

WILY MANAGER

*Just-in-Time
Management
Advice*

Skip Level Meetings



This is one of a series of booklets available at www.wilymanager.com

Skip level meetings are meetings between managers and team members who are one or more levels below them. The purpose of a skip-level meeting is for managers to get to know their team members, build trust with them, and understand their problems. Skip-level meetings can never take the place of direct communications within teams, but it can be a powerful adjunct to these efforts.

Skip level meetings can be done a number of ways. Two common methods are:

- One on one
- Round table (group meeting of team members of a direct report)

Contents:

	What are Skip Level Meetings?	1
	Round Table Meetings:	2
	▪ Why conduct one	
	▪ Who's responsible	
	▪ How they work	
	The Wily Manager 5-Step Skip Level Meeting Process	3
	Critical Cautions About Skip Level Meetings	6
	Related Topic Bundles and Wily Manager Picks	7
	Tools and Resources	8

This document focuses mostly on the *round table* format because it allows you to connect with more people more quickly. For additional information on one on one meetings, please see the [Related Topic Bundles](#) section of this document.

Introduction to Round Tables

Numerous studies support the idea that there is a definite link between employee satisfaction and customer satisfaction, productivity, and financial results. More obvious might be the link between satisfaction and turnover. From both an employee and organizational perspective, job satisfaction is essential.

Why conduct a Round Table Meeting?

A round table is not just a meeting, it is a process designed to provide the opportunity to problem solve with your associates to build healthy workplaces and strong leaders who have credibility and trust with their teams.



There is a definite link between employee satisfaction and customer satisfaction, productivity, and financial results



Who is responsible for Round Tables?

The individual leader is ultimately accountable for Round Table Meetings. In many organizations, the HR group will be able to provide help, advice or tools to ensure they are done well.

How does a Round Table work?

The key to achieving the round table objectives is **process**. The method of gathering the feedback, creating action plans and following up with participants is the most critical factor in whether or not the objectives are met and to what extent they are achieved.



The Wily Manager Five Step Round Table Process

1. Plan the meeting
2. Conduct the meeting and record the feedback
3. Analyze the information collected
4. Action plan on the feedback
5. Follow up and report progress

Step 1 – Plan the Meeting

The first step will be to prioritize which work groups you will target for a round table meeting. In prioritizing your target groups consider the following characteristics:

- Groups from whom you have evidence (via 360 or employee engagement surveys) of things that you may want to investigate further
- Groups from which we have received informal feedback which we would like to investigate further
- Group with a new leader in position
- Length of time since the last round table was conducted

Once the priority lists have been developed, you will want to schedule the meeting. See Appendix C for a [Sample Skip Level Meeting Invitation Letter](#). Don't forget to consider reaching out to the HR group for additional help or support. Leading organizations schedule regular skip level meetings on an annual basis.

Step 2 – Conduct the Meeting and Record the Feedback

It is recommended two individuals conduct the round table meeting, so that one can focus on conducting the meeting and the other can properly document what is learned.

If you can provide an answer to a particular question or concern during the meeting, do so. Creating action plans and following up can be time consuming so provide direct answers during the meeting whenever possible.

During the meeting don't make judgments about what to record or not record. Try and write down as much of the feedback as you can, and analyze it later to determine what to do about the comments collected.

Draft Meeting Agenda

- ✓ Introductions
- ✓ Meeting purpose/Confidentiality Statement
- ✓ Review actions since last meeting
- ✓ Round table questions
- ✓ Next steps
- ✓ Close/Thank You

A [Skip Level Meeting Discussion Guide](#), which follows this agenda, is included in Appendix E. As you are asking questions and listening to the responses, be sure to ask follow up questions to clarify an issue or gather more specific facts. As well, use follow up questions that are actionable in nature and that suggest specific actions the company can take if employees are dissatisfied in that particular area.

