

A photograph of three diverse women sitting around a table, laughing and looking at documents. The woman on the left has long brown hair and glasses. The woman in the middle has dark curly hair and is wearing a black leather jacket. The woman on the right has dark hair and is wearing a blue and white striped headband. They are all smiling and appear to be in a collaborative meeting. A white mug is on the table in front of the woman on the right. The background is slightly blurred, showing indoor lighting and greenery.

KICKOFF MEETING GUIDE

Overview

This meeting is focused on getting to know one another better and laying the groundwork for a successful Circle. To this end, you'll:

- Agree to a set of values for your Circle
- Participate in a short “Connection Activity” to encourage personal reflection and sharing
- Agree on your Circle’s shared goals
- Make a few key decisions on how you’re going to run your Circle

Pre-Meeting Prep

Circle Leaders:

- Read our Circle Leader Introduction on page 4
- Read through the agenda so you feel prepared
- Keep a device for timekeeping at hand—a phone with a timer works well
- Create a [Jamboard](#) for your group brainstorm, or bring a whiteboard or large piece of paper if you’re meeting in person

Everyone:

- Download a copy of this PDF

Meeting Agenda

⌚ Approx. 100 minutes for total meeting (based on a group size of ten members)

1 **Check-In** ⌚ Approx. 15 minutes
Warm up, catch up, and get going **p.7**

2 **Circle Fundamentals** ⌚ Approx. 15 minutes
Agree to shared values for your Circle **p.7**

3 **Connection Activity** ⌚ Approx. 25 minutes
Share, connect, and grow together **p.8**

4 **Circle Goals** ⌚ Approx. 25 minutes
Set group goals for your Circle **p.10**

5 **Wrap-Up** ⌚ Approx. 20 minutes
What's next and a few final words **p.12**

Circle Leader Introduction

As a Circle Leader, you make sure your Circle runs effectively and your meetings are productive and rewarding for your members. It can be a big job, but we hear two things regularly from our Circle Leaders: it's incredibly rewarding, and they're developing—and getting recognized for—their leadership skills.

Materials and Resources for Circle Leaders

We provide the following materials and resources to help you manage your Circle:

- A [Facebook group](#) so you can share ideas, exchange best practices, and network with other Circle Leaders
- All-in-One [Meeting Guides](#) with everything you need to run a meeting from beginning to end
- Resources for [getting started](#), including tips for scheduling your first meeting and a checklist to help make sure you have everything you need before, during, and after your first meeting

Background for Your Kickoff Meeting

Your first meeting is important because everyone gathers together for the first time and you decide as a group how you want to run your Circle. To make sure you feel prepared to lead the conversation, we want to go over the following sections with you in greater detail.

Circle Leader Introduction (cont.)

Circle Fundamentals

There's no right or wrong way to run a Circle—you and your members should make the experience your own—but it's important to have shared values so everyone knows what's expected of them and what they can expect from everyone else. Based on the recommendations of several experts in group dynamics and our own research into what makes small groups work, we've developed what we call our Circle Fundamentals:

Confidentiality

Trust is critical. What happens in your Circle should stay in your Circle.

Why it matters: Members won't want to share real issues if they don't feel they can trust everyone in the Circle. We recommend you talk openly about the importance of confidentiality as a group and come up with a plan for dealing with a break in confidentiality before it's an issue with real members and hurt feelings.

Communication

Commit to share openly and honestly—and to listen with empathy.

Why it matters: Research shows that sharing begets sharing. As you share with one another, you'll feel more connected and better positioned to offer helpful insights and ideas. When you're listening, it is important to "listen in order to understand" (rather than "listen to respond") and resist the urge to judge others' choices or experiences.

Commitment

Everyone should be invested in your Circle's success and be fully present at meetings.

Why it matters: The more everyone participates, the more you'll all get out of your Circle—the expression "groups are only as strong as their weakest link" is true. We recommend Circles meet ten times a year, and members remain active for a year.

Circle Leader Introduction (cont.)

Spend time with your Circle talking through these fundamentals. Whether they work for everyone as written or you revise them based on member input, make sure you agree to a set of values for your Circle. You may also want to come up with a way to keep them top of mind. For example, some Circles recommit to their fundamentals at the beginning of every meeting or post them online as a reminder. You can always find our Circle Fundamentals at leanincircles.org/running-your-meetings.

Circle Goals

Shared goals will help your Circle choose relevant topics for discussion, gauge the success of your meetings, and generally stay on track as a group. In our Kickoff agenda, we walk you through a process for identifying up to three goals for your Circle. If you're having a hard time choosing goals that work for everyone, try making them broader in focus—for example, instead of "Get raises," a broader goal might be "Ask for and get what we deserve," which could include more flex time, a larger role, etc.

Try to pick one core goal that you're going to focus on in the beginning—the more focused you are, the more likely you'll be to see early results. And remember, you can revisit your goals at regular intervals and update them as members' priorities change.

Wrap-Up

During the wrap-up at the end of your meeting, we recommend you talk about how you intend to run your Circle—especially if you want to ask for help!

We've seen several approaches work well (and there are certainly others):

- A single Circle Leader runs a Circle for a set period of time (such as six months or a year).
- A single Circle Leader serves as "manager" (sends information and updates, schedules meetings, etc.), but Circle members take turns running monthly meetings.
- Co-Leaders share responsibilities. In some cases, they serve as partners on everything; in other cases, one Leader manages the Circle and the other facilitates meetings.
- The whole Circle runs as a co-op, with different members taking the lead each month.

