

# **Leading Tactical Meetings**



Georgia Leadership Institute  
for School Improvement

**A Performance-based Learning Module  
for Georgia's Educational Leaders**

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# Related Modules

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## Related GLISI Modules

Other modules related to this topic include:

- *Conducting Effective Meetings to Improve Student Achievement and Organizational Effectiveness*
  - *Giving Effective Performance Feedback*
  - *Leading a Team Through Group Decision-making*
  - *Leading a Team to Develop Effective Verbal Skills*
  - *Leading Team Discussions*
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# Performance Objective(s)

Given This...	Do This...	To Meet These Criteria...
<ul style="list-style-type: none"> <li>• A team who needs to:               <ul style="list-style-type: none"> <li>○ Clearly understand the work of each team member during the week</li> <li>○ Hear current reports on the measurement of team goals</li> <li>○ Obtain clarity on issues related to team goals</li> <li>○ Resolve any obstacles impeding the implementation of current goals</li> </ul> </li> <li>• Basic meeting supplies (flip charts &amp; markers, pens &amp; paper, timer, etc.)</li> <li>• Meeting supplies/documents specific to the team or meeting at hand (reports, minutes, agenda, etc.)</li> </ul>	<p>Lead a team through a tactical meeting</p>	<ul style="list-style-type: none"> <li>• The detailed task performance criteria listed in the Performance Checklists in the Topic Practice(s), Final Practice, and Final Assessment</li> <li>• GLISI's criteria for how to work effectively as a team leader/facilitator, listed in the Performance Feedback Form(s) located in the Final Practice and Final Assessment</li> </ul>

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# Module Introduction

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## **Tactical Meetings**

A tactical meeting is a regularly scheduled team meeting that focuses solely on tactical issues related to current organizational goals. (“Tactical issues” will be defined in Topic 1: Getting Started with tactical meetings.)

A weekly staff meeting, an interdisciplinary team meeting, a department chair meeting, or curriculum meetings may function as tactical meetings. The key is that a tactical meeting is relatively brief and is limited to tactical issues that have immediate impact on current team goals.

Tactical meetings are important because they provide teams an opportunity to:

- Fully understand what each team member is working on during the week
- Report on current measurements of work goals
- Clarify issues for team members, and
- Resolve obstacles that may get in the way of implementing current goals

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## **What Is the Leader’s Role?**

- Be prepared with the necessary materials and supplies
  - Schedule and communicate meeting times and locations to participants
  - Thank the participants, acknowledging everyone's worthwhile contribution to the group and commitment to future actions
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**Acknowledgement** This module is based on the work of Patrick Lencioni, who presented the technique for tactical meetings in his book Death by Meeting (2004).

Death By Meeting also describes three other types of meetings: Daily Check-in Meetings, Monthly/Ad Hoc Strategic Meetings, and Quarterly Off-Site Review Meetings. You should read Death by Meeting, and the other Recommended Resources for this module, in order to gain a thorough understanding of all the concepts and lessons learned related to leading effective meetings in general, and leading tactical meetings in particular.

This module complements these books, which provide excellent conceptual information, by providing step-by-step instructions and opportunities to practice that will help you with the task of implementing tactical meetings in your school.

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**Begin With The  
End in Mind**

Research about effective assessment of performance tells us that the learner always performs better when they understand what they should know and be able to do. For this reason, you are encouraged to **review the Final Assessment in its entirety** in order to:

- Understand the knowledge, skills, and behaviors that are being taught and tested in this module
  - Understand the standards (performance criteria) by which your performance will be assessed
  - Gauge your current level of performance against what will be expected of you by the end of the module
  - Prioritize which areas to concentrate on as you work through the module
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# Topic 1: Getting Started with Tactical Meetings

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## Getting Started with Tactical Meetings

A tactical meeting is a regularly scheduled team meeting that focuses solely on tactical issues related to current organizational goals (rather than on strategic issues).

Almost any type of team meeting can be conducted using the tactical meetings technique: A weekly staff meeting, an interdisciplinary team meeting, a department chair meeting, a curriculum meeting, and so on.

Tactical meetings are typically held on a weekly basis (or some other regular, frequent basis). All team members are expected to attend.

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## What Are Tactical Issues, and Why Focus on Them?

Tactical issues are the tasks that are required in order to accomplish the goal or strategic initiative. Tactical tasks are the how something is accomplished - not the what or why it is accomplished.

For example, concepts and skills necessary to achieve math standards are established in the curriculum. During a tactical meeting to determine the scope and sequence for the curriculum, proposing that another skill or concept be added to the curriculum is a strategic rather than tactical issue, and therefore should not be discussed in the tactical meeting.

Keeping strategic topics separate from tactical topics during a tactical meeting promotes clarity and maintains focus on tactical issues related to team goals. Team members are forced to focus on and solve the issues identified on the real-time agenda, rather than dealing with strategic decisions that have already been made.

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## **How Do Tactical Meetings Work?**

Tactical meetings are characterized by:

- Discipline
- Avoidance of discussion of strategic issues
- “Mining for Conflict” via candid discussion and debate
- Structural consistency

Tactical meetings have these four (4) basic components:

1. Lightning rounds
  2. Progress reviews
  3. Real-time agenda, and
  4. Decisions and actions summary
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## **How Do I Do It?**

- Read through the steps in the step-action table (see next page)
  - Study any accompanying examples
  - Complete the practice exercise
  - Share the results with your Performance Coach
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**Step-Action Table**

