

EXCEL at Meetings

▶ **Engage** -----
Greetings and Good Things.

Start on a positive note by having a few people share something good - can be personal or work related.

▶ **X-plore** -----
Identify the needs of the group.

Have a copy for everyone if necessary - especially if this is new to your team.

- **Social Contract (how we agree to treat each other).**
*"Just a reminder that our social contract will be our 'rules of engagement', so let's commit to aligning our behaviors in accordance with this during our meeting. Please also be prepared to share reflections on how we did at the end of the meeting."
Share your agenda for the meeting.*
- **Ask them if they have any other needs or concerns they would like to address during the meeting.**
"In addition to the items on the agenda, do you have any other needs or concerns you'd like addressed today?"

Write down any additional needs and review these during the Empower portion of the meeting to make sure needs are addressed and / or there's a plan to revisit them at a later date.

▶ **Communicate** -----
Meet the needs you can.

Remember that this is a two-way conversation, so ask questions to check for understanding (i.e., "Did that make sense? Any questions about that?").

- **Tend to the agenda items and clearly communicate the expectations.**

▶ **Empower** -----
The W3's - Who's going to do What, by When.

This step is about defining and clarifying accountability and levels of empowerment.

- **Clearly communicate the W3's in order to address due dates.**
- **Circle back and address any concerns that were noted when we identified needs / concerns earlier in the meeting during the X-plore section.**

▶ **Launch** -----
End with reflections and affirmations.

As the meeting leader, you should close with an affirmation that demonstrates your personal regard for the team and mission.

- **Ask a few team members to give their feedback/reflections as it relates to the social contract. Pick a specific behavior in the contract. For example:**
"How did we do in terms of respecting and valuing our differences?"
- **Close with an affirmation. For example:**
"Way to go!" OR "Thanks for who you are and what you do!"