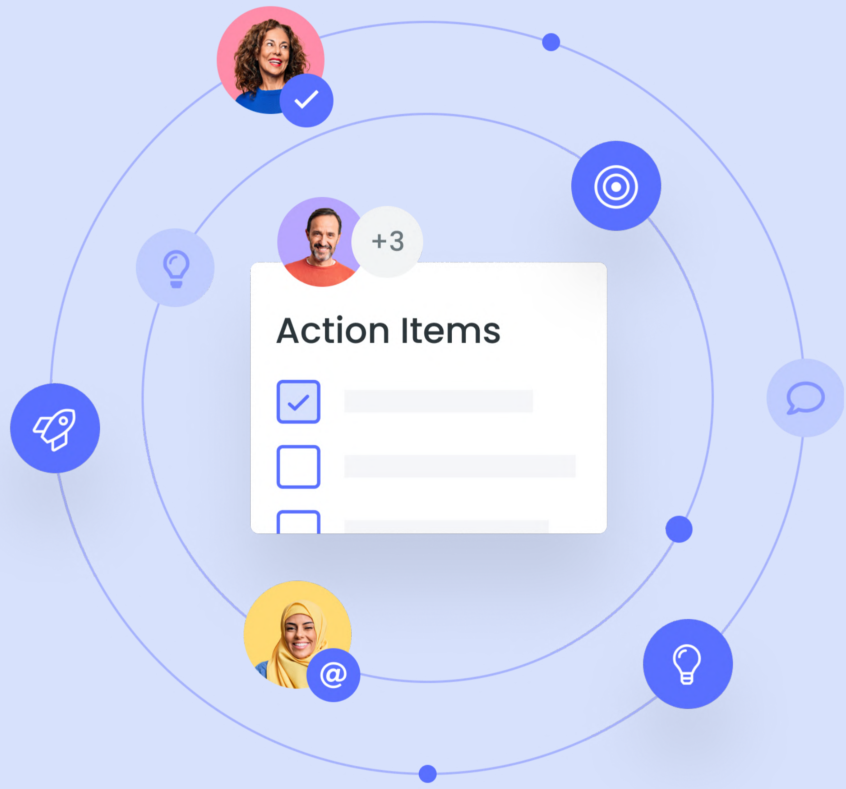
- Whenever an action item is proposed during the meeting, **document the context and who it's assigned to**, as well as the due date. Often, we only write down action items that are assigned to us and in doing so, we lose the greater context and we lose sight of the larger, overarching goals that we are working with our teammates to achieve.




We hope these best practices inspire you to build great meeting habits. Now, let's talk about what you can do to keep the momentum going after every meeting.

Chapter 4

# 3 Easy steps to keep the momentum going after your meeting is over.




## 4.1 Send a meeting recap or follow-up email

In the book *Resilient Management*, Lara Hogan argues that sending out a recap email after each meeting is a great way to reinforce decisions, clarify company messages, and address your teammates' questions:

> *"I love the practice of repeating decisions or actions after a meeting with a recap email," says Lara Hogan. "This communication method harnesses all of email's power for good: it helps set the record straight, disseminates information to lots of people at once, and opens up conversation internally, while reflecting on the themes that have come up for you in weekly 1:1s, backchannels, team meetings, etc."*

Sending an email with the notes and agreed action items from your meeting will be a good reminder of the things that were discussed and the takeaways that the team agreed on.

