

AGENDA

Session guide: Lead a team meeting to develop a team plan to execute team goals

Date:

Time:

Location:

Attendees:

Contact:

Your preparation

To prepare for this session, you will need to:

- Schedule the team meeting in a room where you can avoid interruptions. We suggest 45-60 minutes for this discussion.
- Work through the activity yourself and think about how you personally would answer the questions, as this will provide a starting point for your team if necessary. Also, think about how the team may respond to each question. It will be important to think about where the team might stumble or struggle to move forward.
- Think about how you will facilitate the discussion. Use the facilitator tips in this guide.
- Organise the materials for the meeting.

Session materials:

- Bring a copy of your team purpose statement (Microlesson 1 included guidance to facilitate a team discussion to define your team's purpose.) and your division/branch business plan (or priorities).
- Bring copies of your team priorities and goals developed in session 1 and refined with your line manager after the meeting.
- Textas
- Post-it notes
- Blue tac
- Flipchart or whiteboard

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No	Item	Description	Facilitator tips	Time
1	Welcome and purpose	<p>Welcome</p> <p>Explain the why, the how and the what for the meeting:</p> <ul style="list-style-type: none"> • Why? Today's meeting will build off our last one where we set our goals as a team. When we have a clear plan to deliver our work we can make sure we have the right support in place to get us there and stay focused on achieving our purpose. • How? Together we are going to think about what we need to do to deliver on our team goals. • What? Coming out of this meeting, we will have an agreed list of actions we need to take and responsibilities to achieve our goals. This is an input for our Team Plan. 	<ul style="list-style-type: none"> • Close the door just before you start the meeting. This helps to signal that you want to start. • Show the why, how, what visually (e.g. on flipchart) so people can refer to this during the meeting. 	5 mins
2	Group work	<p>Actions to achieve goals</p> <ul style="list-style-type: none"> • Recap on the refined list of team goals and measures (emailed prior to the meeting). Ask if there are any questions or clarifications. • Display the team goals and measures at the front of the room. You may want to print it out in A3 or to draw it by hand on a whiteboard. • Split the team into small groups (or work through the activity as one group if numbers don't allow for smaller groups). • Assign one goal per group. Ask each group to identify the specific actions that the team should take in order to achieve that goal. • When groups are finished, ask each group to share their actions with the team. • Facilitate a group discussion to test if the detail is right. Challenge the group to think about alternative ways of doing things where appropriate. Refine the steps as you go and assign responsibility where appropriate. 	<ul style="list-style-type: none"> • Thank everyone for their input and contribution in the previous session. • Small groups are a great way to manage different styles and personalities in the room. You can either let individuals form their own groups, or if you have some challenging team dynamics, you might like to allocate people to groups. • When small groups are working, walk around to each group to check if they are on track, answer any questions and provide encouragement. 	20 mins

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3 Group discussion	<p>What should we start, stop and continue as a team to achieve these goals?</p> <ul style="list-style-type: none">• Create three flipcharts: one for “what do we need to start”, one for “what do we need to stop” and one for “what do we need to continue”.• Ask one team member to record the responses to this activity on the flip charts.• Discuss what you need to continue as a team to achieve your goals.• Discuss what you need to start doing as team to achieve goals.• Discuss what you need to stop doing to achieve goals.• Capture these insights on a flipchart.	<ul style="list-style-type: none">• If you think people find it difficult to speak up, you could ask them to individually write a post-it for each of the flipcharts.• Make sure that after the discussion all actions are sufficiently specified. You should be able to answer the question: what does this (action) look like in our day-to-day work?	15 mins
4 Close	<p>Next steps</p> <ul style="list-style-type: none">• Explain that you will take the insights generated by the team to develop a two-page team plan of the team’s purpose, priorities, goals, targets and key actions.• Explain that you intend to use this Team Plan to keep the team on track over the next 6 months, to ensure they are focused on the right things and motivated to achieve the goals.• Thank everyone for their participation – emphasise that everyone has an important role to play in achieving our team goals and that you have confidence in the team to work together to achieve success.	<ul style="list-style-type: none">• Let people know which next steps they can expect and when.	5 mins

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Actions for you to take following the session:

- Populate the Team Plan template and test with your line manager.
- Distribute the Team Plan to your team.
- Display the Team Plan in a central spot where the team can see it often.
- Refer to the team goals and targets regularly in other meetings and discussions to keep them front of mind for the team. Other strategies to inspire and motivate your team to execute on the team goals are covered in Microlesson 3.
- Continue with the Reflect and Connect activity in this lesson.

Facilitator tips to effectively lead your team discussion:

- Prepare for the session by familiarising yourself with the content and materials – particularly the structure of the session and the tools and materials that will be used in that session (their purpose and how to apply them).
- Reflect on what content you really enjoyed in this module and how you might share that with your team.
- Emphasise to your team the importance of being actively involved in the session and encourage participation by all – if team members are quiet ask them questions to encourage participation.
- Use the session to agree to a set of team commitments through listening and supporting different staff ideas. This will be critical for ensuring all members of your team have buy-in with them.
- Avoid thinking that you need to do it all alone! Work with other people managers to help run the session for additional support.

Handling questions:

- If the group discussion begins to go off topic, remind the group of the purpose of the session.
- Allocate time outside of this session to follow up any issues in the 'parking lot'.