Cobalt Strategic Meeting Worksheet

Mapping the Meeting Open

No matter what kind of strategic meeting you're planning, the opening session can put you on the path to success or, conversely, kick off the chaos. It's how everyone understands their roles and the rules for engagement. It can open the field for candor and creativity, and demonstrate how participants are capable of thinking differently. In order to do this effectively, consider which of the following (or other) components you want to include and how much time is needed to do them well — then prioritize based on time available.

Icebreaker Should be a quick kickoff to get people interacting with one another and speaking aloud. It can also be helpful for the facilitator to get a sense of personality types for any unknown participants. At the very start of the meeting, it also allows the buffer for late arrivals. **Estimated time:** _____ *(keep under 15 minutes)*	**Introductions** Critical if even one person is new/unknown to the group. Helpful even for familiar teams. Get people thinking beyond titles by asking for just their names, departments if relevant, and what perspective they can contribute beyond their job description. **Estimated time:** _____ *(allow 1-2 minutes per person)*	**Vision/Mission Connection** To inspire and to remind, invite a leader to come and make the connection between the work that is being done now (vision for the meeting) and the big picture of the organization's mission/vision. **Estimated time:** _____ *(consider personality of the leader)*
Rules of Engagement In addition to reminders regarding use of devices and meeting etiquette, this is the time to let people know the expectations of active participation, encouragement of new ideas and empowerment to speak freely. **Estimated time:** _____ *(keep it brief and to the point!)*	**Objectives Review** Do not simply read a slide; this can be a rallying cry when you establish expected results, inspire with the potential impact and reinforce why participants were selected. Make it interactive, invite comments on participants' hopes. **Estimated time:** _____ *(recommend 15 min., minimum)*	**Level-Setting** What baseline knowledge is needed to actively participate? It could be financials, competitive intelligence, industry changes, new offering details. This is **worth the time invested.** It fuels discussion and depth of thinking. **Estimated time:** _____ *(could be an hour, could fill a day)*
Team Build/Creativity Build To get people comfortable with creative thinking. A creative exercise to stretch physical and mental muscles can set the tone for thinking differently before diving into idea generation or problem solving. It can also be a respite after heavy thinking or challenging subjects. **Estimated time:** _____ *(plan for multiple activities throughout the agenda)*	**Free-Form Learning** Reinforce helpful/reference information by bringing it into your environment. Have a poster session in the meeting space or nearby, pre-populate white boards or project slides onto a wall that's visible during breaks. **Estimated time:** _____ *(designated time optional; remind participants to review at breaks)*	**Re-Open, Recap** If your meeting is a multi-day event, schedule time to recap at the end of each day and again the following morning. What have we accomplished, what do we still have ahead of us. Invite participants comments on how they feel it is going. **Estimated time:** _____ *(10-15 minutes at beginning and end, more if open for comments)*

Total Opening Time Estimated: _____

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