

TruMethods Peer

QUARTER-AT-A-GLANCE



UPCOMING EVENTS

APRIL 2024 QUARTERLY MEETING

Renaissance Orlando at SeaWorld®
6677 Sea Harbor Drive - Orlando, FL 32821
Monday, April 22nd – Wednesday, April 24th

[Register Here](#)

Pre-Day – Monday, April 22nd, 1 pm ET
Main Day 1 – Tuesday, April 23rd
Main Day 2 – Wednesday, April 24th

FRIDAY FUN DAYS

Friday Fun Days are bonus resources to provide additional guidance, insights, and training for our Peer Community.
Fridays, 12 pm – 1 pm ET

Bonus: Peer Quarterly Meeting Prep Workshop
Friday, April 5th, 12 pm ET

Stanley Study Sessions

Educate Members on how SMART Numbers relates to the framework. Starting with the Picanomics targets.

Friday, March 8th – *What is the NRR/MRR Ratio?*

Office Hours

Provides a space for our leaders to provide insights, updates, nuggets, and other applicable information to members. Additionally, gives members the opportunity to ask questions and seek guidance from our coaches.

Friday, March 15th
Friday, March 29th

SMART Numbers Live!

Members are able to gain perspective on how SMART Numbers tells a story using a volunteer peer as a real-world example.

Friday, March 1st
Friday, March 22nd

CAPTAINS CALL

Tuesday, April 2nd, 4 pm – 5 pm ET



SPECIAL PROJECT AND VIPEER SERIES

The purpose of a Special Project is to allow us to take a step back to figure out how we do things, how to do things better, or figure out things we are not already doing. The Life & Business Plan assists in lowering friction and creating a clear vision. This supports more purposeful and meaningful priorities for our customers, our teams, and ourselves.

TOOLS GUT CHECK

Ideal Result/Expectations

Be pithy and explain your work, be concise and pithy, have an open mind for considering other ways of doing things, and ask thoughtful questions of others.

Purpose: Take a closer look at your tools stack and determine if you're using them effectively, purposefully, and efficiently.

Resources: The recording will be posted in our [*Special Projects Library*](#).

Action Items: Complete and upload by April 15th, 2024.

VIPEER

MARCH 27TH
11 am ET

Webinar topics and descriptions
will be included in the invite.



A SUCCESSFUL MEETING STARTS WITH PREPARATION

The Quarterly Meeting provides the opportunity to look beyond the day to day and step into a different environment that enables us to work on the business rather than in it. The power of being in person allows us to be in a setting that encourages openness and vulnerability. As a result, we should have a clear vision of our top priorities and actions required to move the business forward.

STEP 1

- ✓ Q1 2024 SMART Numbers Submitted.
- ✓ Complete Special Project and the Business Update.

STEP 2

- ✓ Review POD members' SMART Numbers, Business Update, and Special Project.
- ✓ Prepare notes and questions for each POD member.

We learn not just from viewing our businesses but by gaining perspective and understanding of each other's businesses. The meeting should not be the first time we have seen the Business Updates or SMART Numbers.

ROLES AND RESPONSIBILITIES



Captain Role
The POD Captain is self-selected by each POD to be the leader of the group. They will take on the role of facilitator for all POD breakout sessions. It is encouraged the captain nominate a Timekeeper and Notetaker to help facilitate the meeting more effectively.



Moderator Role*
Moderators will attend breakout sessions to assist with the basic format of the meeting. The moderator observes, assists with questions, and is a safeguard when a staff member is needed. They can easily navigate which of the TruMethods Staff is best suited for the situation. Each moderator brings a unique perspective and experience to our meeting.



Timekeeper Role
It is essential to keep time during each aspect of the meeting to make sure we use our time most efficiently and keep the conversation moving forward. The person elected is responsible for starting the timer, announcing when 30 seconds remain, and end time. If a topic warrants a deeper discussion, note it for a round table topic.



Notetaker Role
The purpose of this role is to capture any notes or discussion topics, including burning issues that are discussed in the meeting. The notetaker can enter burning issues and general meeting notes in the Peer Portal.

** A TruMethods Staff guide will be provided one week prior to the meeting.*

MEETING BEST PRACTICES

- Turn off email, text, and chat notifications to ensure focus.
- Be considerate with feedback and perspectives – feedback should be necessary, kind, and true.

QUARTERLY MEETING CHECKLIST

Just Released in the Peer Portal: Quarterly Meeting Prep Checklist

We are taking meeting preparation to a new level!

As we prepare for our April Quarterly Meeting, please leverage the new checklist to communicate your progress and enhance accountability around preparation.

On Friday, April 5th, at 12 pm ET, we will host the Peer Quarterly Meeting Prep Workshop, where we will discuss the enhanced Business Update, how to best leverage the Peer Portal for meeting prep, and ensure we have an awesome meeting in Orlando!

Quarterly Meeting Prep

[View Historic Data →](#)

[Meeting Checklist](#) [Business Update](#) [Grade & Evaluation](#) [Files](#)

[Export as PDF](#) [Export as Word Doc](#)

Upcoming Quarterly Meeting Information

| | | |
|------------------------------------|--|---------------------------------------|
| Special Project Tools Gut Check | Who is on the Hot Seat? Jumpstart Company | Is there a Great Idea Contest? Yes |
|------------------------------------|--|---------------------------------------|