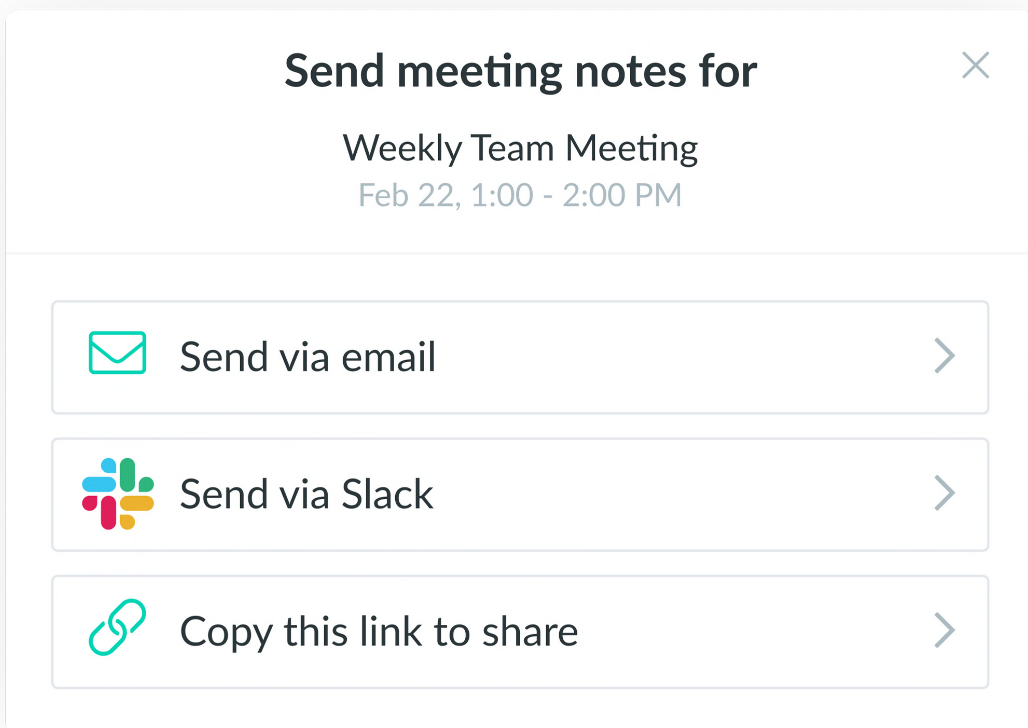
If you want to take this practice even further, you can write a personal message to accompany those notes. This is especially important after meetings where you made an important announcement, talked about a controversial decision, or felt that the team morale was low.

As Andy Grove, author of *High Output Management argues*, sending your meeting notes is the final step to having productive conversations.

*"All this may seem like too much trouble, but if the meeting was worth calling in the first place, the work needed to produce the minutes is a small additional investment (an activity with high leverage) to ensure that the full benefit is obtained from what was done."*

***Pro Tip***

*Use Fellow's **send notes** feature to send a recap message in a matter of seconds.*



## 4.2 Ask team members for feedback about the meeting

When was the last time you asked employees for feedback about your team meetings?

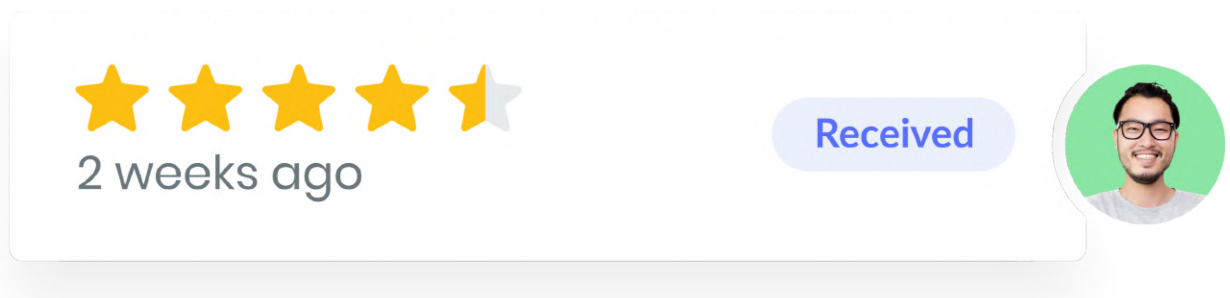
In *The Making of a Manager*, Julie Zhuo describes a time when one of her reports let her know that their weekly stand-up meeting could easily be an email:

> *"Gutsy move, telling your manager that her meeting sucks," says Julie Zhuo. "But the feedback was spot-on. I left with a deeper appreciation of both the importance of planning good meetings and the value of giving feedback to improve bad meetings."*

Some questions you can ask to improve your team meetings include:

- Should this meeting be shorter?
- How can we make this meeting more effective?
- What's your favourite part about this meeting?
- What is your least favourite part of this meeting?
- Should we keep running this meeting?
- What do you think went well/could be better?

