



Focused Performance Meetings: Most Powerful Topics Workshop

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Sample Focused Performance Meetings

Product Opportunity Related Topics

- The Five Most Powerful Actions we can personally take to identify the opportunities for _____ (loans, deposits, specific products, etc.)

Service Related Topics

- The Five Most Powerful Actions we can personally take to improve client/member satisfaction

Product Knowledge/Skill Enhancement Related Topics

- The Five Most Powerful Actions we can personally take to improve the conversational knowledge of specialist products (focusing on the benefits)

Other

- The Five Most Powerful Actions we can personally take to improve tickler systems and follow-up



Focused Performance Meeting Tip Sheet

Note: Meetings can be conducted in person or via teleconference.

| STEP | WHAT | HOW |
|---|---|---|
| Before Focused Performance Meeting | | |
| 1. | Select Topic (New or Repeat) | <ul style="list-style-type: none"> • Select a topic that is specific, high impact, and will result in actions to implement immediately. • Select topics that will generate actions directly relevant to the participants. Manager-to-Manager meeting topics must generate leadership/management actions, and Manager-to-Team Member meeting topics must generate frontline actions. • It is not necessary to change the topic each week, but you do need to change the topic frequently enough to maintain enthusiasm and interest. If you do not change the topic, still hold a meeting, but focus on what is working best and refining, perfecting, and/or building on the previous week's actions. • The topic can be chosen by the group or by you. |
| 2. | Announce Topic <ul style="list-style-type: none"> • Assign Pre-work | <ul style="list-style-type: none"> • Provide rationale for the selected topic. • Ask team members to conduct a Big Five on the topic individually and bring their Big Five answers to the meeting. • Conduct your own Big Five on the topic. |
| During the Focused Performance Meeting (15–20 minutes maximum) | | |
| 1. | Introduction <ul style="list-style-type: none"> • 1–2 minutes | <p>Briefly:</p> <ul style="list-style-type: none"> • Make introductory comments, including: <ul style="list-style-type: none"> – Share success stories and acknowledge top performers, if not previously done. – Provide an update of the overall business performance. – Current week's focus and objectives. – State or re-state the topic, providing the rationale for the topic, benefits to clients and team, and how it links to the team's business objectives. |
| 2. | Run Big Five <ul style="list-style-type: none"> • 2–5 minutes | <p>If Pre-work completed, give participants 1 minute to perfect their actions.</p> <p>If Pre-work not completed,</p> <ul style="list-style-type: none"> • Give participants 2–3 minutes to develop their Big Five. <ul style="list-style-type: none"> – In teams or individually |



| STEP | WHAT | HOW |
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| 3. | Debrief <ul style="list-style-type: none"> 2–5 minutes | <ul style="list-style-type: none"> Use Pyramid Technique to collect actions. Ensure actions are specific and can be implemented immediately following the meeting without additional resources. Challenge actions that are “business as usual”; encourage team members to provide incremental actions. Briefly summarize the list as necessary to check for clarity, understanding, and agreement. Gain agreement on prioritizing the team’s top five actions that, if consistently implemented with high quality, would result in the maximum results. <p><u>Voting Method to Quickly Reduce to the Big Five:</u></p> <ul style="list-style-type: none"> Review the list of all answers and ask each person to select (think about) their top one or two, as you review the list. Review the list again and ask each person to indicate if the item was in their top two. In person, ask people to raise their hands to vote. During teleconferences, ask each person to state their name to vote. Quickly count the number of votes and write the number to the right of the item. Review the number of votes and rank the Big Five based on the greatest number of votes received. <p>Note: You may increase the votes to three if you have a large number of actions, but never give more than three votes to get to the top five.</p> |
| 4. | Obtain Commitments “What?” “How Much?” “By When?” <ul style="list-style-type: none"> 3 minutes | <ul style="list-style-type: none"> Get commitments in writing during or immediately after the meeting. <p>Note: It is not essential that the group agree to a specific Big Five for all participants. You can let participants select their specific actions from the group Big Five. (Make sure the group list is limited to agreed actions that actually achieve the objective.)</p> <p>It is better to have a few actions (from the Big Five highest impact) done well than to have all five actions implemented poorly.</p> <p>Remember: Quality X Quantity = Results.</p> |

| STEP | WHAT | HOW |
|--|--|---|
| 5. | Close Meeting <ul style="list-style-type: none"> • 3 minutes | <ul style="list-style-type: none"> • State your personal commitments to contribute to the results. • Ask for questions/check for clarity. • Provide motivational close: <ul style="list-style-type: none"> – Statement of confidence. – Pre-position follow-up and coaching. – Remind them of the value to the clients. – Express sincere appreciation. |
| After Focused Performance Meeting | | |
| 1. | Follow Up | <ul style="list-style-type: none"> • Review commitments. • Within 24–48 hours. • Check to see what results they are achieving. • If actions are not working, find out why, readjust, and provide coaching to achieve success. • Gather and cross-pollinate Proven Best Practices. • Debrief results periodically through the week. • Coach team members. |



Focused Performance Meeting Planning Worksheet

Planning

1. Topic

2. Introductory Comments

Highlight a few of the past week's successes.

Describe the current week's focus and goals.

Explain your rationale for the topic.



3. Big Five Actions

Identify anticipated Big Five actions to be included in the team's ultimate Big Five.

1. _____
2. _____
3. _____
4. _____
5. _____

4. Personal Commitments

List personal actions necessary to achieving the anticipated Weekly Focused Performance Meeting goal.

(Note: This may change at the meeting, based on the group's agreed-upon Big Five.)

5. Closing Comments

Motivational call to action

Leader's follow-up commitments

