

GETTING CLEAR & CLOSING THE LOOP

TEAM MEETING GUIDE

This Week is About...

getting clear as a team on how we communicate with different people in different situations so it is always appropriate to the issue at hand.

Why it Matters

Being unsure of how to communicate with someone often leads people to not communicate at all, leaving unanswered questions and loose ends. This can be easily remedied by taking a few minutes to get clear with your team on how to best communicate with people in different situations.

During Your Team Meeting

**Remind everyone to bring their completed Personal Challenge worksheet (Bring a few extra copies just in case.)*

STEP 1. Get started by asking:

- ? After watching this week's video, how many of you feel we already have a pretty clear communication system in place? *(show of hands)*
- ? How many of you think it should be improved?

STEP 2. Complete your Department Communication Matrix:

1. Starting with the first column, discuss with your team the kinds of situations you should communicate with your customers by phone, text, etc. Write your agreements in each quadrant. Continue across with the rest of the columns.
2. Ask everyone to share what they wrote under "Urgent Situations" on their Personal Challenge worksheet.
3. On page 2, discuss and agree on what makes different situations urgent and how they will each be handled. Write your agreements in each box.
4. Make copies of both pages and give one to each person on your team. 📌

PERSONAL CHALLENGE

Think of the situations or information you often need to communicate with teammates and customers. Work your way across the matrix, filling in each box with what kinds of information you would communicate to each person or group using each of the methods on the left, including how quickly you need to communicate each one.

WHO	Customer	Board Member	Our Executive Team	Direct Reports
HOW				
Phone				
Text				
Email				
In Person				

URGENT SITUATIONS:

What constitutes an urgent situation?

Who do you talk to about it?

When do you tell them? 1

How do you tell them? 2

3 4

TEAM CHALLENGE

Complete your Communication Matrix by identifying below what makes a situation urgent you will communicate it out and up.

1. What constitutes an urgent situation?

2. Who do you talk to about it?

3. When do you tell them?

4. How do you tell them?

WHO	Customer	Co-worker	Supervisor	Another Department
HOW				
Phone				
Text				
Email				
In Person				

Session Wrap-up Prompts

- How do you think this new Communication Matrix will help us communicate and handle situations better?
- How do we make sure we consistently follow this matrix going forward?