



## Turn Internal Communication Meetings Into a Competitive Advantage

**Steve Sanduski:** We have another great show lined up for you today on The CEO Coaching International podcast. I'm your host, Steve Sanduski and joining me today is Sheldon Harris. Sheldon is a coach at CEO Coaching International and prior to joining the firm, he held a number of leadership positions including President of Coldstone Creamery and he led the company as it grew to a system wide revenue of half a billion dollars with fourteen hundred stores and fifteen thousand employees around the world. He also has been involved in several other entrepreneurial ventures and Sheldon, it's great to have you on the show.

**Sheldon Harris:** Steve, thanks for having me. It's great to be on the show.

**Steve Sanduski:** Sheldon, what we want to talk about today is something that I would say is the bane of the existence of all leaders and that is meetings. That we know we've got to have meetings but oftentimes, we all find that meetings, we think they're kind of a waste of time, they're inefficient but you have come up with some ways to make meetings efficient, to get stuff done and make things happen. That's what we want to talk about today so why don't you set the stage for us if you would?

**Sheldon Harris:** Steve, I think that's a great topic because it's something that every business struggles with which is, it's really around the topic of effective communication and coordination of effort. In the work that I do with my CEO clients, when I begin working with them, I find they're either in one of two camps. They're either in the camp that realizes meetings are not very effective so they just don't have any or they're having them but they hate having them because they realize it's just a big suck of time and energy and nobody feels good about a meeting. It just was a big waste of time so that seems like that's the problem that we're trying to solve for.

**Steve Sanduski:** Okay. Let's talk about obviously there are different ways that you can communicate within an organization. We can communicate via email, we can communicate via the phone. We can do a go to meeting and be on video if people are in different parts of the country or different parts of the world or we can have an in person

meeting. Are there certain types of communications or decisions that need to be made that are better handled in one of those forms or another?

Sheldon Harris: Yeah. In my mind, the first thing you've got to figure out I think is what is the purpose of the meeting? It seems like to often a meeting comes together but the purpose isn't clear so everybody swirls around in conversation and then leaves unclear of even what we achieved because we didn't know what we were setting out to achieve. The other problem with that is we don't know who should be in the meeting because if we knew clearly what the purpose was, we'd know how to involve and who didn't need to be there but clarifying what it's all about I think is absolutely critical.

I look at this like a meeting is a chance for us to break down silos and coordinate our efforts cross functionally which all of the other avenues of communication don't do as good a job as an actual meeting and whether that's face to face or many of my clients are multi national and they have to do it WebX, it's still the purpose of getting together to break down silos and lock arms to work as one team.

Steve Sanduski: Okay. The person who is calling this meeting, if you're the one whose going to call the meeting, what should that person know? Do they need to go in, "Okay, I need to have the purpose for this meeting. I need to create an agenda," what are some best practices along those lines?

Sheldon Harris: To me, there's a cadence of meetings that are, I would say, traditionally the best practices that I see work in a variety of industries, geographies, cultures and they're common to most organizations especially as they start trying to scale and with scale, when we're small, everybody knows what everybody's doing but if they start trying to scale, there starts to become this breakdown between function areas. Specifically, the meetings that I'm referring to is I really think there's a cadence of four key meetings, recurring meetings. I'll go quickly through these.

One is I'm going to call it a monthly, all hands meeting where literally, the entire team that can possibly assemble, again, whether it's in person or by phone or however they need to connect in, feel like they're part of a big team huddle once a month, so twelve times a year. I always say the purpose of that meeting is to inform and inspire and if we really think about, it's like a turbo charging huddle for our entire team. That in my mind is one of the four key recurring meetings that effective organizations utilize.

The second of these is more of a town hall format which is, this is more of an open Q&A where typically the CEO is in front of the team and just fielding questions in a very transparent, very vulnerable fashion. Often soliciting those questions ahead of time through a tool like SurveyMonkey so it can be done anonymously but then literally standing in front of the team and answering the questions that are on the team's mind that are the most difficult to answer and I always say is, "As scary as that might be to the CEO, the answer that they put out to questions is going to be

way worse than whatever answer you're going to give them, so better to just stand in front and do that."

