

Plan a focused team meeting

A practical workbook for a 25 minute decision meeting

Use this workbook to turn one team problem into a clear decision, a manageable trial and an agreed follow-up. Prepare on page 2, use pages 3 to 5 in the meeting, then review the result on page 6.

Fictional practice case. The people, dates and figures below are illustrative.

An excerpt from the rough notes

“Each Friday, Sam hands five project updates to Priya. Four of the last ten were missing a next action or deadline. We have 25 minutes to choose a fix: a shared sheet or a checklist in chat. No new spending. Try it for two weeks.”

The prepared meeting brief

Decision: Which format will our five-person team use for the project handoffs on 6 and 13 November 2026?

Boundaries: Use an existing tool with no new spending. Allow 30 minutes for setup and two minutes per project update. Keep the wider project process unchanged.

People and dates: Alex chooses after hearing the team. Sam prepares the handoffs; Priya records missing information. Set up on 3 November; review on 17 November.

Success test: At least 9 of 10 project updates include a next action and deadline, within the time allowance. Sam logs preparation time. If fewer than 10 occur, the review can extend the trial rather than draw a firm conclusion.

Your starting point

Use this case or bring a real decision. Prepare two feasible options on page 4 before the meeting. Gather one example of the problem and confirm who can approve the choice.

Define the decision

Complete this page and name two options on page 4 before the group meets. Share both with the people whose input or approval is needed.

The choice we need to make

Finish this sentence: By the end of the meeting, we will choose...

Set the boundaries

What must the choice fit within

Consider time, cost, available tools and how much change the team can absorb.

What is outside this meeting

Bring the right people

Person or role	Contribution needed

Decision owner and how the choice will be made

Name the approver and the method, such as an owner decision after team input.

Ready check: The choice is specific, the boundaries are visible and the decision owner can attend.

Guide the discussion

Keep the decision from page 2 visible. Ask someone to capture the record while you guide the conversation.

Minutes	Focus	Facilitator prompt
0 to 3	Confirm the choice	What are the choice, the limits and the decision rule?
3 to 8	Describe the problem	What happened? What evidence shows the effect on the team?
8 to 18	Compare two options	Use page 4. Which prepared option fits the limits with the fewest unresolved concerns?
18 to 23	Choose a trial	Name the change, the owner, the success test and the review date.
23 to 25	Confirm the record	Use page 5. Read back the decision and ask each owner to confirm their action.

Keep the conversation moving

Hear one benefit and one concern from each person. If an essential fact is missing, assign a check and set a new decision date.

The evidence we need to hear

Capture one concrete example of the problem, not a general impression.

Park for a separate conversation

Record the topic, follow-up owner and date, or explicitly agree no action.

Choose a practical trial

Compare two realistic options against the boundaries on page 2. Keep claims specific and mark assumptions that need checking.

Practice case: Option A is a shared handoff sheet. Option B is a repeatable checklist in the team chat.

Option A

Option B

Question	Option A	Option B
What changes in day-to-day work?		
Expected benefit and evidence or assumption		
Setup effort and ongoing effort		
Main risk or unknown		

Check the deciding factor

What must be true for the preferred option to work

If it is uncertain, name the check and the person who will do it.

Which option best fits the boundaries and why

Record the agreement

Complete the record together. A named owner and a specific date make each next step usable.

Our decision and trial period

Write what will change, where it applies and when the trial starts and ends.

Who will do what

Next action	Owner	Due date

How we will judge the trial

Measure and success threshold

State what you will measure, the current baseline if known and the result you want to see.

Evidence source and person collecting it

Review date: _____ Review lead: _____

Shared record location: _____

Close with a clear handoff

Read the decision aloud. Ask each owner to confirm their action and due date. Agree who will share this record with the team and when.

Review the trial

Bring the agreement from page 5 and the evidence collected during the trial. Decide whether the change is worth keeping.

Trial reviewed: _____ Review date: _____

Compare the result with the plan

Success threshold from page 5	Observed result

Evidence behind the result

Include sample size, dates and examples. Note missing data or an unusual week.

Effort and unexpected effects

What became easier or harder? Was the effort within the agreed boundary?

Make the next decision

Circle one: Keep / Adjust and retry / Stop / Gather more evidence

Reason for the choice and any further evidence needed

Next action	Owner	Due date

If you retry or need more evidence, agree what to collect and a review date. Share the outcome where the original decision was recorded.