Step	Action
<p><b>1. Prepare for the tactical meeting introduction session</b></p>	<p>Review the tactical meeting procedures. Prepare charts or posters that describe the components of the tactical meeting.</p> <p>Review the decisions and actions from the previous week’s team meeting. Were there specific actions to be taken? If yes, what were they? Are there progress measures that need to be reported at this tactical meeting? Who do you anticipate will be reporting on these measures? Are there measures you want to make certain are brought up during the progress review portion of the meeting?</p> <p>Premeditate what you will say to:</p> <ul style="list-style-type: none"> <li>• Begin the meeting</li> <li>• Review the purpose of the tactical meeting</li> <li>• Review each tactical meeting component</li> <li>• Review the Tactical Meeting Template (located in Appendix A)</li> <li>• Facilitate each tactical meeting component</li> <li>• Close the meeting</li> </ul>
<p><b>2. Schedule the Meeting and Invite the Participants</b></p>	<p>Plan to spend about 60 – 90 minutes to conduct this introduction session.</p> <p>Make arrangements for when and where the meeting will be held.</p> <p>Invite the participants, communicate the time and place, as well as any materials they are expected to prepare or bring.</p>
<p><b>3. Assemble the materials</b></p>	<p>Prepare sufficient copies of the Tactical Meeting Template for all team members.</p> <p>If you wish, make copies of Topic #1 of this module, to use in training your meeting participants in the new technique.</p> <p>Be certain chart paper, markers, and a timer are available in the room. If not, collect those materials from your classroom, a colleague, the media specialist, your administrator, or from home.</p>
<p><b>4. Open the meeting; Review the purpose</b></p>	<p>Welcome the participants and begin the meeting.</p> <p>Explain that the purpose of tactical meetings is to:</p> <ul style="list-style-type: none"> <li>• review each team member’s weekly activities</li> <li>• to check progress toward team goals, and</li> <li>• to resolve tactical issues and obstacles</li> </ul>

Step	Action
<p><b>5. Define “tactical”</b></p>	<p>Explain that tactical items are the tasks and issues that are:</p> <ul style="list-style-type: none"> <li>• the hands-on part of getting the job done</li> <li>• required in order to accomplish the goal or strategic initiative</li> <li>• the implementation of the team’s goals</li> </ul> <p>Explain that how something is accomplished is a tactical issue. What or why something is accomplished is a strategic issue. Use examples familiar to this audience to enhance your explanation.</p>
<p><b>6. Distribute materials</b></p>	<p>Distribute the meeting template. Use the template and prepared charts and/or handouts as guides for explaining the various components of the tactical meeting. Advise participants to use the template to take their own notes during the course of the meeting.</p>
<p><b>7. Explain the “lightning round”</b></p>	<p>The lightning round is the first part of a tactical meeting. It allows everyone on the team to know quickly and clearly what is going on throughout the team. It may also bring to light issues that need to be discussed in greater detail later in the meeting.</p> <ul style="list-style-type: none"> <li>• They are “round-robin” reports lasting one minute or less per team member.</li> <li>• During this one-minute report, each team member reports on up to 3 activities they will be working on during the upcoming week.</li> <li>• The minute includes time for any follow up questions from other team members.</li> <li>• Team members can keep notes of each member’s report on the meeting template.</li> </ul> <p>Ask for questions regarding this component of the tactical meeting.</p>
<p><b>8. Discuss the concept of the “lightning round”</b></p>	<p>Ask the team to reflect back on their last meeting. What issues from that meeting could have been reported in a lightning round?</p>
<p><b>9. Practice a “lightning round”</b></p>	<p>Assign someone to serve as timekeeper.</p> <p>Direct each team member to deliver a one minute report listing three of their tasks this week. If there is time left over from their report, follow up questions may be asked – but each discussion must end at the one-minute mark.</p> <p>Between each report, or as needed, provide feedback and redirection until the participants are able to meet the criteria for this segment.</p> <p>After the practice, briefly discuss the experience with the participants (how did it work, was it difficult, did you like the brevity, etc.)</p>

Step	Action
<p><b>10. Explain the “progress review”</b></p>	<p>A progress review (also known as a key metrics review) is simply an update on key measurements.</p> <ul style="list-style-type: none"> <li>• Progress review reports are benchmarks or other metrics that measure progress on specific goals or objectives the team is working on.</li> <li>• These are metrics that have been previously established by the team, and are critical to the success of the team.</li> <li>• In addition to being up-to-date on what all team members are engaged in for the week, it is vitally important that the status of measurements remain front and center on the team’s agenda.</li> </ul> <p>Examples of progress review metrics include:</p> <ul style="list-style-type: none"> <li>• How many teaching vacancies have been filled, and how many more need to be filled in order to begin the school year</li> <li>• How much of a curriculum has been completed in relation to the goal by a department or grade level</li> <li>• How many media center books/periodicals have been received, in relation to the date all need to be received</li> <li>• How many students scored at or above the cutoff for a special instructional program area</li> </ul> <p>Generally, about five minutes should be devoted to this portion of the agenda. Only 4 to 6 progress reviews should be reported at one meeting.</p>
<p><b>11. Discuss the concept of the “progress review”</b></p>	<p>Ask the team to reflect back on their last meeting.</p> <ul style="list-style-type: none"> <li>• What progress reports could have been reported at that time?</li> <li>• Were they reported?</li> <li>• Would it have helped your work last week had you been up-to-date on some progress measure?</li> <li>• Would that knowledge have changed your priorities?</li> <li>• What measures do we, as a team, agree are critical to our success? (discussion during progress review will be limited to the metrics/measures the team agrees to track.)</li> </ul>
<p><b>12. Practice a “progress review”</b></p>	<p>Assign a timekeeper and instruct them to monitor for 5 minutes total.</p> <p>Direct participants to deliver a quick report on the metrics/measures that are critical to the success of the team. Limit the reports to 4 – 6 total.</p> <p>Between each report, or as needed, provide feedback and redirection until the participants are able to meet the criteria for this segment.</p> <p>Once the reports are completed, briefly discuss how the process worked for the team.</p>