Steve Sanduski: Sheldon, how often would you recommend they hold a town hall meeting?

Sheldon Harris: The best practice I see in the clients I work with is usually once a month they're doing that and it just keeps the air clear of all those big issues from building momentum behind the scenes.

Steve Sanduski: Are any questions off limits? There's always going to be that brave soul in the audience whose going to ask the big elephant in the room question. How do you see leaders handle that?

Sheldon Harris: I want to recognize that and really welcome those really tough questions. If we shy away from those, it really undermines the teams belief in leadership and what I want to do is recognize that that's an outstanding question. Now, there's certain things that I'm not going to be at liberty to answer when I'm in that role if it's confidential relating to a transaction, a sale of the business, personnel issues that are confidential.

Obviously those things are off limits and I'm not afraid to say that when I'm in front of the group but most things I can address in front of the group, even if it's to say, "That's a great question and we're working to find the answer to that question. I don't have it today but I want you to know that it's top of my mind too." If you get the tone I'm getting at, it's just that vulnerability and transparency that really fosters the trust of the team.

Steve Sanduski: You mentioned the monthly all hands meeting, the purpose is to inform and inspire. Then we've got this monthly town hall meeting. Is the difference between the two that the town hall is really just more of a Q&A whereas the monthly all hands is just more of the CEO or one of the senior leaders of the company is doing most of the talking and it's not really focused on a Q&A part?

Sheldon Harris: That's exactly right. The first of those, the all hands meeting is outbound communication and it's literally multiple presenters is typically the best way to do it, each presenting on the highlights from their function area with again, the objective to inform and inspire. There's not really an opportunity for interaction, it's more of a presentation whereas the town hall, there is no presentation. It's all organic and live interaction with the CEO.

Steve Sanduski: Okay. Now for both of these meetings, if your company has multiple offices or is international, do you recommend that people get hooked up via the internet or video so that everyone around the world, all the offices can be in at the same time or is this more just the people that are kind of in that main headquarter location that would be involved?

Sheldon Harris: No, it's the first of what you said. It's trying to include as many people as possible,

even if they're just dialing in and hearing it, that are able to participate. Then typically if the time zones are very diverse, it may be a good idea to actually take video of the meeting and post that on the company internet so that those who couldn't participate can after the fact log in and take a look at it and at least be exposed to what went on in their absence.

Steve Sanduski: Okay, good. All right, we've got the monthly all hands meeting, we've got the monthly town hall meeting. What would be the third recurring meeting?

Sheldon Harris: The third recurring meeting, I'm going to call it the weekly leadership team meeting. This is typically the CEO and I'm going to say the eight, maybe six to nine function leaders in the company that are coming together each week. This is one of the most powerful meetings when it's done correctly to accelerate the trajectory of the business. This is one of those times when the leaders come together and I always say when they're coming into this meeting, the critical thing is that they come in holding two hats in their hands.

One hat is the hat of their function area so they're there to represent their function and also be a conduit back to their function area or their business unit after the meeting so it's a two way communication responsibility. That's certainly one of the hats and one of the responsibilities but the other hat in their other hand I always say is the hat of like a board of advisors. This team, this leadership team that's assembled around the table is not only there just to think about their silo or their function but is there to help all of us steward the leadership of the organization successfully if that makes sense.

Steve Sanduski: Yeah, sure does. Now I'm sure this is going to vary from company to company and depending on the size of the company and how many people you have at that meeting but what would be a typical length of time for this weekly leadership meeting? Are we talking a couple hours?

Sheldon Harris: I prefer to see these things get to one hour ...

Steve Sanduski: One hour.

Sheldon Harris: ... and I'll be happy to share the very straight forward agenda that I've seen used so successfully in so many settings but the objective is an hour. I will admit that with larger teams or more complexities, sometimes they may be ninety minutes but I think if it's longer than that, it's probably a different type of a meeting than a weekly leadership team meeting's going to handle.