Giving employees the opportunity to [share feedback about meetings and projects] will help you develop a culture of experimentation, innovation, and continuous improvement.



## 4.3 Carry forward incomplete action items

Action items are arguably the most important components of your team meeting. They're an essential part of making sure that your meetings involve new discussions, ideas, and decisions – and aren't just scheduled to exchange updates.

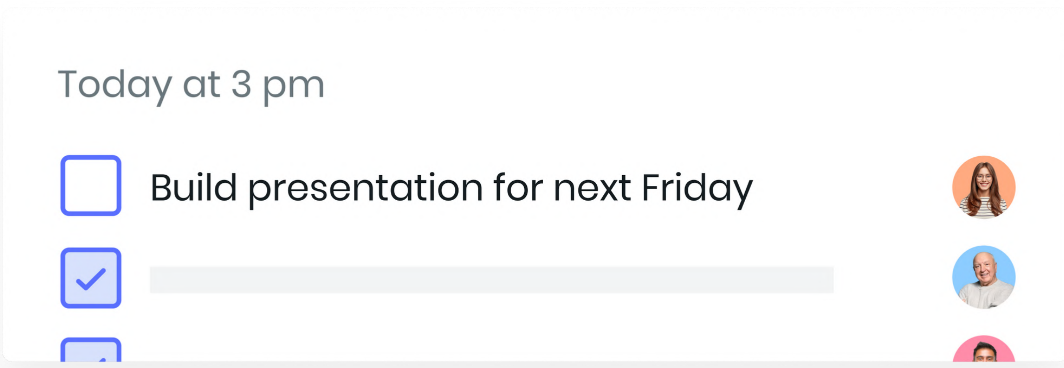
> *"After the meeting, the follow-ups need to be treated with as much care as the preparation," says Julie Zhuo.*

Once your team meeting is over, it's important to check on the progress of the tasks that were assigned. Check-in with your teammates throughout the week to understand if they need help completing their tasks and carry forward any incomplete action items to your next team meeting agenda.

**Pro Tip**

*Dedicate a section of your team meeting to follow up on the incomplete action items from your previous meeting.*

One of your main responsibilities as a leader is to keep your team's energy, morale, and motivation high. Following up on your meeting action items is a great way to boost accountability and ensure that there's progress between meetings.



Chapter 5

# Team meeting inspiration from high-performing teams around the world

## 5.1 Figma's weekly design team meeting

### by Noah Levin, Design Director, Figma


*The original post can be found here.*

Every Monday, we kick off the week together.

During these team meetings, we cover team-wide responsibilities. Whether that's revisiting our design principles, discussing how critiques are going, brainstorming how to up-level quality, or reviewing the previous quarter, we usually find ourselves answering more strategic questions. We also have more timely sessions — in a recent meeting, we talked about what we can do to better support other teams during the pandemic.

The topics are scheduled during the warm up, and if there's no agenda, we cancel the meeting. We end up canceling at least 1 per month, or replacing the time slot with a critique (if there was an overflow of topics).

It should not be the sole responsibility of the team lead to move all of this forward. Your team undoubtably has thoughtful, talented people who are well-positioned to help solve these problems. I believe the most productive and healthiest teams feel a shared responsibility to improve the team's activities.

Most of the best ideas we've had from the team did NOT come from me. It was Niko who originally suggested we revisit our hiring practices, Jenny who came up with better debrief templates with less bias, and Marcin and Shana who've started thinking more about our new hire onboarding practices.

Team meetings are a great time to have discussions about these type of improvements together.

**A word of caution:** Managing conversations with a large group can be challenging. As a facilitator, it's your responsibility to avoid groupthink and encourage everyone to have a voice.

Above all, think about how to guide the discussion in a way that feels safe. Consider time-boxing complex topics and hearing feedback "around the room" one at a time, so that those who feel less comfortable in group settings have a designated time to speak up. You can also run written exercises with sticky notes (either physically or digitally) and break out into smaller groups, which can feel more inviting for some.

## 5.2 Shopify's brainstorming meetings

by Courtney Symons, Lead Writer, Shopify


*The original post can be found [here](#).*

Your next big idea could be the one that makes your business take off. It could be a feature that changes the way your clients do business, or a service that makes their lives easier. Getting to that big idea, however, can be a struggle. And one person alone can only view a scenario from their singular perspective. That's why it's so important to borrow from the collective genius of your team, via brainstorming — and it's essential to develop an effective creative brainstorming process to get you there.

