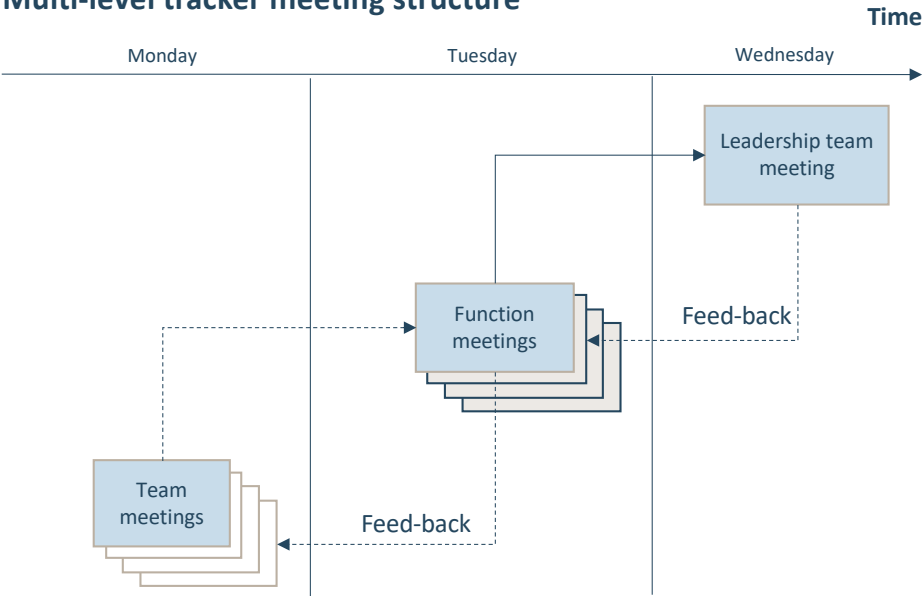Tools for MEDIUM Businesses

Level 2 Question: Do we have a method (meeting Structure) to follow up and adjust in case of deviations in performance?

Title	Multi-level Meeting Guideline
Why	As you increase the levels in your organization, the risk of losing transparency and agility increases dramatically. You need to make all people and teams aligned on the overall priorities and objectives and you need to assure progress. If a team at a lower level in the organization encounters a roadblock for progress, that they are not authorized to solve themselves because it is cross functional, out of budget scope or otherwise, there needs to be a system in place to make sure that you can escalate these issues and quickly resolve them.
What	A multi-level meeting guideline enables you to organize a series of interconnected status meetings at all levels of the organization, that assures that issues and problems can be escalated to the appropriate decisionmakers, and that decisions and solutions quickly can be cascade back down onto the organization. These status meetings, or tracker calls, needs to be focused, well-organized and synchronized in order to resolve issues fast. The typically duration of a tracker meeting is 15-30 min. **Multi-level tracker meeting structure**
How	The Multilevel meeting takes its departure in the overall Business and departmental Annual and Quarterly Objectives, Key results and initiatives.

	These will have been developed as part of several other tools:

	1. Objective and target setting
	2. The Strategic execution tool
	3. The Dashboard tool
	
	Furthermore, you will benefit from reading the Effective meting tool as a pre-requisite for implementing multilevel meetings.
	
	Follow these steps to design your multilevel meeting structure
	
	1. Levels and functions
	    a. Identify Vertical levels in the organization, that needs to be included (typically 2-3 in medium sized companies)
	    b. Identify How many functions needs to be included.
	    c. Identify if any cross-functional meetings are needed below the senior leadership layer.
	
	2. Objectives and Key results dashboards
	    a. Using the OKR-model (see the OKR tool), Use the Annual and Quartey Objectives and Key results (also known as Rocks) to build an informative dashboard for each team, whith their relevant Targets.
	    b. The dashboard will typically be a mix of metrics (i.e. # of orders) and progress measures on key initiatives and projects.
	    c. Establish a robust process for capturing and data and update dashboards, so everybody are looking at updated data.
	
	3. Meeting Set-up
	    a. Develop Meeting Agendas (very consistent across all areas)
	    b. Establish Rules-of-engagement (see effective meeting tools)
	    c. Define Meeting cycle requirements: Preparation, Execution, Follow Up
	    d. Train your teams in performing effective Tracker meetings
	
	4. Meeting Rhythm (Pulse)
	    a. Define an appropriate meeting rhythm or frequency. This could be daily, weekly or monthly.
	    b. Try to organize meetings so that they are not al at the same time. This gives the leaders time to participate in meetings in other functions and teams and improve cross-function communications.

Template	See next page

Meeting Structures (Intervals can be hours/days or weeks)

	Day 1	Day 2	Day 3	Day 4	Day 5
Leadership team			9:am Weekly Tracker 1 hr. Input from all other tracker meetings, presented by functional head		
Functions					
Sales	9:00 am Weekly Tracker 30min				
Production	9:30 am Weekly Tracker 30min				
Logistic	10:00 amWeekly Tracker 30min				
Support	10:30 Weekly Tracker 30min				
Finance		9:00 Weekly Tracker 30min			
HR		9:30 Weekly Tracker 30 min			
Other.					