Steve Sanduski: Okay, all right. What's the agenda for that meeting then?

Sheldon Harris: This agenda is I'm going to say battle tested in so many arenas but it has got to be the simplest agenda on the planet. Here it is, it's easy to remember. It really breaks down into four categories. The first is results, the second is progress, the third is issues and the fourth is discussion and I'll unpack those for you just a bit. If I

mentioned this meeting, say we're going ourselves for a one hour meeting, results, we're going to quickly review the top level weekly KPI score card that pertains to the overall leadership team. We're looking at the score card that shows the top metrics for the company and we're quickly dialing in on top issues or key successes on that score card so the results category of this weekly leadership team meeting is probably a ten to twelve minutes of the meeting focused on the results. Does that part make sense?

Steve Sanduski: It does and that's the results for the company as a whole? You're not going around to each of those six to nine functional leaders and showing the KPI's for their group, are you?

Sheldon Harris: That's exactly right, that's exactly right. We are looking at the roll up of the most important ones for the overall company which if we find an area that needs further dissection, we can take an action item for after the meeting to get the appropriate people to go dive deeper into the underlying data in their areas.

Steve Sanduski: Okay. We're saying what the results are but we're not really discussing it yet, correct?

Sheldon Harris: That's correct.

Steve Sanduski: Okay.

Sheldon Harris: We're collectively acknowledging how we're doing as a team on the top measurements for measuring our performance.

Steve Sanduski: Okay, then we move into the progress.

Sheldon Harris: Yeah. Next is progress and what this really means is how are we doing on moving the key initiatives forward that ultimately are going to generate results so it's kind of the leading activities if you will of the results that will hopefully show up in a KPR score card at some point. Progress is really a brief update on the key initiatives that we're driving forward. What's an important distinction here though Steve is we're not talking about a rehash of our to do list. This isn't about all the activities we're doing, it's about the movement of the key projects that the various functions are working on.

The way this progress section of the meeting works is each leader around the table gets three minutes to give an update on the key things that this group needs to know regarding their function area and the projects and activities that are going on in that area. It's a remarkable exercise in disciplined communication and prioritization because each leader has to think, how do I boil down the synthesis of what my peer group around the table needs to know so that I can articulate it clearly in three minutes, which we all know what typically happens in a meeting is you have somebody starts talking and it becomes a runaway that takes twenty minutes instead of three minutes.

Steve Sanduski: Right, right. Okay. We've got results, we've got progress, what's the third one?

Sheldon Harris: The third piece is issues and so this is really a matter of the open ended thought of what is getting in our way. What is getting in our way and allowing the team to contribute to what are the key things getting in our way. Usually I'll ask what's getting in our way followed by the continuation of what else, what else, what else until we've got the high, hard ones before us and then we'll identify what is the biggest issue getting in our way. If we don't already have a solve for that or nobody working on a solve, if it's worthy of discussion, this rolls to our fore section of the agenda which is discussion.

Typically this discussion, we may choose one of these key issues we just raised and keep in mind, in a one hour meeting, we're not going to unpack the entire thing and solve it but we're going to make movement and ideally come out with what are the specific next steps. Basically, who is going to do what by when, who is going to do what by when coming out of this brief leadership team discussion to tackle or get at the root of the issue we're trying to solve, if that makes sense.

Steve Sanduski: Yeah, it sure does. Okay. We've got a lot of things going on here with this weekly leadership team meeting. Now just some logistics here. Who is running the meeting? Is it the CEO that runs the meeting as a facilitator or how does that work?

Sheldon Harris: Yeah, I think that's typically the best practice is the CEO is facilitating it but keep in mind, I like the word facilitating more than running it because as the CEO, what you're really doing is orchestrating the meeting more than you're not doing any more talking than any of the other participants. You're just making sure that things are moving along on time, we're staying on track. If items bubble up that are worthy of discussion but they're not appropriate for this meeting, we make sure they get documented in a parking lot, noted somewhere on the side so that we don't lose track of them and we can deal with them later so that's really the role, the function that the CEO is playing in this particular meeting.

