

TACTICAL MEETING

SURFACE DATA

1

CHECK-IN

One at a time. Call out distractions, get present. No discussion.

2

CHECKLIST REVIEW

Facilitator reads checklist of recurring actions; participants respond "check" or "no check" to each for the preceding period (e.g. prior week).

3

METRICS REVIEW

Each role assigned a metric reports on it briefly, highlighting the latest data.

4

PROJECT UPDATES

The Facilitator reads each project and asks: "Any updates?" The project owner either responds "no updates" or shares what's changed since the last meeting. Clarifying questions allowed, but no discussion.

5

BUILD AGENDA

Build agenda of tensions to process. One or two words per item.

6

TRIAGE TENSIONS

To Process Each Agenda Item:

A

Facilitator asks:
"What do you need?"

B

Agenda item
owner engages
others as-needed

C

Capture any
accepted next-
actions or projects

D

Facilitator asks:
"Did you get what
you need?"

7

CLOSING ROUND

Each person can share a closing reflection. No discussion.



5 PATHWAYS

“What Do You Need?”

You may need more than one to address a tension.



REQUEST A NEXT-ACTION

A “Next-Action” is a single physical, visible act that moves something forward.



REQUEST AN OUTCOME/PROJECT

A “Project” is any multi-step outcome with a definite endpoint.



REQUEST INFORMATION/HELP

Ask for data, opinions, or ideas, to help you get clarity.



REQUEST SPACE TO SHARE

Announce or share anything you need the Circle to know.



REQUEST AN ONGOING EXPECTATION

Expectations can only be set in Governance meetings. Capture an output to take the tension to a Governance meeting.