To ensure that you get optimal results from your brainstorming session, inform all attendees as early as possible so they can block the time off in their calendars. Consider passing along an agenda in advance so people will know how their time will be spent, and present them with the main question you'll be looking to solve so they can prepare some thoughts in advance and hit the ground running.

Once everyone arrives in the room, here's what the meeting should look like:

- **Break the ice:** Arguably the most important element of your brainstorming process should include making sure everyone is comfortable sharing their thoughts.

- **Establish rules of engagement:** This should be determined as a group, and should outline how everyone agrees to behave.

- **Start with a solo brainstorm:** Each individual writes down all of their ideas. This concept has been called "brainwriting," and studies have shown that this particular brainstorming process generates 20 percent more ideas and 42 percent more original ideas compared with traditional brainstorming groups.

- **Run a "How might we…" exercise:** Ask people to come up with the questions that will determine the focus of the actual brainstorm session. If you employ this technique, the facilitator can instruct everyone to vote on which of the questions they think are the most essential to answer during the brainstorming session.

- **Start thinking about taking action.** After all of your questions and ideas are up on the wall, and everyone has placed their votes via stickers, it's time to ask questions such as: What is our deadline? Who will own this?

As important as an effective brainstorming process is for drawing out unique ideas, the really important part comes from the follow-through.

Designate a cadence to check in on each of your action items' champions and don't forget to send out a survey following the brainstorm to collect feedback on the session.

What did people like? What didn't people like? What could have been improved? Be open to these insights, as they will help shape and improve your brainstorming process in the future.

## Shopify's post-mortem meetings

by Simon Heaton, Customer Acquisition Lead


*The original post can be found here.*

The end of a project is a wonderful time. You've sent over the final deliverable and are beginning to think about the next big job you're going to tackle. However, before you and your team sit back and enjoy a round of celebratory drinks, there is still one final piece of work that remains: the post-mortem meeting.

Post-mortems, which are also referred to as debriefs or retrospectives, are an integral part in the lifecycle of any given project. When used effectively, they can help uncover insights that allow your team to improve internal processes, streamline workflows, and find ways to increase overall client satisfaction on future projects.

Just like any other meeting, you should prepare an agenda for your post-mortem to ensure your discussion doesn't get sidetracked. Teams sometimes avoid including agendas in their post-mortems, because they overthink the level effort and time needed to create them. But the reality is that even if your agenda is really simple, the impact it can have on the efficiency of your meeting will be well worth the upfront preparation.

## 1. Use this post-mortem meeting agenda

- **Recap of the project:** A brief synopsis of the initial expectations and deliverables of our project. This sets the groundwork for what we can measure success and failure against.

- **Recap of the outcome:** Identify what went well and differently from the anticipated workflow.

- **Stakeholder input:** Team members have the floor to share their perspective on why things went the way they did.

## 2. Prepare by circulating a questionnaire

When sending your agenda to participants, you should also include a pre-meeting questionnaire for everyone to complete before coming to the post-mortem. This helps ensure that everyone comes to the meeting prepared with key takeaways from the project, and the majority of your meeting can be spent discussing those points, rather than trying to identify of them. Rather than just getting attendees to identify the 'good' and the 'bad' of your project, your questionnaire should prompt them to think about those aspects in relation to specific processes of your workflow.

## 3. Transform meeting insights into action

This is the single most important piece of advice I'd offer anyone looking to improve the effectiveness of their post-mortems. Too often teams put the effort into hosting these meetings, only to never act upon the insight and feedback that was shared. This lack of action entirely defeats the purpose of hosting a post-mortem in the first place, which we've seen is to identify project outcomes with the goal of improving project workflow.

## 5.3 How Close runs remote team meetings
### by Steli Efti, CEO at Close


*The original post can be found here.*

Every Monday, each team lead sends out a report that includes that week's goals and metrics. We all read each report, make comments, ask questions, and prepare for the team meeting. On Tuesday mornings, we have a company-wide video call, where we typically have follow-up discussions based on Monday's reports. These calls are scheduled for 30 minutes, but most only last 15–20 minutes. We also make sure to record these meetings, so that anyone can review what we discussed.