Step	Action
<p><b>13. Explain the “real time agenda”</b></p>	<p>Explain that a real-time agenda is an agenda that is developed after the lightning round and progress review. An agenda developed in real time deals with the critical topics of the moment, and on those topics/issues that the team agrees are essential in order for work to move forward.</p> <ul style="list-style-type: none"> <li>• A real time agenda contains topics that the team agrees are essential in order for work on tasks related goals to continue, including issues requiring clarity, identification of obstacles, and resolution of obstacles.</li> <li>• Topics for the real time agenda may be generated during the lightning round or progress review, or from other suggestions.</li> <li>• The criteria for picking agenda topics is that they ensure that all team members will be “on the same page” as far as work expectations for the week are concerned.</li> <li>• Sample agenda topics include:               <ul style="list-style-type: none"> <li>○ the need for clarity on an issue</li> <li>○ the resolution of obstacles that are interfering with the accomplishment of goals</li> </ul> </li> </ul> <p>Development of the real-time agenda, and discussion of the topics selected for the agenda, should last approximately 30 minutes.</p>
<p><b>14. Discuss the concept of the “real time agenda”</b></p>	<p>Ask the team to reflect on last week’s agenda.</p> <ul style="list-style-type: none"> <li>• What topics would have been placed on a real time agenda?</li> <li>• Would the topics have been different from the ones that appeared on the agenda? How?</li> <li>• What benefit might a real time agenda have been during the last meeting?</li> </ul>
<p><b>15. Practice creating a “real time” agenda</b></p>	<p>Assign a timekeeper and instruct them to monitor for 30 minutes.</p> <p>Direct participants to suggest topics for the agenda. Once all desired topics are listed, assign priority numbers to indicate the order in which they will be discussed.</p> <p>Once the agenda has been finalized, begin discussing the topics in order of priority. Once 30 minutes has passed, end the agenda discussion.</p> <p>As needed, provide feedback and redirection until the participants are able to meet the criteria for this segment.</p> <p>Ask the team to briefly reflect on and discuss the process.</p>

Step	Action
<p><b>16. Explain the “decisions and actions” component</b></p>	<p>A team member (not necessarily the leader) summarizes the decisions and resulting actions (who, what, when, etc.) of the meeting and writes them on a chart. The team reviews the decisions and actions and agrees with or modifies the summary.</p> <p>Included in this portion of the meeting is the identification of cascading messages. Cascading messages are what decisions, if any, will be communicated to direct reports and by when. This part of the meeting should only take about five minutes.</p> <p>This part of the meeting should only take about five minutes.</p>
<p><b>17. Discuss the concept of the “decisions and actions” component</b></p>	<p>Reflect on your last team meeting:</p> <ul style="list-style-type: none"> <li>• Were decisions and subsequent actions summarized?</li> <li>• Would it have been helpful for them to have been summarized?</li> <li>• How would it have helped?</li> <li>• Were cascading messages identified? Would it have been helpful if they had been identified?</li> <li>• Would cascading messages have avoided duplication of effort during this last work week?</li> </ul>
<p><b>18. Practice a “decisions and actions” discussion</b></p>	<p>Assign a timekeeper and instruct them to monitor for 10 minutes.</p> <p>Direct participants to share decisions that have been made, and the actions that go with them.</p> <p>Between each report, or as needed, provide feedback and redirection until the participants are able to meet the criteria for this segment.</p> <p>After the decisions and actions have been recorded, briefly review and discuss the process with the team.</p>
<p><b>19. Explain and discuss how to handle strategic issues</b></p>	<p>Explain that in order to avoid what Lencioni calls “meeting stew” only tactical issues are discussed at a tactical meeting. If for some reason a strategic issue is raised, it is the responsibility of the team leader to identify it as a strategic issue and write it on the Tactical Meeting Template reserved for potential strategic issues.</p> <ul style="list-style-type: none"> <li>• What issues discussed at the last team meeting might be identified as strategic issues?</li> <li>• How did discussing strategic issues enhance the clarity of the meeting’s agenda? If it did not clarify, explain.</li> </ul>

Step	Action
<p><b>20. Explain and discuss “mining for conflict”</b></p>	<p>Explain that mining for conflict is encouraging open debate and discussion on agenda issues in order that the issues and/or obstacles are openly discussed and resolved. Stress that avoiding the discussion of obstacles or other issues does not promote progress. In fact, failing to discuss them can promote stagnation.</p> <ul style="list-style-type: none"> <li>• Have you ever participated in a meeting where a critical topic was avoided? What were the results of not discussing the issue?</li> <li>• What, if anything, is uncomfortable about discussing topics for which there may not be initial consensus or agreement?</li> <li>• What can we do as a team to facilitate thorough discussion of agenda topics?</li> </ul>
<p><b>21. Check for understanding</b></p>	<p>What are the questions team members may have?          Is the tactical meeting format clear? If not, what are your questions?          Are the purposes of each component clear? If not, what are your questions?          Is the rationale for each component clear? If not, what are your questions?</p>
<p><b>22. Close the meeting</b></p>	<p>Inform the team that at the next meeting the tactical meetings technique will be used.          Advise the team when and how they will hear from you regarding any follow up issues and/or details about the next meeting.          Thank the team for their attendance and participation.</p>
<p><b>23. Complete your Tactical Meeting Template</b></p>	<p>Fill in any parts of your template that you did not complete during the course of the meeting – refer to flip charts and the recorder if necessary.          Keep the completed template as a record of this meeting.</p>

## Practice Exercise

### Instructions

- Follow the steps in the Step-Action Table for this topic
- Complete the Practice Worksheet and the Tactical Meeting Template (Appendix A), listing results that are realistic based on the information in the practice scenario below
- Check your work
- Meet with your Performance Coach to review the results and decide what to do next

### Practice Scenario

The sixth grade teachers of Somewhere Middle School meet weekly to assess where they are on common goals for the school year. In addition to routine activities associated with the operation of the school day, e.g., supervision of intramurals, bus duty, hall duty, seasonal activities, etc., their tactical meeting includes assessing where they are with seventh grade instructional goals.

The team is composed of five teachers. Mrs. Jones teaches language arts and reading, Mr. Smith teaches science, Ms. Brown teaches social studies, and Dr. Bell teaches mathematics. Mrs. Hunt is the teacher of the gifted; her curriculum emphasizes language arts and reading.

One of the sixth grade's primary goals for this school year is the use of rubrics in each of the content areas. Last week's tactical meeting resulted in decisions to:

- Determine the number of students performing at the 1, 2, 3 and 4 level (4-point scale) in language arts, social studies and science
- Organize the language arts, science and social studies data using an excel spreadsheet

As team leader, Dr. Bell anticipates that after examining the data, team members will want to develop strategies that will result in improvement and movement of students from levels 1 to 2, 2 to 3, and 3 to 4.

