Two Meeting Cadences for CSU DoIT
Based on *Death by Meeting* (Patrick Lencioni, 2007) and *The Dual Cadence of Leadership Meetings* (Elise Keith, 2017)

### Operational Cadence

**Main Focus:** Problem Solving

**Daily Check-in**

*Daily stand-up, daily huddle*

- **5-10 minutes**
  - Don’t sit down
  - Keep it administrative
  - Don’t cancel even if not all can make it

  **Purpose:** a quick forum for ensuring nothing falls through the cracks
  - Identify obstacles and find help
  - 1 minute/person simply stating key activities for the day

**Weekly Tactical Leadership Team Meeting**

- **45-90 minutes**
  - Don’t set agenda until after initial reports
  - Postpone strategic discussions

  **Purpose:** address tactical issues of immediate concern
  - Priorities for the week (lightning round)
  - Progress review on metrics (no discussion of issues)
  - Real-time agenda based on Priorities and Progress
  - Decide what tactical issues to address to ensure short-term objectives are not in jeopardy
  - Park long-term or strategic issues as (possible) issues for monthly strategic
  - Goal: Resolve tactical issues, remove obstacles, get everyone on the same page

### Strategic Cadence

**Main Focus:** Challenges, Targets, High-level Strategy

**Monthly (or ad hoc) Strategic Meeting**

*(Decision-making meeting)*

- **2-4 hours**
  - Limit to 1 or 2 topics (3 at most)
  - Prepare, do research
  - Engage in good conflict

  **Purpose:** analyze, debate, decide what to do about critical issues that will affect the organization in fundamental ways
  - Assign a lead person for each item: research, prepare
  - Hold members accountable for coming prepared
  - Mine for conflict and engage in unfiltered, productive ideological debate

**Quarterly Strategic Refresh (Retreat)**

- **1-2 days**
  - Get out of the office
  - Focus on work (limit social time)
  - Don’t over-structure or over-burden the schedule

  **Purpose:** step away from daily issues, review the org more holistically
  - Comprehensive strategy review: re-assess strategic direction
  - Team review: assess yourselves & your behaviors as a team, identify tendencies that may not be in the org’s best interest
  - Environmental review: look at what’s going on around you, with an eye to spot trends, opportunities, and threats
  - Team Unity caution: adding even one person who is not a team member, no matter how well-liked or well-informed, can disrupt team unity

**Annual Strategic Planning**

- **1-2 days +**
  - Weeks of gathering input
  - Think big thoughts
  - Paint the grandest visions

  **Purpose:** wrestle visions into a form that can be honed into actions