After that 30-minute call, we have cross-functional one-on-one sessions. We pair people for 15-minute chats about work and/or life. Sometimes they'll discuss specific projects they're working on, but many times, they talk about their weekends or their dogs. Whatever it is, they're able to connect and learn more about each other.

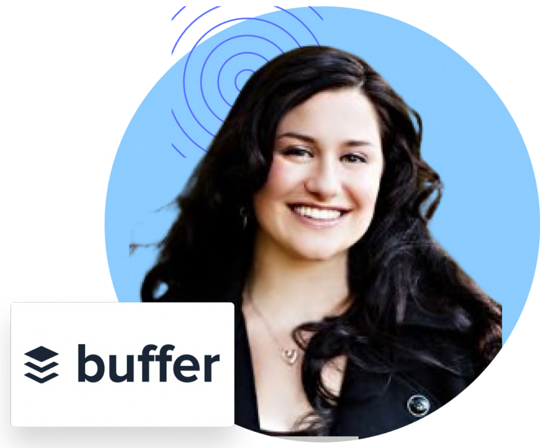
Once a month, each team sends a monthly report which summarizes week-to-week results, and lays out the plans for the coming month. And we send out a financial update to everyone in the company, so they know how we're doing.

We also share one question with the team every week, like "How productive do you feel?" or "What's the last inspiring thing you've read?" People send in their responses, and we send out the results every Friday. It's a great way to engage with your team at the end of a long work week.

Finally, any time we hire someone new, we ask them to fill out a *Guide To You*, which is a quick survey about their work and communication preferences. These surveys are shared company-wide, and we can reference them later, whenever we need a refresher.

## 5.4 Buffer's remote all-hands meetings

### by Nicole Miller, People Ops Manager, Buffer




*The original post can be found here.*

At Buffer, we refuse to accept that our monthly All Hands meetings have to be typical. Each time we meet, we try to add in a new element or experiment to keep things fun, fresh, and surprising.

Here are a few of the things that have worked (and a few that haven't!) for us when it comes to the All Hands meeting:

- **Icebreaker question while we're gathering:** We share a light and fun icebreaker question ahead of time, so teammates can jump in and start chatting, avoiding the "Zoom silence."

- **Celebrations:** We kick off every All Hands with about 10 minutes of celebration of all we've accomplished since the last sync. We also celebrate teammates' new homes, new pets, engagements, marriages, Bufferversaries and more! Beginning on a positive note sets the tone and builds energy right away.

- **CEO update:** This is often the most substantial section of the sync, generally at least 15 minutes and often up to 30 or more. It's the team's opportunity to hear what's on the mind of our CEO and where Buffer is headed.

- **Area highlights:** Every area of Buffer gets 3-5 minutes to share something new or remarkable within their department, or update the full team on their projects or initiatives.

The order and flow of these sections depends a little on the overall tone we're trying to achieve (intense updates, or are things light and more celebratory?) and what worked or didn't work last time.

## 5.5 Webflow's company-wide meetings

### Interview with Vlad Magdalin, CEO at Webflow


*The original post can be found here.*

We call them Webflow weekly or All-Team meetings and we've had them weekly for the last four years. The structure has shifted and evolved over time as we see what works and what doesn't.

The structure is usually: introduce new team members, celebrate promotions, and celebrate anniversaries. Then, there's a whole block of either marketing updates or financial updates, things that are top of mind or news of the day, and programs that we're initiating. That's just a big block open for things that matter right now.

Then, we have announcements of various kinds that we believe are appropriate for the entire company and finally, questions come in. These questions have to be asked ahead of time. Employees have the ability to ask questions with a name attached or completely anonymously.

Finally, we have a section called props, where we share gratitude for people or various things that happened during that week.

## 5.6 Lead Cookie's weekly team meetings

### by Jake Jorgovan, Founder at Lead Cookie


*The original post can be found here.*

The biggest source of inspiration for the meeting flow I will share is the *EOS Traction* book by Gino Wickman. If you are not already using EOS, or have read the book, then I highly recommend it if you have a team of at least 3+ people in your organization.

