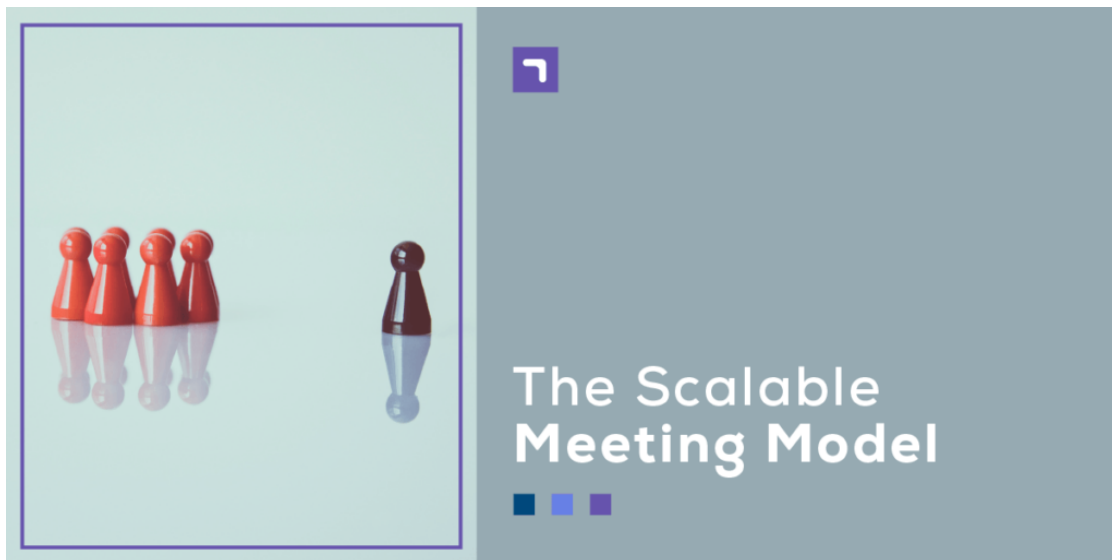


# The Scalable Meeting Model

A Comprehensive Guide To How (and Why) We Run Meetings  
at The Scalable Company

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Running a business is a lot like politics in the sense that it's important to **control the narrative.**

However, this isn't just important externally. Sure your PR/Marketing teams keep everything straight for your customer. But **it's just as important that you keep everyone on your team informed and united internally.**

Without effective team communication, companies...

- Struggle to meet their monthly goals,
- Fail to realize team members are unhappy until it's too late, and
- They see a stifling of creativity and overall growth.

Sufficient to say, **if communication sucks, everyone suffers.**

But, creating an environment of strong communication isn't an easy task. After all, there are many obstacles....

## Nobody Cares

One of the biggest problems entrepreneurs deal with is an overwhelming sense that **"nobody cares as much as I do."**

This feeling often prevents proper communication because it disincentivizes leaders from sharing, out of a fear that the team will just see it as more work rather than an exciting opportunity.

So if you get the same aching feeling, guess what...

**You're right**—they don't, they won't, and they probably shouldn't care as much as you do.

Whether you're an executive at the company or its founder, your employees aren't going to care about the overall mission with the same enthusiasm you do.

**And that's okay!**

Sure it's their job, and I'm sure most of them really like where they work. But, the company wasn't their brain child. It was yours. So, **they will never have as much to benefit from, or as much to lose, as you do.**

However, there is a way to improve your team's enthusiasm and connection to your company.

## Rumors & Politics

No one is immune to the rumor mill.

We all tell ourselves a story based on the data we have, regardless of whether it's the whole picture or not.

So when news drops—say big changes in the company org structure—**assumptions and falsities tend to fill the gaps in your team's knowledge**. And unfortunately, people are usually reluctant to give the benefit of the doubt.

Lack of information always evolves into perceived truths, letting **inter-office politics run rampant**.

So if you want your employees to be happy and confident in the company, you have to nip false information and rumors in the butt **before** they even start.

## Misalignment

KPIs are important for a company. They inform and guide the initiatives behind your vision, mission, and values.

But, **KPIs are especially important for your teams**. People need to understand how their success is being measured. That means there can't be room for misalignment or subjectivity.

Subjectivity is the enemy of growth.

If you're not clear on your expectations lots of things can and will go wrong. If you've ever encountered a scenario where your employee thinks they're doing a great job, but you as the manager thinks they're not (<https://scalable.co/library/how-to-fire-someone-with-fairness-and-dignity/>)... you know how tricky subjectivity can make a situation.

**Misalignment is a failure of leadership, and it needs to be addressed before it wreaks havoc on your team.**

## The Promise

So, how do you prevent misalignment, rumors, and that sinking feeling that your team members will never feel the way you do about your company?

**You institute a cascading communication model that builds commitment and trust.**

By doing this, you're going to see changes in your team's level of commitment. Or at the very least, you'll have a team that reserves the right to tell the worst case story until they've talked to you directly.

This trust will also permeate throughout your company and create stronger bonds between your employees, managers, and peers.

## The Cascading Communication Model



A successful cascading communication model **informs, empowers, and equips** every member of your organization to help the company achieve its goals.

**In order to earn buy-in every employee needs to know...**

1. What role they play,

2. What their purpose is in the overall mission, and
3. That they have an outlet so they are heard

The best way to accomplish this is through meetings.

A consistent meeting schedule allows for information to pass seamlessly and quickly from the leaders, down to the managers, and into the rest of the team.

While there is such a thing as too many meetings, we find that **having a constant meeting schedule forces people to set aside time for the important conversations needed to build trust and commitment.**

Do we always use the full hour? No.

Do we skip meetings entirely if everyone on the team agrees that it's not needed that week? Sometimes.