Related Wily Manager Topic Bundles

Effective Meetings

The One on One Meeting

Visit

www.wilymanager.com
to get cheat sheets about
these topics

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Avoid asking employees for feedback on issues that cannot be changed or improved. For example, when asked if they are satisfied with their salaries, most employees will indicate that they are not. If you choose to ask employees for feedback regarding their salaries, you must be prepared either to raise salaries or to explain to employees in a formal manner why you are unable to address the issue. This doesn't mean it won't come up but this is an example of a topic you may choose not to bring up yourself.

See some [Suggested Skip Level Meeting Questions](#) in Appendix F.

Step 3 – Analyze the Information Collected

- Connect with the other person taking notes in your meeting, and arrive at an “official version” of your notes for debrief.
- For each item, determine whether this is something that requires follow up or action planning.
- For each item determine whether this is something that should be followed up on individually or whether this was a group concern that should be addressed via the round table follow up process.

Within 1 week of the round table meeting, send out a follow up letter with the notes from the meeting to the participants, asking for any additions that need to be added to the list. [Sample Skip Level Meeting Follow-up Letters](#) are included in Appendix D. You'll also want to review the feedback

with the front-line manager(s) responsible for the round table participants.

Step 4 – Action Planning

- Take an initial cut at the action planning process by determining which items can easily be actioned; require simple answers, or information you committed to providing during the meeting.
- Other items might require more in depth action planning, perhaps involving other people or other resources. Whenever possible involve the round table participants in “action teams to improve”.
- Work with those other resources to complete the action planning tool ensuring that each concern has an action plan an owner and a due date.
- Within 1 month of the round table meeting send out the Action planning tool again, this time with all actions and due dates filled in.
- Ensure that actions planned and communicated are achievable. To over-promise and under-deliver is even more destructive than doing nothing at all.

Step 5 – Report Progress

This is perhaps the most important step in the process. If actions are not followed up on, mistrust and cynicism can easily fester, leaving participants with the impression that ‘nothing ever happens as a result of these meetings’.

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- Continue to update and send out the action planning document every month after the meeting.
- The expectation would be that at 6 months 99% of the actions would have been completed (unless otherwise noted on the Action Planning Tool).

Critical Cautions About Skip Level Meetings

- Skip Level meetings can be dangerous if they are used or perceived to be used in order to build a file on a manager for applying negative consequences.
- Tell all managers what you are doing and why, preferably at your team meeting (the purpose is communication and feedback for improvement, not to find fault with a particular manager)
- Do skip levels meetings with all of your direct reports' teams – not just one (it's not a witch-hunt if you do them with all teams).
- Don't include the manager in the meeting if your goal is to get back honest feedback. Again make sure this is set up effectively.
- Don't ask about topics about which you plan to do nothing. For example, don't ask about their satisfaction with pay and benefits if you don't plan on at least being open to looking at it.
- Provide some level of feedback to the manager about the feedback received from his/her direct reports, but maintain confidentiality, and certainly don't name names.
- Beware that if skip level meetings are not executed well, they will do far more harm than good, so any leaders should be prepared to invest the time and effort to do them well, or should not bother doing them at all.



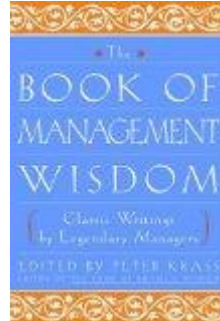
Related Topic Bundles

[Effective Meetings](#)

[The One on One Meeting](#)

Wily Manager Picks

[The Book of Management Wisdom: Classic Writings by Legendary Managers](#)
(Peter Krass)



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Appendix: Tools and Resources

- A. [Skip Level Meeting Readiness Self-Assessment](#)
- B. [Skip-Level Meeting Communication Timeline](#)
- C. [Sample Skip Level Meeting Invitation Letter](#)
- D. [Sample Skip Level Meeting Follow-up Letters \(2\)](#)
- E. [Skip Level Meeting Discussion Guide](#)
- F. [Suggested Skip Level Meeting Questions](#)
- G. [Where to Get More Information](#)

