



# PETRA COACH INSPIRE CHANGE

**BEST PRACTICES FOR HOSTING DAILY MEETINGS REMOTELY**



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### LIFE LESSONS for BUSINESS OWNERS

We start our day at 8:33am every morning with a team-wide huddle. Morning huddles held earlier in the day are typically better before the day gets going.

If you work with us, you know that daily huddles, 5-15-minute daily meetings with your team, are key to a healthy and productive organization. These daily communication points are more essential now than ever.

We're relaying our huddle tips in this post and augmenting them specifically to address the disruptive environment we as businesses are all facing in regard to COVID-19.

#### **First, You Need your Technology in Place to Accommodate Video Conferencing**

To facilitate virtual video meetings, we use [Zoom Video conferencing](#). Many of our members use Zoom Gotomeeting, or Google Hangout. You might be saying, couldn't we just do a conference call? You could, but it's better when you can see each other—especially now. There's so much more to communication than just the words you say. Since we're all likely going to be in different places right now, let's at least have the ability to tune into facial expressions and mannerisms when we meet virtually.

As far as a tech platform to capture the meeting structure is concerned, we recommend using a tool like [Align](#) to capture huddle info and organization-wide key performance indicators (KPI's) and priorities.

#### **Leadership to Start Huddle With**

Leadership should start the huddle with any major updates on any COVID-19 and proactive steps to mitigate disruption that day. This is the leader's chance to inform the team and calm the environment while also taking advantage of the opportunity to infuse positivity in the culture during this time of uncertainty.

## Move to the Meat of the Meeting

### What's Up/Need to Know

In this section each team member brings to the valuable lessons learned from yesterday and then what's up for today. Aim to ensure this information is helpful and informative to the team. It's those items that will maintain alignment and help everyone be more productive. This is also a great time to inform team members on client (or member) activity as a result of COVID-19 disruption.

### Top Task for the Day

What's the one thing each person WILL get done today. Most likely this is aligned with work that supports the current state of the business which is heavily focused on COVID-19.

### Tips

- Make the huddles as personable as possible. Call people by names, look for body language and expressions to keep your team engaged even though you're likely meeting virtually.
- Look at adding an additional huddle to your daily rhythm. At Petra we're now meeting once in the morning to start the day, as usual, and then again in the evening to close the the day. The speed of information and changes are happening so fast right now and it's imperative we start and end the day together and on the same page (or screen).
- When/if adding an additional evening huddle, use Align as a central place to just add information into to today's huddle and have team members enter it as information comes available. If this practice is followed, team members can look at the huddle during the day to see up to the minute information that is being shared while being prepared for the huddle that closes the day.
- Establish a task force with takeaway items when an issue or challenge is presented to the group that initiates a lot of questions and dialogue. This is likely a bigger challenge that will require additional time and focus to cover and solve.
- If someone cannot attend your huddle, read the team member's updates (that he or she submits before the meeting) to the team.
- Incorporate some fun into your huddles and meetings. We have members who are meeting virtually for their regular Friday happy hour. We all need some levity during this time and need to keep company culture top of mind as we're all likely separated physically.

# THE PETRA EXPERIENCE

**The Petra Experience is like a Mental Marathon of focused effort to create a specific set of priorities and a planned process to achieve them... as a team.**

## **Looking to change your business life - forever?**

The daily grind of growing a business is tough... it doesn't have to be that way. We work from our own business experiences while focusing on your business – as coach and an accountability partner. We implement the Petra Process in a way that ensures it “sticks” then we stay engaged to keep you on your path to success and less frustration. We don't want this to be just another thing you start – then it gets ignored and finally dies... let's stop that cycle in your business. The Petra Program 'clarifies' what is most important to be done – by whom, by when – **AND** creates an accountability structure to ensure **IT GETS DONE.**

*Marshall Martin is an entrepreneur coach with business coaching firm Petra Coach. Visit our blog at [www.petracoach.com](http://www.petracoach.com) for more business and leadership insight.*

### **PETRA COACH**

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