

Leading Ways: LEVEL SET MEETINGS

Anytime we begin a new working relationship with a team, project group, organization, or even individual, it is very helpful to make time for a Level Set Meeting. The purpose of this type of meeting is to better understand our co-workers and co-leaders, as well as ourselves, in a focused conversation that allows for time to share how each member views the goals, likes to work, and how they engage with others. We may think that we know the answers to many, if not all, of these concerns, but mostly we know what we think or believe and haven't a clue as to how the other person or group actually feels and there is likely to be differences in how these qualities are understood and valued. This meeting is time that can be used to decide how these differences will be resolved, balanced, managed or accepted.

Like any meeting this discussion should be carried out in a [safe](#) supportive environment which encourages the full participation of everyone and reduces hierarchy as much as possible.

Some of these differences may lead to hard conversations but it is assured that if the conversations are left to later when the emotions have been triggered, they will be much more challenging.

The list below are items that might be included in such a meeting. While the list is most likely too long for a single session, one good way to start building a solid working relationship is to decide together which ones should be discussed and which ones delayed for later.

AGENDA ITEMS FOR LEVEL SET MEETINGS:

DIRECTION

- How do each of you see the goals of this work?
- What is the shared, if any, sense of the purpose of this work?
- How does the work fit into the larger strategy and goals of our unit, division or company?

ROLES

- What are our various roles and responsibilities as best we know as we begin?
- If these roles need to change how will we make these changes together?
- If "role creep" becomes an issue for any of us what is the best way to raise the issue?

STYLE

- How do our working and leadership styles fit with others?
- Some style considerations are:
 - Big picture or details
 - Active group engagement or solo work

- Decide today or wait for more information
- Logic focused and analytical or human centric and values oriented
- Terse or expansive
- Cooperative or competitive

COMMUNICATION

- How do we want to communicate? Key issues are frequency, medium, subject, inclusion.
- When feedback is needed, what are the expectations and rules for giving and receiving it?

CONFLICT

- What are our obligations to raise and address conflict between each other?
- How will conflicts be resolved?
- If I have an issue with a team member, what can you expect from me in terms of raising and resolving this?

DECISIONS

- How will different types of decisions be made?
- Will we make all of them within the team?
- If not, which ones will include others and how does the whole team stay engaged and informed in this process?

GROWTH

- What does each individual want from the project in terms of professional growth, development, opportunity, recognition and/or advancement?

There are of course many other subject areas for this on-going discussion and each of those above could have many more considerations added. The point here is to:

1. Get the conversation started.
2. Recognize that people have different approaches to work and life.
3. Normalize the process whereby a resolution of how “we” will work.
4. Expect some on-going tension, but also a process for resolving it.
5. Build stronger relationships through shared understanding.

Time spent on a level set conversation will be repaid many times over through reducing miscommunication, building trust, improving understanding of goals and direction, dealing with issues in an open straightforward way and building more commitment to the work and each other.