Given the above scenario, you are to conduct a tactical meeting with the 6th grade team (lightning round, progress measures, tactical agenda items, potential strategic topics, decisions/actions, and cascading messages).

**Practice Worksheet**

*Fill out this part of the Worksheet prior to the meeting, and use it to prepare for the tactical meeting.*

Who will be attending the meeting? List all their names. Place a checkmark next to their names once they have been invited and/or notified of the meeting.

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What decisions were made at the last meeting? What do you anticipate may come up in the lightning round regarding these decisions? List them.

What actions were to be undertaken as a result of the last meeting? List them.

**Practice Worksheet**

What progress measures do you need to hear in the tactical meeting? (If they are not shared at the tactical meeting, ask for them.)

Where will the meeting be held?	What is the time frame of the meeting?

What materials should you assemble to support the meeting process? What office supplies and/or equipment? Put a checkmark next to the items once they have been acquired/assembled.

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**Practice Worksheet**

What will you say to begin the meeting?

What will you say about the purpose of tactical meetings?

How will you define “tactical” vs. “strategic”? What examples can you use from this team’s work (or other school-based examples) to demonstrate the difference?

<u>Tactical</u>	<u>Strategic</u>	<u>Examples</u>

**Practice Worksheet**

List the key points you wish to explain about the <b>lightning round</b> .	List questions you will use to facilitate team discussion/reflection about this element.

List the key points you wish to explain about the <b>progress review</b> .	List questions you will use to facilitate team discussion/reflection about this element.

List the key points you wish to explain about the <b>real time agenda</b> .	List questions you will use to facilitate team discussion/reflection about this element.

**Practice Worksheet**

List the key points you wish to explain about the <b>decisions and actions</b> segment (including <b>cascading messages</b> ).	List questions you will use to facilitate team discussion/reflection about this element.

Plan for how you will <b>handle strategic issues</b> , and how you will describe the plan.	List questions you will use to facilitate team discussion/reflection about this element.

List the key points you will explain about <b>mining for conflict</b> .	List questions you will use to facilitate team discussion/reflection about this element.

**Practice Worksheet**

Plan for how you will close the meeting.

Empty space for writing the plan for how to close the meeting.

**Topic Practice Performance Checklist**

**Select one:**    Performer’s self-assessment    Performance Coach’s observations

**Performer’s Name:** \_\_\_\_\_

**Performance Coach’s Name:** \_\_\_\_\_

**Date of Performance:** \_\_\_\_\_

*Check off each criterion that is observed. If the performance meets criteria with satisfactory quality, mark Yes. If not, mark No and provide feedback (use the back of the page for more space). Enter this performance into your portfolio when **all** items are marked Yes.*

Evidence	Criteria	Proficient? Give Feedback.
1. The leader plans for the meeting	<input type="checkbox"/> The leader uses the Practice Worksheet (or a technique of their own) to premeditate the components of the tactical meeting introduction session	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> The leader communicated the time, location, and scenario to the participants ahead of time	
2. Materials are prepared for the meeting	The leader has assembled materials for the meeting including:	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Timing device	
	<input type="checkbox"/> Flipchart and markers	
	<input type="checkbox"/> One copy of the Tactical Meeting Template for each participant	
	<input type="checkbox"/> Any additional materials as desired/required	
3. An appropriate meeting opening is used	<input type="checkbox"/> The purpose of tactical meetings is described	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> “Tactical” vs. “Strategic” is defined, including examples	
	<input type="checkbox"/> The Tactical Meeting Template is distributed	

Evidence	Criteria	Proficient? Give Feedback.
4. The “lightning round” element is introduced	<ul style="list-style-type: none"> <li><input type="checkbox"/> The leader accurately describes this element</li> <li><input type="checkbox"/> The leader facilitates a reflection discussion about this element</li> <li><input type="checkbox"/> The leader facilitates practice of this element, and re-directs participants to performance</li> </ul> <p>Criteria for lightning round:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> 1 minute per person, including follow up questions</li> <li><input type="checkbox"/> Report includes max of 3 tasks for the week</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Yes</li> <li><input type="checkbox"/> No</li> </ul>
5. The “progress review” element is introduced	<ul style="list-style-type: none"> <li><input type="checkbox"/> The leader accurately describes this element</li> <li><input type="checkbox"/> The leader facilitates a reflection discussion about this element</li> <li><input type="checkbox"/> The leader facilitates practice of this element, and re-directs participants to performance</li> </ul> <p>Criteria for progress review:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Segment lasts 5 minutes total</li> <li><input type="checkbox"/> Discussion is limited to 4 to 6 progress reviews</li> <li><input type="checkbox"/> Reports are limited to metrics/measures focused on team goals</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Yes</li> <li><input type="checkbox"/> No</li> </ul>

Evidence	Criteria	Proficient? Give Feedback.
6. The “real time agenda” is introduced	<input type="checkbox"/> The leader accurately describes this element <input type="checkbox"/> The leader facilitates a reflection discussion about this element <input type="checkbox"/> The leader facilitates practice of this element, and re-directs participants to performance <input type="checkbox"/> Criteria for real time agenda: <input type="checkbox"/> Segment lasts 30 minutes total <input type="checkbox"/> Team agrees on items added to agenda <input type="checkbox"/> Only tactical issues are approved for agenda <input type="checkbox"/> Strategic issues are noted elsewhere, such as a “parking lot” <input type="checkbox"/> Team determines priority order for discussing items <input type="checkbox"/> Once agenda has been set, items are discussed in order	<input type="checkbox"/> Yes <input type="checkbox"/> No
7. “Decisions and actions” is introduced	<input type="checkbox"/> The leader accurately describes this element <input type="checkbox"/> The leader facilitates a reflection discussion about this element <input type="checkbox"/> The leader facilitates practice of this element, and re-directs participants until they get it right <input type="checkbox"/> Criteria for progress review: <input type="checkbox"/> Segment lasts 10 minutes total <input type="checkbox"/> Recorder lists all decisions on a flip chart <input type="checkbox"/> Each decision includes related action, including specifics (who, what, when) <input type="checkbox"/> Cascading messages to direct reports are listed, including by when	<input type="checkbox"/> Yes <input type="checkbox"/> No