Steve Sanduski: Okay. How about taking notes here? There's a lot of stuff that's going on, a lot of conversation that's happening. Is there an admin person whose in this meeting that's taking notes and then after the meeting, does this person write up like a summary and to do items? How does that work?

Sheldon Harris: Yeah, really the only thing that I'm keen to try to track out of this meeting is the action items and typically through the meeting we'll identify when an action is required, who owns that or who is going to do that. One of the things that I find really enlightening Steve is in a meeting like this, when an issue comes up or there's a question and the first thought is, who owns that, if it's very clear and somebody's hand shoots up right away, "I own it," I know we're in good shape.

Because if somebody owns it, we can probably solve it but what often happens, we'll find that our issues lie when we say, "Who owned that," and everybody looks

around the table and there's a lack of clarity. The first thing is figuring out through the evolution of our weekly meetings and behind the scenes, we get clarity on who owns these things so when something comes up, it's clear whose camp that falls too.

Steve Sanduski: Okay. An item comes up, Joe says, "I own that," how do we follow up next week if this was something that's supposed to be taken care of over the course of the next week? Is someone responsible for saying, "Last week we talked about such and such Joe, you owned it," and he gives the update? Do we just assume that Joe's professional and he gives the update as appropriate or is there some type of verification mechanism to make sure that what we talked about at the previous weekly meeting gets addressed if needed at the next meeting?

Sheldon Harris: Yeah, it's a great question Steve and this really changes with the development and maturity of the leadership team. When a team is less evolved in their leadership roles and less evolved functionally as a team, it's a great idea to have somebody, an executive assistant or what not documenting the key takeaways and sending out the recap after the meeting for who agreed to do what and then probably sending it out ahead of time before the next meeting.

What's the status of these things or be sure to address the status of these things in the meeting but what I find is that, as a team works together in this format we're describing, it really does become a matter of the leaders around that table become very disciplined in holding themselves accountable for making sure that in their next weekly meeting, in their three minute update, they're swerving back and touching on the action items or the outcomes that they needed to deliver based on their prior commitment in the previous meeting.

Steve Sanduski: Okay, good. You talked about the four recurring meetings, we got the monthly all hands, we've got the second one as the monthly town hall, third one is the weekly leadership team meeting. What's the fourth key recurring meeting?

Sheldon Harris: The fourth key recurring meeting is the one on one meetings that take place with your direct reports. I'll take it from the perspective of the CEO but this would apply then even with the other executive team leaders and their direct reports but what often gets missed is I'll hear my clients say, "I already meet with my people on a regular basis. It's ad hoc and we pass in the office or we speak on the phone," whatever the case may be but what I'm suggesting is more of a structured cadence to a weekly one on one meeting.

Where it's the CEO one on one with each direct report. These meetings are also typically an hour long and they're one on one focused exactly on that one leader and that one function area. The agenda for that is going to sound remarkably similar to what the agenda for the leadership team meeting, for the assembled group because it's going to go in that same cadence. Results, progress, issues and discussion but in this case, it's going to be a little more granular and drilled into that particular leader and that particular function area.

Steve Sanduski: Okay and that makes complete sense. What about the CEO themselves? They report to the Board of Directors, what kind of cadence would the CEO have? Is that up to the board? Are they going to have regular meetings with the board or how have you seen that work?

Sheldon Harris: Yeah, it probably really is up to the board although I always advocate with the CEO's I coach that I think the board respects a CEO that helps bring clarity and structure to even their relationship. Even though the CEO may report to the board, that doesn't mean you don't want to be in a passive position as the CEO waiting for the board to orchestrate. I'd rather take a proactive role in doing that. Again, based on the business and the needs of the business, ideally I think that's probably could be a monthly meeting with the board or a quarterly meeting depending again on the unique situation of the business.

Steve Sanduski: Okay. Do you have some other best practices ideas here? I know you've talked about every meeting should have a stated purpose. Should every meeting have a written agenda or maybe a digital agenda?