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Appendix A

Skip Level Meeting Readiness Assessment

	<i>Ask Yourself These Questions:</i>	<i>If the Answer is NO...</i>
A	Has a skip-level meeting occurred with this group before?	Go to 1
B	Has the feedback been acted upon?	Go to 2
C	Is the leader of the group to be interviewed a good performer?	Go to 3
D	Have skip-level meetings occurred with parallel teams or work groups?	Ensure this group is your priority
E	Is there someone who can accompany whoever will be conducting the meeting?	Appoint a note taker so you can focus on the meeting
F	Is there a prepared question set for whoever is conducting the meeting?	See Appendix F for Suggested Skip Level Meeting Questions
G	Is there organizational history of giving and receiving constructive feedback?	Go to 4
H	Do you anticipate the participants will readily offer their views?	Go to 4
I	Are you sure it is better to conduct this meeting in a group setting as opposed to a series of one on ones?	Go to 5

1. You need to:
 - Determine why you are targeting this group, and make sure it is for constructive reasons
 - Ensure you understand and have prepared for the entire process. Read all the information contained in the module very carefully
 - Be committed to acting on the feedback provided
2. You need to review the notes from the previous meeting and take some action against the feedback provided before you ask for more feedback. Failure to do so will create great cynicism. Review the 'Action Planning' Topic Bundle
3. Do not conduct the meeting to build a case against a manager with performance issues. Doing so will create distrust against senior levels of leadership. Review the 'Dealing with Performance Issues' Topic Bundle
4. Review the 'Getting Good Information from Others' Topic Bundle. Consider doing some development work on building a culture of feedback. Review the '[Giving Quality Feedback](#)' Topic Bundle
5. Review '[The One on One Meeting](#)' Topic Bundle

Appendix B

Skip Level Meeting Communication Timeline

Action	When?
Plan and build round table schedule	
Send out an invitation to round table participants	2 weeks in advance
Hold round table meeting	
Send out 1 st follow up to participants with feedback or issues requiring action planning	No later than 1 week after
Send out 2 nd follow up to participants with action plans, owners and due dates determined	No later than 4 weeks after
Send out 3 rd follow up to participants with progress on action plans	No later than 3 months after
Send out final follow up to participants with progress on action plans	No later than 6 months after
Review Action plans again at the beginning of the next round table meeting	

Appendix C

Sample Skip Level Meeting Invitation Letter

I would like to take this opportunity to invite **(insert invitees)** to a round table discussion on **(insert date)**. The meeting will take place **(insert location)** and is scheduled **from (insert time)** to **(insert finish time)**.

Part of our focus is to build healthy workplaces, strong leaders who have credibility and trust with their teams, as well as the ability to problem solve with our associates, enabling them to build their businesses and their careers. The round table discussion provides a forum for us to gather feedback and ideas from our front-line teams, information that will support us as we work toward these goals.

In preparation for next week's meeting, think about some of the things you think the leadership team is doing well and some things you think we need improve; what do you like or not like about working at **Company Name**; how can we make it better? In order to ensure that we get honest feedback, all your comments and suggestions will be handled in a confidential manner. I look forward to hearing your ideas.

Sincerely,

(insert Name, Title)

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Appendix D

Sample Skip Level Meeting Follow-up Letters

Sample One Week Follow Up Letter

Hello everybody – As promised here is some follow up from our Round Table discussion.

Part of our focus is to build healthy workplaces, strong leaders who have credibility and trust with their teams, as well as the ability to problem solve with our associates, enabling them to build their businesses and their careers. Your feedback during Round Table discussions helps us as we work toward this part of our strategy.

The following table outlines some of the key themes of our discussion. Some of the issues raised were more individual concerns and did not pertain to the balance of the group. These individual concerns will be followed up on individually rather than in this context.

Our next step is to review the issues and finalize action plans and timing. After action plans have been finalized I will continue to communicate our progress over the coming months. I realize the list is not representative of everything we talked about so please feel free to contact me directly if you have any questions, additional insight, or concerns you would like to make sure are added to this list.

Once again thank you for your valuable feedback, we appreciate your time and commitment to making **Company Name** a better place to work.

Sincerely,

(insert Name, Title)

Sample 3 and 6 Month Follow Up Letter

Hello everybody – I wanted to provide you with the 3 month update from our Round Table discussion on **(insert date round table was held)**.

