

## PRACTICAL TOOL

# Operating Cadence Planner

A practical guide for designing meetings, checkpoints, and review routines that create decisions, ownership, and adaptive follow-through.

## THIS RESOURCE HELPS YOU

- Make recurring meetings serve a defined operating purpose.
- Connect inputs, decisions, actions, and escalation.
- Remove duplicate or low-value cadence.

# The anatomy of a useful cadence

## Purpose and frequency

Be explicit about the operating outcome the cadence exists to support and how often that outcome needs review.

## Required participants

Include the people needed to decide, contribute essential information, or own follow-through - not everyone affected by the topic.

## Preparation and inputs

Define what information must be current before the meeting so time is not spent reconstructing status.

## Decision points and agenda

Organize the conversation around choices, material variance, risk, and actions rather than around round-robin updates.

## Documentation and escalation

Capture decisions, action owners, unresolved risk, and the condition that requires escalation to another forum.

# Three example cadence patterns

## Execution check-in

A short, frequent review of priority work, blockers, owner actions, and near-term decisions. Keep it focused on movement and exceptions.

## Decision review

A focused forum used when a defined set of cross-functional or higher-consequence decisions require the right authority and inputs.

## Performance review

A periodic review of results, variance, risk, and changes needed in priorities, capacity, or operating routines.

## The design principle

Different cadences should do different work. If two meetings review the same information and create the same decisions, combine or remove one.

## The output test

A useful cadence should leave behind clearer decisions, owned actions, visible risks, or an agreed adjustment to execution.

# Make meetings produce follow-through

## Use pre-work for status

Move routine updates into a shared view so meeting time is reserved for interpretation and action.

## Name the decision before the discussion

Participants should know what must be resolved and who has authority to resolve it.

## Assign one owner to every action

Shared ownership usually becomes no ownership. Name a role and a due condition or date.

## Carry unresolved risk forward visibly

Do not let unresolved issues disappear between meetings; keep them on the operating view until closed or escalated.

## Review the cadence itself

If a recurring meeting no longer produces useful decisions, action, or visibility, redesign or remove it.