I also pulled pieces of this from Chet Holme's book called *The Ultimate Sales Machine*. This is where the concept for "Workshop" came from. And other pieces I just added in through what felt natural and made for a good culture.

This is not some perfect formula, but hopefully, it can provide inspiration or direction to you for your weekly agendas.

**Our weekly meeting agenda**

- Weekend updates
- Metrics Overview
- Rocks / Quarterly Target Update
- Product Development Update
- Operations Update
- Customer ReviewInvoicing / Accounting Review
- Time Off Review
- Workshop
- Joke
- Marble Race
- Work / Life Balance Scores

Total call time = 90 minutes

Here is what that looks like in practice...

**Weekend Updates (5-15 Minutes)**

This can seriously take up a large portion of our call, but it is one of the most enjoyable pieces. We walk through the whole team and everyone gives a quick 2-3 sentence weekend update. Sometimes someone may go a bit longer or we may have a fun conversation based around a person's update. There is nothing tactical about this but it lets us bond as a team and make jokes and laugh together. It also gives us all a bit of insight into each other's personalities.

This can take up to 15 minutes of the meeting but that is ok as the rest flows very quickly.

**Metrics Overview (1-3 minutes)**

Next, we pull up our metrics dashboard and walk through the KPI's for the company. I share more about our dashboard in another article.

This gives everyone some insight into the company's health, and team members consistently mention how they love the transparency that we bring by sharing our dashboard with the entire team.

**Rocks / Quarterly Targets Update (2-3 minutes)**

Next, we walk through our quarterly targets and the owner of each target shares an update on any progress or lack thereof. This creates accountability and keeps these quarterly targets top of mind.

**Product Development Update (0-2 minutes)**

At times we are experimenting with new products. At other times we are just running stable, but we take this time to discuss any new product line updates or ideas. Most often we just skip over this if things are stable, but if a new idea has popped up that we want to test, or a new initiative is underway, we discuss that here.

**Operations Update (1 minute)**

This is another section we often skip over. This is simply a place to update the team on any personnel changes. If we hire someone new or move someone to a different position, then we use this time and space to update here.

**Customer Review (10-15 minutes)**

This is the other largest portion of our meeting time. We take 10-15 minutes to walk through our entire chart of customer accounts. The manager over the individual account will share a 1-2 sentence update on each account unless there is something of concern.

This helps team members sync on anything that they need to communicate with each other about accounts. Strategists can talk to account managers and quickly sync.

This also serves as our weekly “Customer Health Check”. At this point, our team will raise any red flags saying “This account is not doing well,” or “I’m concerned with the responses we are getting here,” or “Our client has 5 leads that have been sitting for a week they haven’t responded to.”

These health checks help our team proactively dive in and fix problems instead of just responding to client complaints. This is crucial to what sets us apart from so many other companies.

**Invoicing & Accounting Review (1-3 minutes)**

At this point, our operations director pulls up our invoicing system and discusses any accounts that are up for renewal in the next 2 weeks. This is a chance for him to sync with team members on billing.

Simple things like these can be synced on verbally in just a few minutes and eliminate countless Slack messages back and forth.

**Time Off Review (2-3 minutes)**

Next, we go through time off requests. We keep a log on our standup agenda of any team members who are taking time off and hold any discussions here to facilitate and make sure that the person is properly covered.

**Workshop (30 minutes)**

This is the fun part of our weekly calls. For a long period of time, we held two 60-minute calls. One was our standup, and the other was our workshop. Eventually, we combined those into one 90-minute call and found it to be much more time-effective.

Workshops are simply a time and a place for the team to discuss problems together. We keep a board of workshop ideas for improvement, or problems to discuss. This helps us isolate all of these conversations to a weekly time instead of trying to fix fires throughout the week.

Whenever someone comes to me with a burning problem or idea, I simply say “Bring it to workshop”. This prevents us from having massive distractions in our day since we have a weekly space to discuss these items.

**Weekly Jokes (3-4 minutes)**

One of our company values is to have fun and stay positive. To keep in line with this, we take turns having a few people share either a joke or a 60-second funny video each week. This is a super fun and laid back way to end each meeting.

