



Manager Guide

Meeting in a Box: Discussing Change

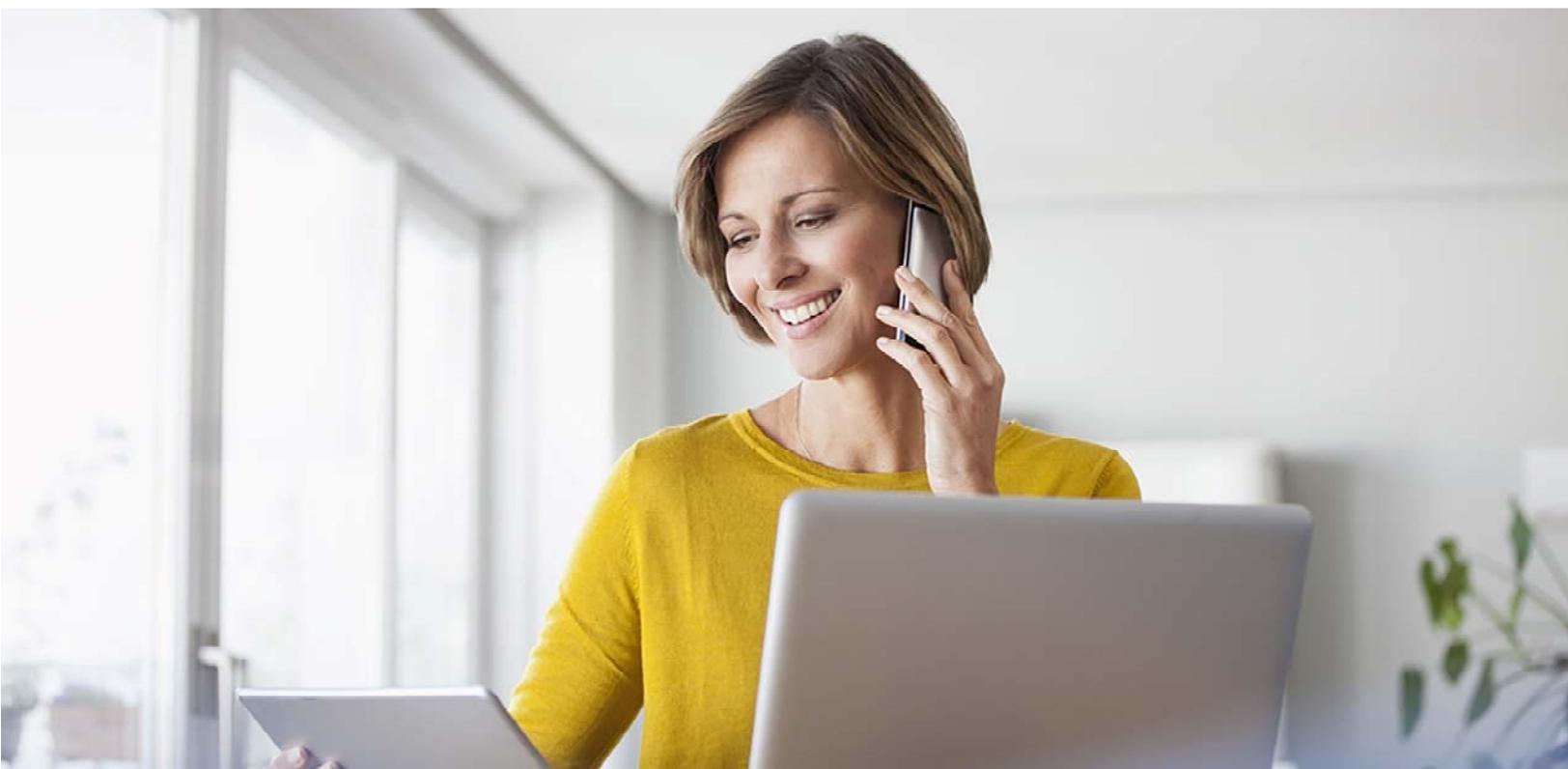




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Meeting Information

Background

The COVID-19 pandemic has forced us to start working very differently, virtually overnight, in a volatile marketplace. As a leader, your immediate focus is on continuity of operations: Is everybody connected? Have I taken care of my client? What about the health of my team? After those hectic first days have passed, there is value in pausing to take stock of what's changed and engaging the team in discussion about what it all means and how to be successful in this new environment.

While the circumstances are extreme, the basics of change management still apply and at its core, this moment is about managing change. The foundational element to any change management effort is to understand and put words to the change. What specifically is different and how will we need to respond? Only when we can articulate where we have come from and where we are going will we understand the work to be done. We may find that little has changed in our core mission, but the ways in which we fulfill that mission must evolve.