Evidence	Criteria	Proficient? Give Feedback.
8. An appropriate meeting close is used	<input type="checkbox"/> The leader accurately explains “mining for conflict” <input type="checkbox"/> The leader checks for understanding, and provides additional information <input type="checkbox"/> The leader informs the team that the next meeting will use the tactical meeting procedure <input type="checkbox"/> The leader describes next steps, including details about next meeting and items for follow-up	<input type="checkbox"/> Yes <input type="checkbox"/> No
9. The leader has a completed Tactical Meeting Template by the end of the meeting	<input type="checkbox"/> All sections of the template have been filled in, reflecting the discussions and results of each segment	<input type="checkbox"/> Yes <input type="checkbox"/> No

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# Topic 2: Leading a Tactical Meeting

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## Leading a Tactical Meeting

In the previous Topic, you learned about tactical meetings. In the Practice, you deepened your knowledge about tactical meetings by (1) explaining it to others, and (2) facilitating each piece of a tactical meeting.

Now you are ready to practice putting the concepts into action by leading a meeting using the tactical meetings technique. In the Final Practice, you will re-convene with the group you facilitated in Topic 1, and lead them through a real tactical meeting. In the Final Assessment, you will work with an entirely new group to both introduce them to the technique and lead them through the process

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## Tip(s)

- Stick with the model and format!
- Resist the temptation to plan the agenda ahead of time.
- Enforce the time limits outlined in the tactical meeting format.

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## How Do I Do It?

- Read through the steps in the step-action table (see next page)
  - Study any accompanying examples
  - Complete the practice exercise
  - Share the results with your Performance Coach
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**Step-Action Table**

Step	Action
<p><b>1. Prepare for the meeting</b></p>	<p>Review the tactical meeting procedures. Prepare charts or posters that describe the components of the tactical meeting.</p> <p>Review the decisions and actions from the previous week’s team meeting. Were there specific actions to be taken? If yes, what were they? Are there progress measures that need to be reported at this tactical meeting? Who do you anticipate will be reporting on these measures? Are there measures you want to make certain are brought up during the progress review portion of the meeting?</p> <p>Prepare any materials that you need for the meeting. You may wish to include a poster or handouts that remind participants about the tactical meeting technique.</p> <p>Prepare one copy of the Tactical Meeting Template for each participant.</p>
<p><b>2. Schedule the meeting and invite the participants</b></p>	<p>Make arrangements for when and where the meeting will be held.</p> <p>Invite the participants, and communicate the time, place, and any materials they should bring. Also include a reminder that this meeting will follow the tactical meetings format they have previously been taught.</p>
<p><b>3. Open the meeting</b></p>	<p>Welcome the participants and begin the meeting. Hand out copies of the Tactical Meeting Template, and advise participants to take notes.</p>
<p><b>4. Review the purpose</b></p>	<p>Explain that the purpose of a tactical meeting is to:</p> <ul style="list-style-type: none"> <li>• Review each team member’s weekly activities</li> <li>• Check progress toward team goals</li> <li>• Resolve tactical issues and obstacles</li> </ul> <p>Describe how you will deal with strategic issues that may come up (such as noting them on a “parking lot” for follow-up outside the meeting or at a later, different type of meeting).</p>
<p><b>5. Outline the process for this meeting</b></p>	<p>Explain the process that will be followed for this tactical meeting:</p> <ol style="list-style-type: none"> <li>1. Lightning round</li> <li>2. Progress Review</li> <li>3. Real Time Agenda</li> <li>4. Decisions and Actions Summary</li> </ol>
<p><b>6. Assign a timekeeper</b></p>	<p>Decide whether you as the leader will serve as timekeeper, or whether you will appoint another member of the team to do so.</p>

Step	Action
<p><b>7. Facilitate the “lightning round”</b></p>	<p>Instruct each participant to give a one minute report listing three tasks they are working on during this week. Remind participants that they may ask follow-up questions, but that this is included in the one-minute time allotment.</p> <p>Remind the timekeeper to announce when each person’s minute is up. Keep the meeting moving through each participant report quickly.</p> <p>Use a “parking lot” to capture (1) strategic issues, and (2) issues that cannot be discussed in the time period allotted, but to which you want to return later in the meeting.</p>
<p><b>8. Facilitate the “progress review”</b></p>	<p>Instruct each participant to give updates on the key metrics or measurements related to their tasks. Remind them to report on those metrics/measurements that are critical to the success of the team, which have been previously agreed upon by the team.</p> <p>Instruct the timekeeper that this segment will take 5 minutes. Keep the meeting moving through these reports quickly.</p> <p>Use the parking lot to capture strategic issues.</p>
<p><b>9. Facilitate the development of a “real time agenda”</b></p>	<p>Inform the team that you will spend the next 30 minutes developing and then discussing a real-time agenda.</p> <p>Ask the members to list items for the agenda. Topics may come from the lightning round and progress report, or may include other issues as requested by team members.</p> <p>Manage the discussion so that only tactical issues (those related to the “what” and “how” of the tasks at hand) are included on the agenda.</p> <p>Capture strategic issues for later discussion/action in the “parking lot.”</p>
<p><b>10. Facilitate the recording of “decisions and actions”</b></p>	<p>Inform the team that you will spend the last 10 minutes recording decisions, actions and cascading messages.</p> <p>Assign a team member to serve as recorder. Inform the timekeeper to begin timing.</p> <p>Ask team members to call out decisions that have been made during the meeting, and the recorder to note them on a flip chart. Next to each decision, write down the actions that will be taken as a result of the decisions (including specific details such as who, what, when, where, how).</p> <p>Conclude the discussion by agreeing on what cascading messages will be communicated to team members’ direct reports, and by when.</p>

<b>Step</b>	<b>Action</b>
<b>11. Close the meeting</b>	Advise the team what will happen next, including such items as: <ul style="list-style-type: none"><li>• Whether written minutes will be shared, and how and by when</li><li>• When the next meeting will be held</li></ul> How you will follow up on strategic items and other outstanding issues Congratulate the team for successfully using the tactical meetings technique. Thank the team for their participation, and close the meeting.
<b>12. Complete your Tactical Meeting Template</b>	Fill in any parts of your template that you did not complete during the course of the meeting – refer to flip charts and the recorder if necessary. Keep the completed template as a record of this meeting.

