

First Team Meeting

Preparation card for a new manager leading former peers

A suggested 20-minute route - adapt to your team

0-3 min Acknowledge	3-7 min Priorities	7-14 min Listen	14-18 min Agreements	18-20 min Close
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Confirm your scope with your manager first. Mark unknowns as questions, not promises.

01 Meeting date and team

02 One outcome today - what should be clearer?

03 This week's priority - deliverable / owner / date

04 Decision boundaries - I can decide... / approval needed for...

05 Opening sentence - what changed / what stays for now

06 Listening questions - what to keep / what needs clarifying?

07 One working agreement - channel / use / review date

08 Open question - question / answer owner / update date

09 First 1:1 invitations - send date

10 Recap - owner / send date

This PDF sends nothing. Save only in approved work storage and check that your viewer saves typed text. Do not enter confidential employee information.

Original KSB educational tool, not a validated intervention. Suggested timing is adaptable. Not for formal HR, disciplinary, grievance or crisis meetings.

One complete worked example

Illustrative scenario - not a customer result. Roles, dates and commitments are examples; confirm your own scope and capacity.

01 Meeting date and team

Internal operations team; Tuesday, 10:00 (local time).

02 One outcome today - what should be clearer?

Clarify ownership of Friday's release checklist and how to raise a blocker.

03 This week's priority - deliverable / owner / date

Alex drafts the release checklist by Thursday noon. Confirm Alex's capacity before agreeing this.

04 Decision boundaries - I can decide... / approval needed for...

I allocate routine tasks. The department head approves changes to the release date.

05 Opening sentence - what changed / what stays for now

My responsibility for routine handoffs has changed. Current release dates stay in place while I learn what needs clarifying.

06 Listening questions - what to keep / what needs clarifying?

What is working that we should keep? Where is an unclear priority, handoff or decision slowing us down?

07 One working agreement - channel / use / review date

Use the approved project channel for routine blockers: task, blocker and decision-needed time. Review next Tuesday; sensitive matters use the approved private route.

08 Open question - question / answer owner / update date

Who approves urgent exceptions? I will ask the department head and update the team by Tuesday, 16:00, even if the answer is still pending.

09 First 1:1 invitations - send date

Send invitations on Wednesday; use them to discuss current work and useful support.

10 Recap - owner / send date

I send a work-only recap Tuesday, 14:00. Check that it reflects actual agreements.

Before you use your version: separate confirmed facts from open questions; give each follow-up an owner and update date; remove promises you cannot keep.

[Use the full free meeting guide >](#)

The full free guide contains adaptable opening and recap scripts. You do not need to buy a toolkit to use this card.