This approach is applicable when leaders wish to be mindful of what the change means, assess how it impacts their team, and plan how to move forward together. Without a series of complicated matrices, this meeting approach enables leader reflection; team engagement and dialogue on solutions to enable collaboration; and relevant, positive action.

Duration: 60 minutes meeting with a modest pre-work assignment for the leader and team.

Meeting objective: By considering a core set of questions, shown below, engage your team in understanding the impacts of change and co-create solutions that support success.

Have you:

- Defined the new normal for yourself and for your teams, in words that go beyond “working from home”?
- Explored what's different in partnership with your teams, using the from/to model as your guide?
- Articulated how your expectations will adjust to reflect the current situation?



- Invited your team to share how the new normal might challenge their ability to meet their goals and your expectations?
- Collaborated with your team on solutions that enable goals and expectations to be met for as long as we are in this new normal?
- Set a routine that provides structure for your team while distributed?
- Anticipated the need to monitor individual team members for signs of distress?

The meeting approach is simple and encourages your team to think through this challenging moment in a structured, forward-focused way. The input you receive will give you signals about what to watch for as a leader, while engaging in dialogue that helps your team understand your perspective and share their own views, be clear about goals and expectations at this moment, and co-create constructive steps to adapt to the changed environment.

Before the Meeting

Advance Work for Leaders

- Prepare to share your thoughts on the following questions in two minutes or less as part of your opening comments in the meeting:
 - Put into words what has changed for you as a leader. Go beyond “we’re working remotely.”
 - Think about your expectations for your team. What has changed and what has remained the same?
- Read through this Manager Guide and the PowerPoint Presentation prior to setting up and conducting your meeting.

Logistics and Planning

- Send an email to your team introducing the concept. Attach the template on the final page of this Manager Guide.
 - Instructions for sending the template: Select an area of the template on the final page of this guide. Click on File > Print. Under settings, change the dropdown menu to “Print Current Page.” Rather than choosing a printer, select “Adobe PDF” as the printer option. Click the Print button. This will open only this page (template) as a PDF to send to your team.



- Suggested text for email: During this unusual time, I'd like to bring us together to discuss what the change means, what impact it has for us, and how we can be successful even in this moment of change. Please consider the following questions and capture your answers in the attached template:
 - What's different about this new way of working? Answer in the "Differences" quadrant.
 - What about our "new normal" challenges our ability to meet goals and expectations? Answer in the "Challenges" quadrant.
 - What solutions could help us be successful for as long as we're in this "new normal"? Answer in the "Solutions" quadrant.
 - What could be done at the team level to provide useful structure at this time? Answer in the "Structure" quadrant.
 - What's the one word you'd use to describe this time? Answer in the box in the middle of the template.
 - Please return the template to me by (INSERT DATE) and be ready to share with the team. We will have a group discussion on (INSERT DATE). I look forward to hearing about your experiences over the past few weeks and ideas for how we move ahead.
- Schedule a 60-minute meeting that is convenient for your team.
- Compile team prework input into Slide 7 of the meeting PowerPoint. Highlight themes from their input and use verbatim quotes as much as possible.
- Distribute the meeting PowerPoint prior to the meeting.

During the Meeting

- Welcome and Purpose: Timing 5 minutes
 - Slides 1- 4: Welcome everyone and review the agenda and ground rules.
 - Slide 5: Open by sharing your perspective to the questions.
- Sharing Insights: Timing 30 minutes
 - Slide 6: These are the questions you shared with your team in advance to answer and return prior to the meeting. Revisit as a refresher.



- Slide 7: Display the template summarizing the team’s input and ask your team to share what they submitted – don’t read the slide.
 - Best Practice: Have an assigned order and call on each team member one-by-one to share. This deters several team members from speaking at once.
 - Pay special attention to the word they chose to describe the situation. Listen for signals indicating feeling challenged or distressed.
 - Ask open ended questions and probe your team to get to the meaning (e.g., tell me more about...).
 - Capture actions along the way.
 - Ensure everyone gets a chance to share. If someone has been quiet, call on them and ask for their thoughts.
- Two More Questions: Timing 15 minutes
 - Slide 8: Pose the final questions about structure and support. Use this segment to focus the team on actionable steps within their control. Note that it’s not about changing what we do as a team, but how we do it. This is a time to take notes, because your team is discussing what they need from you for optimal performance.
- Our Commitments: Timing 10 minutes
 - Slide 9: Read back the actions you captured. Review commitments on the slide. Ask if anyone has other commitments they would like to make.

After the Meeting

- Follow up with your team with a written summary of actions and commitments.
- Make note of the words people chose to describe this time. What signals did you note during the meeting? Follow up with your team individually via one-on-one meetings.
- Think about how you will keep in close contact with each individual team member over the weeks and months ahead. Continue to monitor for signs of distress.



Template