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# Final Practice

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## Instructions

- Perform this practice, referring to the topic step-action tables as needed.
- Complete the Final Practice Worksheet and Tactical Meeting Template (Appendix A), listing results that are realistic based on the information in the practice scenario.
- Check your work.
- Meet with your Performance Coach to review the results and decide what to do next.
- Completing this Final Practice requires meetings with a team of 2 - 4 peers. Prepare for these meetings by:
  - Communicating the time and location of the meeting to the participants in advance
  - Preparing and providing copies of a meeting agenda
  - Being prepared with all the necessary materials and resources

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## Practice Scenario

Ask the same group of volunteers as in Topic 1 to help you with Final Practice.

Using the decisions and actions developed during Practice #1, (based on the case study involving the 6<sup>th</sup> grade team from Somewhere Middle School), lead this team through their next meeting using the tactical meetings technique.

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## Practice Worksheet

*Fill out this part of the Worksheet prior to the meeting, and use it to prepare for the tactical meeting.*

In addition to your regular team members, will others attend this meeting? List all their names. Place a checkmark next to their names once they have been invited and/or notified of the meeting.

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What decisions were made at the last meeting? What do you anticipate may come up in the lightning round regarding these decisions? List them.

What actions were to be undertaken as a result of the last meeting? List them.

**Practice Worksheet**

What progress measures do you need to hear in the tactical meeting? (If they are not shared at the tactical meeting, ask for them.)

Where will the meeting be held?	What is the time frame of the meeting?

What materials should you assemble to support the meeting process? What office supplies and/or equipment? Put a checkmark next to the items once they have been acquired/assembled.

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**Final Practice Performance Checklist**

Select one:  Performer's self-assessment  Performance Coach's observations

Performer's Name: \_\_\_\_\_

Performance Coach's Name: \_\_\_\_\_

Date of Performance: \_\_\_\_\_

Check off each criterion that is observed. If the performance meets criteria with satisfactory quality, mark Yes. If not, mark No and provide feedback (use the back of the page for more space). Enter this performance into your portfolio when **all** items are marked Yes and **all** Feedback Form (next form) items are marked 3 or 4 (or Not Applicable).

Evidence	Criteria	Proficient? Give Feedback.
1. A Tactical Meeting Template is provided to each team member	<input type="checkbox"/> Provided to participants early in the meeting	<input type="checkbox"/> Yes
	<input type="checkbox"/> Includes six areas for use during tactical meeting	<input type="checkbox"/> No
2. Meeting opening is used	<input type="checkbox"/> Includes a review of the purpose of a tactical meeting	<input type="checkbox"/> Yes
	<input type="checkbox"/> Includes a review of the agenda of a tactical meeting (lighting round, progress review, real-time agenda, decisions/actions)	<input type="checkbox"/> No
3. Lightning round is completed	<input type="checkbox"/> Timekeeper is used	<input type="checkbox"/> Yes
	<input type="checkbox"/> All reports completed within 1 minute each	<input type="checkbox"/> No
	<input type="checkbox"/> All reports described up to 3 tasks	
	<input type="checkbox"/> Only tactical items are allowed	
	<input type="checkbox"/> (what, how related to tasks/goals)	
	<input type="checkbox"/> Follow up questions are allowed, as time allows	
	<input type="checkbox"/> Extra items/issues are noted in parking lot, if appropriate	

Evidence	Criteria	Proficient? Give Feedback.
4. Progress reports are provided	<input type="checkbox"/> Timekeeper is used <input type="checkbox"/> Team members reported on 4 to 6 measures considered critical to the team's success <input type="checkbox"/> Segment is limited to 5 minutes total <input type="checkbox"/> Extra items/issues are noted in parking lot, if appropriate	<input type="checkbox"/> Yes <input type="checkbox"/> No
5. A real time agenda is developed	<input type="checkbox"/> Timekeeper is used <input type="checkbox"/> Agenda is developed during meeting, not before <input type="checkbox"/> Only tactical items are allowed <input type="checkbox"/> (what, how related to tasks/goals) <input type="checkbox"/> Agenda topics are prioritized, then discussed in priority order <input type="checkbox"/> Agenda segment is limited to 30 minutes total <input type="checkbox"/> Strategic issues are noted in parking lot to be discussed at a later time	<input type="checkbox"/> Yes <input type="checkbox"/> No
6. Decisions and actions are documented	<input type="checkbox"/> A timekeeper is used <input type="checkbox"/> A recorder is used <input type="checkbox"/> Decisions are charted <input type="checkbox"/> Actions for each decision are charted (including specifics: who, what, when, where, how) <input type="checkbox"/> Cascading messages to direct reports (including by when) are charted	<input type="checkbox"/> Yes <input type="checkbox"/> No
7. A meeting closing is used	<input type="checkbox"/> "What next" is identified <input type="checkbox"/> Next meeting is planned/communicated <input type="checkbox"/> Follow up actions/target dates are described	<input type="checkbox"/> Yes <input type="checkbox"/> No

Evidence	Criteria	Proficient? Give Feedback.
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8. The leader has a completed Tactical Meeting Template by the end of the meeting

All sections of the template have been filled in, reflecting the discussions and results of each segment

Yes  
 No

**Final Practice Feedback Form (page 1 of 2)**

**Performer's Name:** \_\_\_\_\_

**Performance Coach's Name:** \_\_\_\_\_

**Date of Performance:** \_\_\_\_\_

Use the rubric below to rate **only** the cross-cutting leadership skills on this page (including write-ins). Enter this performance into your portfolio when **all** Performance Checklist (previous form) items are marked Yes and **all** Feedback Form (this form) items are marked 3 or 4 (or Not Applicable).