**Marble Racing (3 minutes)**

Somewhere along the line, my ops guy had the idea of having the whole team watch Marble Races together… It’s basically like horse racing for marbles. We get a hoot out of this and eventually even created our own Marble Race series… Our team loves this and it is a weekly highlight.

**Work / Life Balance Scores (3 minutes)**

To wrap up each meeting, we give work-life balance scores on a rating of 1-10. Since “Life > Work” is one of our core values, we always want to make sure people have a reasonable workload and that we are not ever driving someone to poor quality of life by overworking them.

We take these seriously and if someone gets a 7 or below on a consistent basis, we seriously look at how to fix or improve that person’s role or workload.

**Our weekly call is often a highlight of the week**

In a world where most people dread meetings, we love ours at Lead Cookie. It is seriously something we all look forward to each week. Since we all work remote, it acts as both a social occasion and a chance for us to align on key business items.

On many occasions, I’ve laughed so hard during our standups that tears have come from my eyes. It’s just a great time and something I look forward to every week.

Meetings don’t have to suck.

They can be fun.

This is how we run them. It’s not a perfect formula, but it’s perfect for us. Hopefully, this provides some inspiration in how you run your weekly meetings.

## 5.7 The level 10 meeting agenda

### by Nancy Ray, host of the Work and Play podcast


*The original post can be found here.*

Wanna know the secret to our team meetings? Stick to a planned agenda! Here's a glimpse behind the exact agenda we use for every single team meeting:

**NRP's Level 10 Meeting Agenda (as adopted from the book *Traction*)**

- **Prayer and Good News:** We each share brief personal and work good news.
- **Scorecard Review:** We report on our individual scorecards that we fill in weekly, where we succeeded and where we struggled.
- **Rock Review:** We simply say "On/Off Track" to our quarterly "rocks" or goals.
- **People Headlines:** We share positive and critical feedback from clients.
- **Issues List:** We take the bulk of our time to tackle and "issues" we are currently facing. This can be anything from branding to bookings to technical questions. ANYTHING that is an issue!
- **Action Items:** We leave with clear individual action steps.
- **Rate this meeting on a scale of 1-10:** We each go around the room and rate the meeting!

Typical business meetings are boring, they drag out too long, they pertain to everyone else there but not me, or they feel like a waste of time. At least that's how I always felt, and to be honest… that's how I ran our team meetings for a long time. Until  I was introduced to a Level 10 Team Meeting!

Over the past year we have been integrating the Entrepreneurial Operating System (EOS) into Nancy Ray Photography, and we have loved it. EOS comes from the book *Traction*, and it's a simplified, thorough way to run your business. ANY business. Truly – it can be applied to a small business like mine, but there are several multi-million dollar businesses that use the same model.

It's brilliant.

The Level 10 Team Meeting comes from EOS. This meeting agenda is one small part of EOS. If you want to find out more, I highly recommend reading the book *Traction*.

Here are the meeting guidelines:

- Meet at the same exact time, for the same amount of time, every week.
- Follow the agenda as outlined, being extremely respectful of time.
- Come prepared, and plan to leave with action items.

Once we began using this Level 10 Meeting Agenda, we all felt valued, included, and like it was a huge benefit to our team and our time – not a waste! It has been a game changer in moving our goals and our team forward.

Our favorite part of the meeting is the last section: rating the meeting!

In the world of NRP, it gets a Level 10 if we covered solid content, if we started and finished on time, if we stuck to our agenda, if we had yummy food, and if someone cried (which usually happens).

We always strive for a Level 10!