Sheldon Harris: I'm going to say this, it needs an agenda that everybody understands and knows. Now the meetings I'm describing, the agenda is literally those four words. Results, progress, issues and discussion so I literally will hand that out or recommend a CEO hand that out until everybody's clear, "That's the order we're going in," but it's pretty simple to get a simple cadence around that and then it's just a matter of executing that cadence. But there's a couple other best practices that I really believe help make all of this work.

One is, it's so critical that we as a leadership team develop a culture of discipline and a culture of accountability in our organizations in order for us to be effective and it really starts with us. Little things like the meetings should start on time, start right on time and people will get that expectation that everybody's expected to be in the meeting and start on time. When we're in the meeting, I'm a stickler. There should be no multi-tasking. I mean, I don't mind if people are taking notes using their technology to take notes or whatever the case may be but our minds should be in the room.

Further to the end I always say that in communication, there's really the three C's of communication that are important which is clear, concise and compelling. Part of the challenge I give the team and then encourage my CEO's to give their teams at the beginning of these meetings is, "Remember, we're going to conduct ourselves along the lines of those three C's. Clear, concise and compelling." Those simple things, as simple as they sound, if you practice those regularly, they become part of our culture and really help us be more effective.

Steve Sanduski: Just to add to that, start on time is finish on time. We all know those leaders who ...

Sheldon Harris: Amen.

Steve Sanduski: ... they don't end on time or they don't start on time and studies have clearly shown that when people have fixed deadlines that you tend to be more creative because you know that you've got an end point here that you've got to finish and that helps I think focus the mind to get things done so I definitely would add to finish on time as well as start on time.

Sheldon Harris: I couldn't agree with you more on that. That's just critical and again, it seems like a small thing but it really conveys a powerful message in terms of the expectation of how we're going to operate as a team together. One other final best practice I'd share that I just think is really significant in helping this work. At the end of any recurring meeting, I'm just going to say that weekly leadership team meeting, let's just talk about that one.

At the end of that meeting, I love making sure we're done with our discussion item at fifty eight minutes in so we have two minutes remaining and the last two minutes, Steve, what I like to do is go around the table and ask every single person around the table to grade the meeting. Grade the meeting. You can grade it in A, B, C, D or S and the only thing I'm asking, if you didn't grade in an A, state what would have made it an A. This is a really amazing catalyst for continuous process improvement because what happens now is instead of people going away from the meeting going, "Wow, that was a terrible waste of time. I didn't appreciate that meeting, I didn't get anything out of it."

This is their chance to say if they believed that and what would have made it an A. It takes all of the pressure off of, in this case, the CEO or the facilitator of the meeting feeling like, "I somehow am responsible for making sure everybody gets something out of this meeting," and puts that burden back on the team collectively again as a board of advisors if you will. We're all responsible for making this meeting an A or striving for that.

For example, going around the table and getting grades, somebody might say, "This meeting was a C because we started five minutes late or not everybody was here on time so some people didn't hear the discussion that took place when we reviewed the results," or it could be, "I'm giving it a B because I feel like there was some people that went on to long beyond their time to update." Whatever the case may be, the team starts to recognize what are the factors that are impacting the success of the meeting and takes a collective responsibility for striving for it to be an A.

Steve Sanduski: Along those lines, you mentioned that maybe somebody gives it a lower grade because it didn't start on time. What happens if you've got six people in the meeting or supposed to be in the meeting, five are there but one key person is not and it's time to start the meeting. Do you go ahead and start the meeting just to make a point that hey, this is our culture. We start meetings on time and if you're late, you're going to miss out on the first few minutes."

Sheldon Harris: Yes.

Steve Sanduski: Yes, okay.

Sheldon Harris: Start the meeting.

Steve Sanduski: Start the meeting.

