



# Team Communication Plan

Effective, clear, and honest communication is the cornerstone of any team. Following is a summary of strategies you can employ to better communicate with your team on a daily basis. We recommend putting them on your calendar as recurring events. As you'll see, developing a repeatable process and sticking with it will help increase the effectiveness of your entire office and allow you to devote more time to building your business.

Type	Purpose	Frequency	Tips
<b>Huddle</b>	This is a brief, informal meeting to discuss the day's to-do list and review any cancellations, reschedules, or urgent issues.	Daily, preferably for 10 to 15 minutes each morning.	Empower a team member to be in charge of your daily huddles.
<b>E-mails</b>	E-mails should be used for brief communications, such as informing the team you'll be arriving later than expected. Also, use e-mail to ask or respond to a direct question (i.e., "Did John Smith cancel today's meeting?")	Throughout the day as necessary.	Be brief and make sure that your message is clear, as the meaning or tone of an e-mail can be easily misinterpreted.
<b>Phone calls</b>	Quick phone calls throughout the day can be used to check in with the team when you're traveling, or to recap the day before a team member leaves. These can be used to replace a daily huddle, if necessary.	Sparingly and kept under five or 10 minutes.	Refrain from calling your team on your drive into the office, or if you're just looking to "kill time."
<b>Team meeting</b>	This is a formal meeting that keeps each member of your team (including you) updated, involved, and engaged with what is going on in your practice. Use the time to review open cases, service items, upcoming meetings, prospect and referral lists, and progress on any items discussed in the previous meeting.	Weekly, no more than 45 minutes. On either Monday or Friday morning.	Use a standard agenda and put someone in charge of keeping notes and distributing them shortly after the meeting.
<b>Planning meeting</b>	This is a formal quarterly get together where you and your team conduct strategic planning and discuss larger initiatives around client acquisition, client service, events, and marketing. Also, use these meetings to set production and activity goals for you and your team.	Quarterly, for two or more hours.	Circulate an agenda to your team prior to the meeting and encourage others to add items and initiatives that they'd like to discuss.





## Four ways to be a more effective communicator and leader

- 1** Remember that everyone has a different communication style and absorbs information in different ways. Ask each team member how he or she best communicates.

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- 2** Prioritize various tasks. Don't assume someone knows what you want done or the order in which you want it done.

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- 3** Don't be afraid to over-communicate on work-related matters. If daily morning huddles feel insufficient for a high volume office, consider adding one in the afternoon.

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- 4** Encourage participation and dialogue. Create a safe space for your team to share their feelings, perceptions, and ideas. This is one of the best ways to engage your team, make them feel their opinions count, and limit office turnover.



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