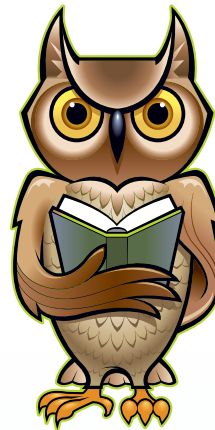


THE TRUE **COMPETITIVE ADVANTAGE**





MEETING GUIDANCE

- **Clearly define the intent of the meeting with an agenda**
 - Brainstorm?
 - Review KPI's?
 - Manage a project?
 - Planning?
 - Culture?
- **Avoid mixing "bird-type" meetings (discussing KPI's, then trying to get creative, then talking about culture)**
- **Who needs to be present? (or who can get a summary afterwards)**
- **Engage participants and get input (even from reserved attendees)**
- **Start and end on-time (or early if you've covered what you need!)**
- **Close with an action plan (who, what, when)**
- **Summarize the meeting and send with a follow up email**



How Can We Make Meetings:

- More Productive
- Succinct
- Deliver Results
- More Fun
- Collaborative

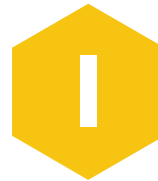
MEETINGS: BIRD STYLE



DOMINANT

Tasks Assignment/Accountability/Decision

- Lead with the intent up front
- Fast paced, Task oriented, brief
- Daily or weekly stand-up meetings
- Decisions
- Zoom or call is sufficient



INTERACTIVE

Vision Development/Problem Solving

- Relaxed, fun environment
- Brainstorm and free thinking
- Half-day or full day off-site
- Whiteboard/ In person



CONSCIENTIOUS

Data Analytics/Planning

- Fact-based
- Detail oriented
- Diving into a process, technology, system and planning



SUPPORTIVE

Culture/Mentoring

- Calm
- One-on-one discussions or group “check-ins”
- Check in on how people are “feeling”
- In person

PRESENTATIONS: BIRD STYLE



DOMINANT

Tasks Assignment/Accountability/Decision

- Agenda outline (3-5 bullets)
- Give them the readers digest version of what you need from them (if using slides, slides 2-3)
- Tell them what decision needs to be made



INTERACTIVE

Vision Development/Problem Solving

- Give a few minutes at the beginning to engage with others
- Share the vision or problem you're trying to solve for
- Hype up the benefits early on



CONSCIENTIOUS

Data Analytics/Planning

- Give as much data and specifics as you can
- Give them time to be skeptical and asks questions
- Ask them to help you with the implementation



SUPPORTIVE

Culture/Mentoring

- Give them time to process information
- Highlight how this will impact people & culture
- Bring them in early to help champion decisions

EMAIL GUIDANCE

- **Write a short greeting and then the intent of the email in the first sentence.**
- **Summarize emails with what you need, from whom, and when.**
 - Decision?
 - Report?
 - KPI's/ Analytics?
 - Planning?
 - Culture?
- **Avoid sending emails that are emotionally charged.**
- **If you have multiple “bird types” on the email, try to bring each element of the “birds” into the text, starting with the Eagle.**
- **Only cc people who “need to know” or are involved in the action plan.**
- **Do not send anything that you do not want on record. Ever.**



How Can We Make Emails:

- More Effective
- Succinct
- Less Abrasive
- Inclusive

EMAILS: BIRD STYLE



DOMINANT

Do's

- Cut to the chase
- Focus on solutions
- Be brief
- Show a plan to solve the problem

Don'ts

- Provide detailed analysis
- Be evasive
- Include them in emails that aren't relevant



INTERACTIVE

Do's

- Start with a friendly greeting
- Show big picture and vision
- Focus on the positive

Don'ts

- Be abrupt
- Be overly analytical
- Micromanage



CONSCIENTIOUS

Do's

- Be more formal
- Include facts and data
- Be rational and logical

Don'ts

- Be vague
- Start and end with big picture
- Be emotional



SUPPORTIVE

Do's

- Be courteous
- Emphasize impact upon others
- Ask for solutions

Don'ts

- Be abrasive
- Ask for an immediate response (give a time needed)
- Negate the impact on people

SAMPLE EMAIL STRUCTURE

Subject: Project Aristotle Next Steps

Team,

(Eagles) As you know, Project Aristotle is well underway. This project is going to help us bring consistency to how we plan and schedule meetings. I need you to respond to a few questions by following this link by Friday of next week.

(Parrots) This is going to help bring our strategies and people closer together! This has been long underway and now we are ready to start moving key initiatives forward and start getting our employees excited about optimizing their time and resources.

(Doves) This is going to be a change for everyone, and so as we move farther into the implementation of new solutions and sunsetting of others, we will need your support in helping us to think through how to communicate, engage and rally employees to adopt the changes. Your role in this process is going to be critical for the overall success.

(Owls) This project is going to take some time and resources. Phase 1 is underway, and here is what we know:

XXX
XXX
XXX
XXX

Our timeline for completing phase 1 will follow the attached project plan. Please review and make sure you are OK with the proposed dates and steps. Please come to our next meeting ready to discuss the questions answered in the link above and bring any additional items you need clarification on.

Thanks,
Team Aristotle

ABOUT VELOCITY ADVISORY GROUP

Velocity Advisory Group delivers strategic support and development opportunities that senior leaders need to align their teams and lift their organization. Our team brings extensive experience in strategic consulting, executive coaching, and developing talent through intentional culture initiatives and people insight technology. Since 2009, we have been committed to building momentum across organizations by equipping leaders with the tools and intelligence needed to elevate culture, eliminate inefficiencies, and propel strategic action.

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we can help take your organization to the next level.