Performance Levels			
1	2	3	4
<p><b>Emerging</b> Needs Study and Practice <i>Few/none of desired behaviors were adequately displayed.</i></p>	<p><b>Developing</b> Needs Practice <i>Some but not all of the desired behaviors were adequately displayed.</i></p>	<p><b>Proficient</b> Meets Criteria and Expectations <i>All desired behaviors were displayed and performed correctly.</i></p>	<p><b>Distinguished</b> Could be Used as a Model to Teach Others</p>

**Eligible for Portfolio**

How effective was the performer in these Cross-Cutting Skills?		Rating				
1.	<b>Facilitating</b> group interaction and managing participation	1	2	3	4	n/a
2.	<b>Assisting</b> the group to meet task criteria	1	2	3	4	n/a
3.	<b>Modeling</b> appropriate leadership behaviors	1	2	3	4	n/a
4.	<b>Teaching</b> others how to perform the tasks	1	2	3	4	n/a
5.	<b>Presenting</b> information clearly and concisely	1	2	3	4	n/a
6.	<b>Leveraging technology</b> to increase effectiveness	1	2	3	4	n/a
7.	<b>Motivating</b> others to achieve success	1	2	3	4	n/a
8.	<b>Using group processes</b> to achieve desired results	1	2	3	4	n/a
9.	Other:	1	2	3	4	n/a

**Turn the page to provide additional written feedback (required).**

**Final Practice Feedback Form (page 1 of 2)**

**Performer's Name:** \_\_\_\_\_

**Performance Coach's Name:** \_\_\_\_\_

**Date of Performance:** \_\_\_\_\_

If any element was rated less than 3, what needs to be done to score a 3? To score a 4?

What greatest strengths did the leader exhibit through this performance?

What could be done to improve this leader's performance? Include any criteria on the Performance Checklist that were missed. Be specific.

Were there any significant issues that must be rectified (by additional practice and assessment) before entering this evidence into the Portfolio?

# Final Assessment

## When Can I Take the Final Assessment?

Complete the Final Assessment when you are able to sufficiently execute the module’s performance objective(s) according to the:

- Task-related criteria on the Final Assessment Performance Checklist
- Cross-cutting leadership skills on the Performance Feedback Form

When you take the Final Assessment — either as someone who takes it to “test out” of the module or as someone who has worked through the topics and Final Practice — the underlying assumption is that you are a competent, experienced, performer. This means that the Final Assessment does not include any “helps,” such as step-action tables or worksheets.

## When Can I Add the Final Assessment to My Portfolio?

Has your Final Assessment performance met all the criteria on the Final Assessment Performance Checklist and earned at least a 3 on all of the cross-cutting skills on the Final Assessment Feedback Form?

Yes	No
<p>Add these items to your Portfolio and talk to your Performance Coach about next steps:</p> <ul style="list-style-type: none"> <li>• Final Assessment Performance Checklist</li> <li>• Final Assessment Feedback Form</li> <li>• Module Progress Tracker page</li> <li>• Additional artifacts such as documents, slides, video tapes, participant feedback forms, etc.</li> </ul>	<p>Do the following as needed before attempting the Final Assessment again when you are ready:</p> <ul style="list-style-type: none"> <li>• Obtain performance feedback from your Performance Coach</li> <li>• Review relevant topics in the module</li> <li>• Repeat Topic Practices and/or the Final Practice</li> <li>• Pursue additional learning, training and experience</li> </ul>

**Final Assessment  
Instructions**

1. Gain permission from your supervisor, sponsor, or Performance Coach to complete the Final Assessment in a school setting.
  2. Schedule the date, time and location of your session — one that works for you, your Performance Coach, and other participants.
  3. Invite a group of 2 - 4 volunteers to assist you. Ideally, you should invite your real work team. (If you are an aspiring leader, this may be a team that you would lead once you enter the leadership role. For an incumbent leader, it should reflect the team or type of team that you are currently leading.)
  4. Review the following with your Performance Coach:
    - Task-related criteria on the Final Assessment Performance Checklist
    - Cross-cutting leadership skills on the Performance Feedback Form
    - Final Assessment Scenario (on the next page)
  5. Prepare any other materials or information that you and your participants need to have with you on the day of the activity.
  6. Perform the Final Assessment as follows:
    - In a real school or district setting
    - With a team of teachers, staff, or other leaders as appropriate
    - Observed by your Performance Coach
  7. Retain artifacts from your performance (documents, slides, etc.)
  8. Obtain feedback from your Performance Coach about your performance, and discuss next steps.
-

**Final Assessment  
Scenario**

As a leader in your school or district, you need to gain skills in leading tactical meetings. If you do not currently have a real-world opportunity to lead a team meeting, work with your Performance Coach to identify such an opportunity.

Facilitate a “real-world” team meeting (e.g., a regularly scheduled meeting for a team that exists in your school, preferably a team that you currently serve on) using the tactical meeting technique.

Assume that the participants have never used the technique before – therefore, be prepared to provide as much explanation and support as they need to perform the tasks in the meeting. (You are not required to walk them through as complete an explanation/practice session as in Topic 1, unless they need this level of detail in order to successfully complete the technique.)

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**Final Assessment Performance Checklist**

Select one:  Performer's self-assessment  Performance Coach's observations

Performer's Name: \_\_\_\_\_

Performance Coach's Name: \_\_\_\_\_

Date of Performance: \_\_\_\_\_

Check off each criterion that is observed. If the performance meets criteria with satisfactory quality, mark Yes. If not, mark No and provide feedback (use the back of the page for more space). Enter this performance into your portfolio when **all** items are marked Yes and **all** Feedback Form (next form) items are marked 3 or 4 (or Not Applicable).