Meeting Prep Checklist

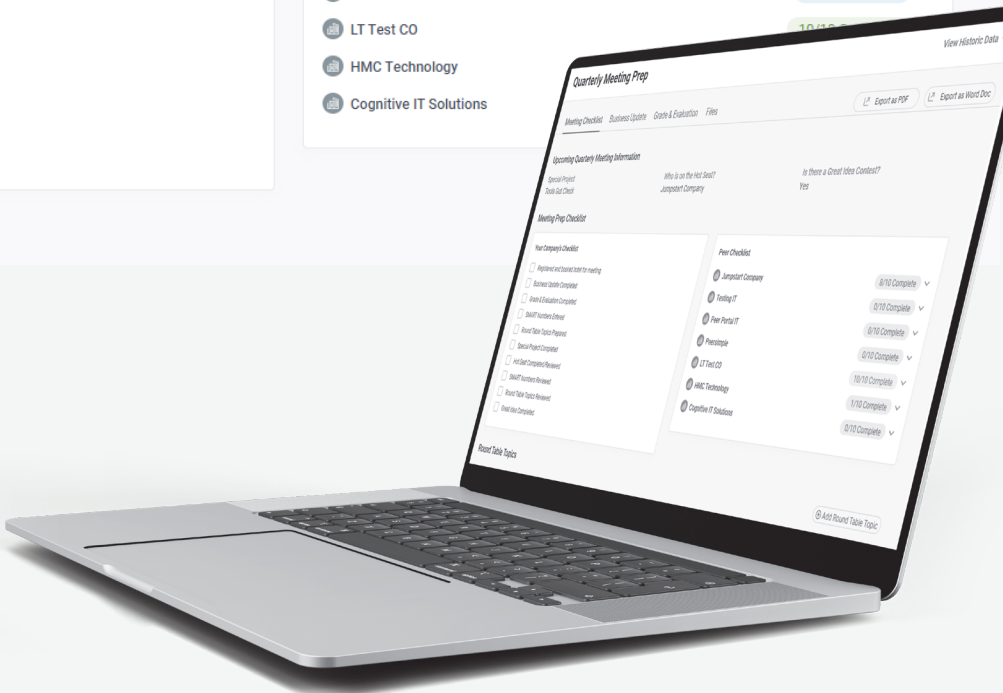
Your Company's Checklist

- ☐ Registered and booked hotel for meeting
- ☐ Business Update Completed
- ☐ Grade & Evaluation Completed
- ☐ SMART Numbers Entered
- ☐ Round Table Topics Prepared
- ☐ Special Project Completed
- ☐ Hot Seat Completed/Reviewed
- ☐ SMART Numbers Reviewed
- ☐ Round Table Topics Reviewed
- ☐ Great Idea Completed

Peer Checklist

- ☒ Jumpstart Company 8/10 Complete
- ☒ Testing IT 0/10 Complete
- ☒ Peer Portal IT 0/10 Complete
- ☒ Peersimple 0/10 Complete
- ☒ LT Test CO 10/10 Complete
- ☒ HMC Technology 10/10 Complete
- ☒ Cognitive IT Solutions 0/10 Complete

Round Table Topics



MEETING PREP: ACTION ITEMS

BUSINESS UPDATE

Purpose: Strategize the business and receive perspective from other like-minded individuals. This should align with your annual business plan.

Importance: The better you get at setting the right priorities is equal to or possibly more important than executing the plan. If you get this right you will move and learn faster.

Ideal Result/Expectations: A clear understanding of your 90-day plan, what you have to do next and what steps are needed to get there.

Workshop: Peer Quarterly Meeting Prep - Friday, April 5th, 12 pm ET

Action Items: Complete document and upload by April 15th, 2024.



HOT SEAT

Purpose: This exercise allows a company to get feedback from other business owners to ensure their logic and vision for the company will be the most impactful for moving the business forward.

Importance: An opportunity for Peer members to clarify the past, present, and future. We can articulate that vision with members in our POD and get good feedback on our plan and what we will do moving forward.

Ideal Result/Expectations: An excellent opportunity for POD members to analyze and give meaningful feedback on other companies' journeys and the vision for the future. This process helps us sharpen our tools as we support the member present on the hot seat. More preparation and focus on this exercise will yield better results for the presenter and the POD.

Resources: [Hot Seat Review](#)

Action Items: Complete document and upload by April 15th, 2024.

SMART NUMBERS

Purpose: Provides instrumentation around point in time data sets coupled with trends to support priorities and tracking business performance. Working towards more accurate and timely SMART Numbers helps build the foundation for decision-making.

Importance: SMART Numbers permits us to use data to help set the right priorities and define data driven success criteria.

Ideal Result/Expectations: Review your numbers and look for patterns, trends, and anomalies. Be prepared to discuss your situation and plan.

Resources: [SMART Numbers Guide](#)

Action Items: [SMART Numbers Center](#), submit data by April 15th, 2024.

MEETING PREP: ACTION ITEMS

GREAT IDEA CONTEST

Purpose: The Great Idea should be a specific plan that has made or saved you money or specific opportunities with emerging technologies, new products, and vendors. Include collateral forms, documentation, names, etc., to make your idea more complete.

Importance: This lets us discuss what we do right and bring creativity and innovation to the meeting.

Ideal Result/Expectations: Bring a Great Idea and US\$50 to present to the group. The cash goes into the Great Idea Pot, and members vote on who had the best Great Idea. Winners take all, and tie splits the pot. Note: if you do not bring a great idea, US\$100 is the penalty and added to the pot. We would rather have you participate with your Great Idea. Don't be shy.

Action Items: Complete document and upload by April 15th, 2024.

ROUND TABLE DISCUSSION TOPICS

Purpose: Allows time within the agenda for the POD to dive into topics that require a more profound discussion than allowed during the meeting or the accountability calls.

Importance: It allows us to stay on the agenda by allocating time to spend on more in-depth topics.

Ideal Result/Expectations: List topics in advance: topic categories, burning issues, innovation.

Action Items: Submit topics ahead of the meeting if possible.

