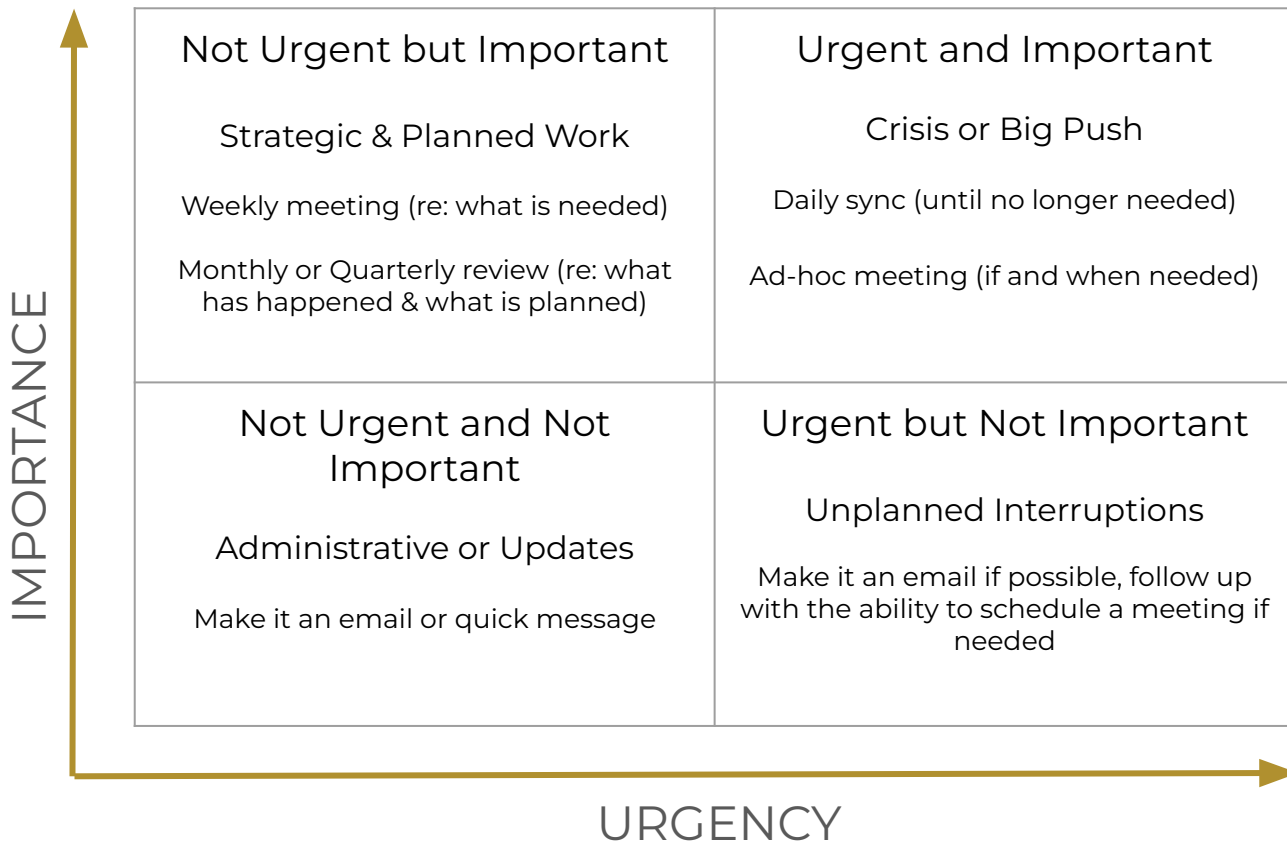


# Meeting Frequency Matrix



# Meeting Types & Purposes

01	Weekly Team Meeting	<ul style="list-style-type: none"><li>• WHO: Leadership and team members/leads</li><li>• WHAT: Metrics review, project/task alignment, and solve current issues</li><li>• WHEN: Every week at the same day/time</li><li>• WHY: Maintain momentum, collaborate, and build relationships</li></ul>
02	Monthly (or Quarterly) Business Review	<ul style="list-style-type: none"><li>• WHO: Entire company</li><li>• WHAT: Review performance outcomes, wins, learnings, and upcoming priorities</li><li>• WHEN: Once a month or quarter</li><li>• WHY: Get everyone on the same page, motivate and engage</li></ul>
03	Quarterly Priority Alignment	<ul style="list-style-type: none"><li>• WHO: Leadership and key team members</li><li>• WHAT: Present large scale priority projects that drive the mission forward</li><li>• WHEN: Before each quarter begins</li><li>• WHY: Align priorities and adjust strategic plan if needed</li></ul>
04	Project Planning / Kick-Off	<ul style="list-style-type: none"><li>• WHO: Team members and leaders involved or need to be informed</li><li>• WHAT: Overview of project goals, timelines, expectations,, and responsibilities</li><li>• WHEN: Depends on urgency, communication, and project management</li><li>• WHY: Game plan how to work in a coordinated way towards a common goal</li></ul>
05	Annual Strategy	<ul style="list-style-type: none"><li>• WHO: Leadership</li><li>• WHAT: Chart a course for the future</li><li>• WHEN: Before the end of the year, may take a dedicated day with no distractions</li><li>• WHY: Set overall strategy and ensure alignment with mission/vision/values</li></ul>

Weekly Meeting Template

Annual Plan Template

# The Communication Matrix: When to Use What Medium

	Text	Slack / DM	Email	Phone	In-Person/Video
<b>Catching Up / Quick Question</b>	●	●	●	●	●
<b>*Giving Praise</b>	●	●	●	●	●
<b>Assigning a Project / Task</b>	●	●	●	●	●
<b>† Setting Expectations</b>	●	●	●	● (w/ a follow-up email)	● (w/ a follow-up email)
<b>† Sharing Changes</b> (team, roles, company, etc.)	●	●	●	● (w/ a follow-up email)	● (w/ a follow-up email)
<b>† Resolving Conflict</b>	●	●	●	● (w/ a follow-up email)	● (w/ a follow-up email)
<b>† Giving Correction</b>	●	●	●	● (w/ a follow-up email)	● (w/ a follow-up email)

\* Some are energised more with **private** praise; others more so with **public** praise. Know their individual preferences.

† Key messages require multiple mediums & repetition; in-person **first**, then follow-up with email to reinforce & avoid confusion.