Before your Kickoff meeting, we recommend you think about possible approaches and talk to other members of your Circle to gather their thoughts and gauge their interest in participating more actively. Then, come prepared with your recommendation and/or a list of options for discussion. Your goal is to close the meeting with a clear understanding of who's going to do what.

Kickoff Guide

Check-In

Warm up, catch up, and get going

🕒 Approx. 15 minutes

 Group activity

An icebreaker is a great way to get people talking. Given that this is your first meeting, start by going around your Circle and introducing yourself as if you're meeting everyone for the first time (even if you're not):

- My name is ...
- I spend most of my time ...
- I joined this Circle because ...

Circle Fundamentals

Agree to shared values for your Circle

🕒 Approx. 15 minutes

 Group activity

In this and most meetings, you'll be asked to be open and honest about your thoughts, skills, and experiences, even if that means pushing yourself outside your comfort zone. That's where our Circle Fundamentals come in. They are values that everyone in your Circle agrees to so you have a shared understanding of what you can expect from one another.

Read and discuss our Circle Fundamentals. If they don't feel quite right for your Circle, take some time to adjust them together. Once everyone is ready, go around your Circle one by one and commit to them with a quick thumbs-up or "I'm in."

If you end up writing your own fundamentals, you may want to have someone type them up and share them with everyone in your Circle. You can always refer to ours at leanincircles.org/running-your-meetings.

Circle Fundamentals (cont.)

Confidentiality

Trust is critical. What happens in your Circle should stay in your Circle.

Communication

Commit to share openly and honestly—and to listen with empathy.

Commitment

Everyone should be invested in your Circle's success and be fully present at meetings.

Connection Activity

Share, connect, and grow together

🕒 Approx. 25 minutes

Connection Activities are focused on sharing personal stories and benefiting from your Circle's ideas, experiences, and support. In this activity, you'll answer questions designed to get you to think about your personal goals—and your motivations for joining your Circle.

Step 1: Member Q&A

👥 Group activity

🕒 1 minute or less per member each round

One by one, go around your Circle and answer one of the following questions. (It doesn't matter how many times a question has already been answered; choose the one that most resonates with you.) While other members are speaking, resist the urge to ask for more information. Just listen quietly.

- When you look back a year from now, what do you hope this Circle has helped you accomplish?
- What is one thing in your life you wish you could change?
- If you had to describe your life in three sentences, what would you say?
- What holds you back from pursuing your boldest dream?
- What is your biggest fear, and where does it come from?

When everyone has answered one question, go around the Circle one by one and answer a second. Continue to respect one another's space and refrain from asking follow-up questions or breaking into conversation.

Connection Activity (cont.)

Step 2: Reflect on the exercise together

 Group activity

 Approx. 5 minutes

Without discussing the previous activity, one member should read aloud the following statements, and everyone should raise their hand when a statement feels true for them.

- As other members answered questions, I felt like sharing more freely.
- I learned something about myself or someone else that I didn't expect.
- I was surprised by how much I have in common with other members.
- I feel an initial connection with the other members of my Circle.

If you liked this initial sharing activity, we recommend you consider incorporating our [Connection Cards](#) into your next meeting. We developed the cards with Carole Robin, a professor at the Stanford Graduate School of Business. The goal of the cards is to get to know one another better by answering questions and sharing a lot of information fast—think of them as TableTopics for your Circle! You'll find a guide with everything you need to run a Connection Card meeting [here](#).

Circle Goals

Set group goals for your Circle

🕒 Approx. 25 minutes

Setting shared goals for your Circle will help you choose relevant topics for discussion, gauge the success of your meetings, and generally stay on track.

Step 1: List your personal goals

👤 Individual activity

🕒 Approx. 5 minutes

Write down your three biggest personal goals (such as taking more professional risks, creating better work/life balance, building a network of supporters, etc.).

1

2

3

Circle goals (cont.)

Step 2: Identify the top goals of your Circle

 Group activity

 Approx. 20 minutes

Go around your Circle and share your top three personal goals one by one. Have a member write them down on your [Jamboard](#) (or whiteboard/piece of paper if you're meeting in person) so everyone can see them.

When you're finished, spend some time identifying up to three goals that are common across your Circle, grouping similar goals together wherever possible. If you end up with more than three, use a show of hands to vote on a final list. And remember, it will be easier for your Circle to stay on track with very specific and focused goals.

When you're done, make sure you type up and distribute your final list of goals so you can refer to it going forward.

Wrap-Up

What's next and a few final words

🕒 Approx. 20 minutes

Step 1: Decide how you're going to run your Circle

👥 Group activity

🕒 5 minutes

If you'd like to rotate the role of Circle Leader in every meeting, discuss how you want to run your Circle as a group. No matter what you decide now, you can try new approaches as you all become more comfortable with the day-to-day rhythm of running a Circle. We've seen lots of approaches work, from a single Circle Leader with a year-long term, to a rotation where everyone takes turns running a meeting.

Step 2: Finalize logistics of your next meeting

👥 Group activity

🕒 5 minutes

Before you break, make sure you have the basics covered for your next meeting: day and time, location, and food and drink if you're meeting in person. Decide what you're going to discuss in your next meeting—for example, you may want to dive into our [Connection Cards](#) together.

You may also want to talk through what worked—and what didn't—in today's meeting and brainstorm improvements going forward.

Step 3: Close on an energetic and inspirational note

👥 Group activity

🕒 2 minutes or less

End your meeting by sharing your final thoughts with one another. For example, go around one by one and describe how you're feeling in three words. Best we've heard so far: "Ready for anything!"

**Congratulations on a
great first meeting.**