Sheldon Harris: Yeah. Then as the CEO, after the meeting in addition to the team grading it which is really effective, one of the most effective little techniques I've seen for improving meetings but as the CEO after the meeting, if there's something like that's occurring or I've got an issue, that's the great time to have a quick conversation one on one with that person and just say, "Just so you know, my expectation is that going forward we're going to be on time," or, "Going forward I'm going to expect you to come prepared," making sure we're taking a moment to do that coaching in the moment one on one and privately when appropriate.

Steve Sanduski: Okay. Should every meeting have a clear decision maker?

Sheldon Harris: I think if it has that clear purpose, part of what goes on in that meeting might be requiring a decision and then we do need to have a clear decision maker but I think what it needs, in my mind more than necessarily a clear decision maker is a clear set of ground rules and a clear facilitator to make sure we achieve the stated objective of the meeting.

Steve Sanduski: Okay. All right. Sheldon, any other thoughts that you want to add here?

Sheldon Harris: One thing that people hearing this might think, it's an objection I hear often when I'm coaching my CEO's to implement this meeting cadence is they'll say, "Sheldon, what about all the time? Just adding up all those hours, the one hour meetings with my direct reports each week and then the hour for the leadership team meeting and then these couple of monthly meetings. This is a lot of time." I can't argue with that. It is a lot of time which is clearly our most precious and scarce resource but what I would suggest is that using these hours in this way and effectively as we've described in here in this conversation will actually give you time back.

You're actually going to have an ROI or return on effort, ROE from structuring it like this and resoundingly, the feedback I get from the CEO's that implement this in their businesses is exactly that. That they felt like they'd made the leap of faith and ran the cadence exactly as we've described and after the fact, they're realizing they're so much more effective and their teams are so much more effective after they've implemented this.

Steve Sanduski: Sheldon, I know this is going to vary from company to company and will vary depending on the size of the company but what have you seen in terms of as people get to the CEO level, can you make any generalities in terms of the percentage of time that they're going to be spending in meetings? When they're in

the office, I know a lot of times they're going to be out traveling, meeting with customers and so on and so forth but when they're in the office and you're the CEO of a hundred million dollar company, let's say, what have you found in terms of what their day would look like?

Sheldon Harris: Yeah. I always think that for the CEO, really if you're boiling down the essence of just the most important priorities, to me it comes down to two key things. Strategy and people and making sure we've got the right strategy. We're executing that way and we've got the right people in the right roles in order to execute that strategy. In my mind, these effective meetings we're describing are really on that people side of things. We're orchestrating. We're conducting the efforts. Now, as you mentioned, this will evolve with the size and scope and scale of a business.

When it's a smaller business, the CEO is going to be more intimately involved. Obviously when the business gets over a hundred million, there's a lot more complexities. The CEO may have a right hand person, a president or a COO that is executing some of what I've just described here in this conversation so it's really hard to give an exact answer to that except to say that I believe an effective CEO will find that some of these meetings we've described here would be the highest and best use of their time and energy.

Steve Sanduski: Great. Sheldon, fantastic. Great insights here to help our CEO's and entrepreneurs be more efficient and productive in the meetings and I really like how you laid out these four key recurring meetings. I think we've got some really good specific ideas on that that will help the communication within the company and as you and I both know, every company that I've been in and probably every company that you've been involved in in one way or another, the people usually complain about communication. There's not enough of it and leadership is not sharing what the rest of the team would like to learn about and that sort of thing so I think you've really laid out a really nice game plan here for leaders of companies to put a key recurring meetings in place and do a better job communicating throughout the organization.

Sheldon Harris: Yeah. You're spot on. It really is highly effective and I've seen it with my own eyes over and over again in so many different settings. It's a theory that's been proven to be effective and I guess I'd end with this thought. No matter what business we're in, we're clearly only in one business. It's the people business and so much of people is coordinating and communicating and so if we can put our effort into doing that effectively, all of the results that we want to achieve come as a result of that.

Steve Sanduski: Great. Sheldon, I think that's a great place to wrap up here so thank you. Appreciate the great insights that you've shared and we'll look forward to the next conversation.

Sheldon Harris: Sounds great Steve, thanks for having me today.

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