## 5.8 Fellow's Engineering team meetings

by Alexandra Sunderland, Engineering Manager


*The original post can be found here.*

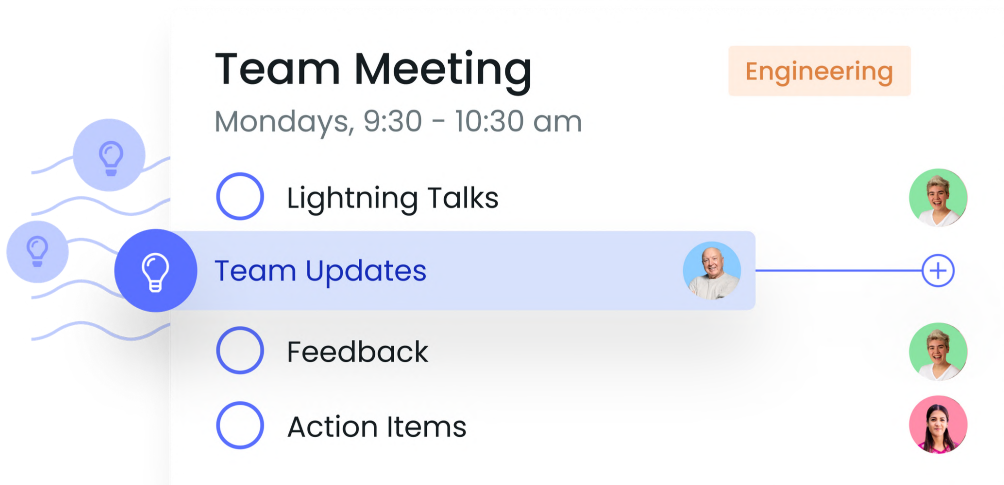
As is always the case in a growing company, my day is filled with a lot of meetings and events to prepare for. Today I want to tell you about our engineering team meetings.

Here at Fellow, we're big believers in running effective meetings that benefit everyone involved and empower teams to work better together. We live by that in our engineering org, where we have bi-weekly engineering meetings to keep each other up to date on project developments, ask questions, convey any important updates, and foster a culture of collaboration.

As you might have guessed, we have a template for these meetings. The template is a series of headers (Lightning Talks, Updates, Feedback, Other, Action Items, Notepad) with space for everyone to contribute whatever is on their mind.

We chose these headers because they provide us with just enough structure to make sure we're having productive conversations, and they encourage people to think about what they'd like to bring up throughout the week.

By adding an explicit space for feedback on team/process/etc we're showing the team that it's okay (and even encouraged) to bring those items up.



The template is one thing, but getting everyone on the team to add items to it is another – and arguably the most important part.

The day before the meeting, I use Fellow's "Send Notes" feature to send the template to our #dev Slack channel. Everyone can see the note contents and can add talking points about demos they want to give, or updates and ideas for the team, all without having to leave Slack.

**Distributed team meetings**

Sometimes, people have to join the meeting from home, or even halfway across the world. Distributed work is becoming more and more common, and flexible work-from-home policies are becoming the norm in tech companies. Being able to use a remote meeting software like Fellow has helped me feel part of the conversation, even when I'm not in the same room as everyone else.

**Asking for meeting feedback**

Every few months, we use Fellow's Feedback tool to ask all the engineers in this meeting what they think of the format, and whether it's a good use of their time. That's how we renamed our "Demo" template header to "Lightning Talks," because we found out that sometimes people want to give tech-talks that aren't specific to the product. We're always iterating on our meeting format, especially as the team grows!

# Closing Thoughts


Congrats, you're now fully equipped to run best-in-class team meetings.

We hope these strategies and insights help you drive more value for your team and run meetings that keep everyone aligned, inspire collaboration, and boost morale.

Remember that team meetings are one of the most powerful tools you have as a leader. Use the examples included in this guide to get inspired and build a meeting structure that works for your team.

If you need more meeting inspiration, you can check out Fellow's meeting agenda template library.

Finally, don't forget to subscribe to the Manager TLDR newsletter and check out the Fellow Blog to fast-track your way to being a great leader!

# About Fellow

Try it free

## Encourage everyone to show up prepared

It's rare to have a productive conversation when nobody has a plan for what to talk about.

With Fellow, your team can collaborate on an agenda, prepare materials in advance, and write questions to ask during the meeting.


## Bring all voices into the conversation

If you're brainstorming ideas and making decisions, you'll get better results when your whole team contributes.

Fellow's real-time notetaking tool promotes collaboration and encourages everyone to participate actively in the conversation.

## End with an action plan

A team meeting without action items is just a status update. Make your meetings more productive by tracking key decisions and next steps.

With Fellow, your team can record action items in real-time, track and prioritize tasks in-between meetings, and automatically carry-forward incomplete action items to the next meeting.