Evidence	Criteria	Proficient? Give Feedback.
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	<input type="checkbox"/> Includes six areas for use during tactical meeting	
2. Meeting opening is used	<input type="checkbox"/> Includes a review of the purpose of a tactical meeting	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Includes a review of the agenda of a tactical meeting (lighting round, progress review, real-time agenda, decisions/actions)	
3. Lightning round is completed	<input type="checkbox"/> Timekeeper is used	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> All reports completed within 1 minute each	
	<input type="checkbox"/> All reports described up to 3 tasks	
	<input type="checkbox"/> Only tactical items are allowed	
	<input type="checkbox"/> (what, how related to tasks/goals)	
	<input type="checkbox"/> Follow up questions are allowed, as time allows	
	<input type="checkbox"/> Extra items/issues are noted in parking lot, if appropriate	

Evidence	Criteria	Proficient? Give Feedback.
4. Progress reports are provided	<input type="checkbox"/> Timekeeper is used <input type="checkbox"/> Team members reported on 4 to 6 measures considered critical to the team's success <input type="checkbox"/> Segment is limited to 5 minutes total <input type="checkbox"/> Extra items/issues are noted in parking lot, if appropriate	<input type="checkbox"/> Yes <input type="checkbox"/> No
5. A real time agenda is developed	<input type="checkbox"/> Timekeeper is used <input type="checkbox"/> Agenda is developed during meeting, not before <input type="checkbox"/> Only tactical items are allowed <input type="checkbox"/> (what, how related to tasks/goals) <input type="checkbox"/> Agenda topics are prioritized, then discussed in priority order <input type="checkbox"/> Agenda segment is limited to 30 minutes total <input type="checkbox"/> Strategic issues are noted in parking lot to be discussed at a later time	<input type="checkbox"/> Yes <input type="checkbox"/> No
6. Decisions and actions are documented	<input type="checkbox"/> A timekeeper is used <input type="checkbox"/> A recorder is used <input type="checkbox"/> Decisions are charted <input type="checkbox"/> Actions for each decision are charted (including specifics: who, what, when, where, how) <input type="checkbox"/> Cascading messages to direct reports (including by when) are charted	<input type="checkbox"/> Yes <input type="checkbox"/> No
7. A meeting closing is used	<input type="checkbox"/> "What next" is identified <input type="checkbox"/> Next meeting is planned/communicated <input type="checkbox"/> Follow up actions/target dates are described	<input type="checkbox"/> Yes <input type="checkbox"/> No

Evidence	Criteria	Proficient? Give Feedback.
8. The leader has a completed Tactical Meeting Template by the end of the meeting	<input type="checkbox"/> All sections of the template have been filled in, reflecting the discussions and results of each segment	<input type="checkbox"/> Yes <input type="checkbox"/> No

**Final Assessment Feedback Form (page 1 of 2)**

**Performer's Name:** \_\_\_\_\_

**Performance Coach's Name:** \_\_\_\_\_

**Date of Performance:** \_\_\_\_\_

Use the rubric below to rate **only** the cross-cutting leadership skills on this page (including write-ins). Enter this performance into your portfolio when **all** Performance Checklist (previous form) items are marked Yes and **all** Feedback Form (this form) items are marked 3 or 4 (or Not Applicable).

Performance Levels			
1	2	3	4
<b>Emerging</b> Needs Study and Practice <i>Few/none of desired behaviors were adequately displayed.</i>	<b>Developing</b> Needs Practice <i>Some but not all of the desired behaviors were adequately displayed.</i>	<b>Proficient</b> Meets Criteria and Expectations <i>All desired behaviors were displayed and performed correctly.</i>	<b>Distinguished</b> Could be Used as a Model to Teach Others

**Eligible for Portfolio**

How effective was the performer in these Cross-Cutting Skills?		Rating				
1.	<b>Facilitating</b> group interaction and managing participation	1	2	3	4	n/a
2.	<b>Assisting</b> the group to meet task criteria	1	2	3	4	n/a
3.	<b>Modeling</b> appropriate leadership behaviors	1	2	3	4	n/a
4.	<b>Teaching</b> others how to perform the tasks	1	2	3	4	n/a
5.	<b>Presenting</b> information clearly and concisely	1	2	3	4	n/a
6.	<b>Leveraging technology</b> to increase effectiveness	1	2	3	4	n/a
7.	<b>Motivating</b> others to achieve success	1	2	3	4	n/a
8.	<b>Using group processes</b> to achieve desired results	1	2	3	4	n/a
9.	Other:	1	2	3	4	n/a

**Turn the page to provide additional written feedback (required).**

**Final Assessment Feedback Form (page 1 of 2)**

**Performer's Name:** \_\_\_\_\_

**Performance Coach's Name:** \_\_\_\_\_

**Date of Performance:** \_\_\_\_\_

If any element was rated less than 3, what needs to be done to score a 3? To score a 4?

What greatest strengths did the leader exhibit through this performance?

What could be done to improve this leader's performance? Include any criteria on the Performance Checklist that were missed. Be specific.

Were there any significant issues that must be rectified (by additional practice and assessment) before entering this evidence into the Portfolio?

---

# Appendix A: Tactical Meeting Template

*Provide one copy to each participant, for guiding the process and taking notes during the meeting.*

## Lightning Round

## Progress Review

<b>Real-Time Agenda - Tactical Issues</b> (use small column to note priority for discussion)	

<b>Decisions</b>	<b>Actions</b>

<b>Cascading Messages</b>	<b>By When?</b>

**Parking Lot** (for strategic issues and other items for later discussion/follow up)

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# Recommended Reading and Resources

Lencioni, P. (2004). *Death by Meeting*. San Francisco, CA: Jossey-Bass.

Schmoker, M. (2000) *Results: The Key to Continuous School Improvement (2<sup>nd</sup> Edition)*. Alexandria, VA: ASCD.

Schmoker, M. (2001). *The Results Fieldbook: Practical Strategies From Dramatically Improved Schools*. Alexandria, VA: ASCD.

# Acknowledgments

Dr. Debra Harden, Author	Professional Development Director, Georgia School Superintendents Association
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JoAnn Brown	Program Director, Rising Stars, Georgia Leadership Institute for School Improvement
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