The attached table outlines some of the key themes of our discussion as well as some of the work that is currently being done based on your feedback. If you have any questions or wish to provide further feedback, please feel free to contact me directly.

Part of our focus is to build healthy workplaces, strong leaders who have credibility and trust with their teams, as well as the ability to problem solve with our associates, enabling them to build their businesses and their careers. Your valuable feedback during Round Table discussions helps us as we work toward this part of our strategy.

Once again thank you for your valuable feedback during these sessions, we appreciate your time and commitment to making **Company Name** a better place to work.

Sincerely,

(insert Name, Title)

Appendix E

Skip Level Meeting Discussion Guide

Introductions

If this is a team with which you may have had limited interaction with it is suggested that you provide an opportunity for everyone to introduce themselves.

Meeting Purpose

In your own words cover off the following details:

- A Round Table meeting is a process through which we are able to gather feedback, ideas and opinions from our front-line employees.
- I would prefer to focus on local issues that the local teams can address. We can certainly talk about higher level issues but I would like us to try and focus on things that we have local ownership and control of.
- Not only would I like to hear about your concerns but I would also like to hear your ideas for solving those issues.
- In order for this type of meeting to be effective you need to feel comfortable speaking with truth and candor. So we need to respect a certain level of confidentiality with the comments and discussion that takes place. I will certainly do my part and handle the information you share appropriately but I think we also need to recognize and respect each others confidentiality.

Review Actions Since the Last Meeting

If available at this point you should review the issues and actions from the previous meeting. This adds credibility to the process (work did get done) and it also will help you avoid repeating discussions that were addressed last time.

Next Steps

In your own words cover off the following details:

- You will receive a summary of our discussion within the next 10 days
- About 4 weeks from now you will receive a document that outlines the specific action plans to address the feedback you shared today
- We will then follow up with you at about 3 and 6 months regarding the progress against those action plans.
- What questions do you have?

Close/Thank You

In your own words cover off the following details:

- I want to end by thanking you for openly sharing your thoughts and ideas with us today
- If there are concerns that you did not bring up today please feel free to call me directly

Appendix F

Suggested Skip Level Meeting Questions

Manager Quality

- What is your manager doing well? Why is that important to you?
- What would you like your manager to start doing that he/she is not doing currently? Continue doing? Stop doing? Why is that?
- How effective are your 1:1's and Team Meetings – what is one thing your manager could do to improve them?
- What other issues/comments do you have about the management at **Company Name**?

Work Environment

- What are some operational/work place issues (i.e. facilities, equipment, etc.) that exist for this group?

Company

- What do you like the most about working for **Company Name**?
- What do you like least? If you owned the company what would you do about that?
- Why do you think people choose to leave the organization? What could we do to change that?

Miscellaneous

- What have we not covered that you were hoping to talk about?

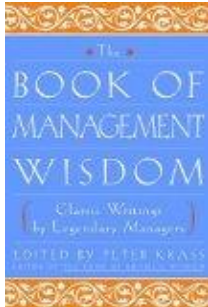
Summary

- What should my top 3 “take aways” from this meeting be?

Appendix G

Where to Get More Information

Books:



[The Book of Management Wisdom: Classic Writings by Legendary Managers](#) (Peter Krass)

“The Book of Management Wisdom brings together the essays and speeches of more than fifty of the most successful business managers of all time and presents their ideas, tips, and management secrets in their own words. Drawing on their personal experiences, these world-class managers offer a range of practical advice, case studies, humorous anecdotes, and management philosophy. You’ll hear from Sam Walton on creating a corporate culture, Lee Iacocca on his famous skip meetings, and Michael Dell on his “campaign of internal evangelism.”

Articles:

[Skip-level meetings can ease restructuring](#) (Robert J. Inguagiato) – HR Magazine, June 1994

[How to subvert hierarchy: CEOs must skip levels to manage more effectively](#) (Michael J. Critelli) – The Chief Executive, Jan/Feb 2004

Websites:

[How to Conduct a Skip Level Meeting](#) (www.eHow.com)