

Holacracy Tactical Meeting Process

Check-in Round

Goal: Notice what's got your attention, call it out, let it go.

Sacred space. No cross talk. Fundamental grounding for the meeting.
Space to get present, here and now.

Administrative Concerns

Goal: Clarify time and logistics allocated for the meeting.

Administrative clarity around meeting end time, logistics, breaks, etc.

Checklist Review

Goal: Bring transparency to recurring actions.

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

Metrics Review

Goal: Build a picture of current reality.

Each role that is assigned a metric briefly reports current data.
Answering the question: Where are we now?

Project Updates

Goal: Report updates to key projects of the circle.

The Facilitator reads each project on the circle's project board and asks: "Any updates?"
The project's owner either responds "no updates" or shares what has changed since the last meeting. Questions allowed, but no discussion. No general status reports, just updates. Only read out projects of those in attendance. When Project Updates are completed ask each circle member "any projects to add at this time?"

Agenda Building

Goal: Build an agenda with placeholder headlines.

Build agenda of tensions to process; one or two words per item, no discussion.

Triage Issues

Goal: Process all agenda items in the allotted time.

To Resolve Each Agenda Item:

1. Facilitator asks: What do you need to resolve your tension?
2. Agenda item owner engages others as-needed.
3. Capture any next-actions or projects requested & accepted.
4. Facilitator asks: "Did you get what you need?"

Optional: The tension holder may request an open discussion or a reaction round. Or the facilitator may ask if the tension holder would like either of those options.

Closing Round

Goal: Harvest the learning from the meeting.

Each person may share a closing reflection about the meeting; No discussion.