But, do we *always* have the meeting time blocked out on everyone's calendar? 100%.

**At Scalable, our communication model breaks down into 5 consistent meetings that each vary in their frequency.**

Let's review each meeting now...

## Meeting #1: Quarterly Planning

Our leadership teams meet once a quarter for strategic planning (<https://scalable.co/library/the-scalable-planning-process/>).

At this meeting we set goals, executable steps, and metrics to track success. This meeting is also a place where we sort out any issues that we are facing as a company, or any big news that we want to share.

It's incredibly important that everyone on the leadership team is in agreement before you start sharing information. A united leadership will help spread confidence and prevent confusion.

Once the leadership team decides on the goals and KPI's, it's passed down through the team leaders to the rest of the company for feedback.

Each of the team leaders meets with their direct reports to discuss the plan. This part is essential because it **lets our leadership team get feedback, and also helps to gain buy-in on the plan.**

Once the feedback is all collected, it is reported back to the leadership team, where they then decide the final plan and present it at the "All Hands" Meeting.

(You can learn more about our strategic planning in this article (<https://scalable.co/library/the-scalable-planning-process/>))

## Meeting #2: Monthly Projections

Creating a plan is one thing, but it's important to check in on your progress throughout the quarter.

One meeting at the beginning of a quarter quickly falls out of focus, so we like to get the executive team and the team leads together once a month to check in on our key initiatives and goals.

**The projections meeting is a once a month meeting designed for just that.**

This finance-focused meeting hones in on the goals set at the quarterly planning meeting.

It's where we're going in and asking questions like, *"Where are we at? What have we done in the past month? And what are we going to do next month?"*

The team leaders share any pivots in the Team Scorecard meeting. In some cases, if it's a bigger change that affects multiple teams, it's also announced at the "All Hands" Meeting.

## Meeting #3: Team Scorecard

The leadership team is not the only team responsible for keeping track of the goals.

Departments and Individual teams also keep track of the goals and initiatives that apply to them as well.

**The Team Scorecard Meeting is a weekly meeting that occurs at the department level.**

Team leaders and their direct reports get together once a week and report on 3 important updates:

- **Section #1: Financial Updates** – Basically, this is a budget update. What % of the budget is used, and what's the expectation moving forward.
- **Section #2: Goal & Key Initiative Update** – This is where the teams review the goals and key initiatives. Is the team on track? Are they fulfilling the steps needed to complete goals and initiatives?
- **Section #3: Scorecard By Team/Individual** – This is where the different teams report on their own projects/KPI's. They discuss the status report of projects, ask for any help or support they need to accomplish their tasks, and define their "Big 3" tasks for the rest of the week.

**Typically lasting no more than an hour**, the team meetings are very action-oriented.

No matter how "in the weeds" you get, this meeting should always tie results and projects back to the overall strategy.

**The Team Scorecard Meeting is vital to building trust.** Meeting weekly to get an idea of what each team is working on helps people build empathy, and learn to collaborate to achieve the company goals.

## Meeting #4: Direct Report 1:1's

Once a week, every manager in the company has a 1:1 with their direct reports.

The 1:1 meetings accomplishes a ton:

- **They strengthen relationships:** It's important that every individual feels heard, and has an outlet to talk.
- **They help managers keep a finger on the pulse:** Keeping up with individual team members helps managers know what's getting done, and make sure bandwidth isn't being stretched.
- **They help discover (and prevent) issues:** Rather than ruining a relationship by holding someone's feet to the fire without knowing there is something personal going on, these meetings create space for sharing.
- **They address growth opportunities or performance issues:** There's no better way to keep tabs on performance and identify future leaders than chatting 1:1.

Sufficient to say, 1:1's keep employees and managers happy and knowledgeable.

## Meeting #5: All Hands

The final meeting we hold is the weekly All Hands Meeting.

This meeting is where *everyone* gets together to talk about the company as a whole.

**So, what do meetings look like with the entire company? Well, It depends on the number of team members you have.**

**2 – 10 Team Members:** With 2 – 10 team members, you're updating on goals and objectives. Because your team is small, it's easier to dive into the individual projects. This means you're able to cherry pick important achievements and



updates to share with the entire company. You should also be reporting on the team or individual KPIs for the last week.

**11 – 20 Team Members:** When you get to 11 to 20 people, accountability typically happens on the team, not the individual level. That means you're not getting super in depth on all the different projects. Goal updates tend to move to monthly because when you're that big, your goals are typically a little bit bigger, and there's not a lot of movement from week to week. However, we do recommend that you still report on each team's main KPIs weekly.

**21 – 50+ Team Members:** When you get to 21 to 50 plus team members, it becomes impossible to report on everyone's projects and individual KPIs. At this size, your All Hands Meeting will report on the major company KPI's, rather than the team or individual metrics. When it comes to project reporting, we suggest you ask your team or department leads to pick out 1 or 2 projects each and present a "show and tell." This helps to keep the meeting under an hour.

This meeting is where a lot of the company culture shines through.

At Scalable, there's usually lots of jokes, and even a meme or two. Reporting on the goals is important, but this meeting is also just a place to build community.

We discuss company wide news, such as HR updates, or community aspects like birthdays, anniversaries, and our company step/exercise challenges.

Whether you're a small team or a holding company with multiple business organizations, **it's vitally important that you build a cascading communication model to create an environment built on trust, commitment, and accountability.**

So, test out our meeting model, and adapt it to fit within your own organization.

## About the Author



## Richard Lindner

Richard Lindner is CO-Founder and President of The Scalable Company, DigitalMarkater.com, Recess.io, and a Founding Partner at Scalable Equity, LLC.

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