COMPANY USER GROUP

Meeting Best Practices

The document provides guidance on building a healthy Company User Group. It emphasizes encouraging active participation, selecting engaging speakers, and developing a meeting plan template.

To build a healthy Company User Group, we suggest planning a meeting once every 90 days (i.e. quarterly) and when possible, building out a meeting roadmap in advance. We've seen that consistency helps CUG members feel connected and contributes towards their active engagement.

Pro tips

Engage participants
Encourage active participation by asking open-ended questions and seeking input from all attendees.

Use breakout rooms
Utilize breakout rooms for smaller group discussions and networking opportunities.

Interactive tools
Incorporate interactive tools like polls, Q&A sessions, and collaborative documents to keep the meeting engaging.

Before you get started

Before the meeting, ensure that all technical aspects are in place. This includes testing the video conferencing platform, ensuring a stable internet connection, and preparing any presentation materials.

Things to remember:

Company User Group (CUG) Leadership team
- Do you have a healthy leadership team to assist with member engagement, meeting logistics, and promotion?
- We recommend having at least 3 colleagues to assist with your CUG.

Timing
- It typically takes about 2-4 weeks to effectively plan and prepare for a CUG meeting.
- If you're short on time, you might want to explore engagement activities within your CUG channel/space instead.

Topic selection

· Deep dive into a single use case instead of attempting to cover multiple topics in a single event.

Speakers

· It is important for all speakers to be engaging, and addressing questions related to the topic.
· It is also important to conduct at least one dry run to assist the speakers.

Day of logistics

· Ensure that all technical aspects are in place. This includes testing the video conferencing platform, ensuring a stable internet connection, and preparing any presentation materials.

Roles and responsibilities

Meeting lead(s)

· Coordinate, create, and facilitate virtual/in-person meetings.
· Stay connected to the CUG Program Lead for support.
· Encourage active participation and create a welcoming environment for all attendees.

MC(s)

· Facilitate the flow of the virtual event.
· Coordinate introductions and transitions between agenda items.
· Ensure smooth and engaging interactions throughout the event.

Moderator(s)

· Actively participate in discussions within the virtual or in-person meeting and provide guidance where necessary.
· Support the facilitation of breakout sessions and group discussions.

Tech support

· Ensure all technical aspects are in place for the virtual or in-person meeting.
· Provide technical expertise and assistance to address any challenges effectively.
· Support the use of interactive tools and manage technical aspects during the event.

Promoter(s)

· Encourage active participation and engagement within the virtual event.
· Assist with funding and swag for meeting-related activities.
· Posts meeting invites and recaps for CUG members either via email or the CUG channel.

Meeting plan template

Category	Work-stream	Owner	Due date
Content development	Meeting format	Cug leaders	
	Draft key messages	Promoter(s)	
	Outline content	Promoter(s)	
	Review/finalize deck	Cug leaders	
	Speakers prep	Meeting lead(s)	
	Schedule	Cug leaders	
Promotion	Email	Promoter(s)	
	CUG announcement	Promoter(s)	
Logistics	Schedule kickoff	Meeting lead(s)	
	Assign roles	Cug leaders	
Post-meeting	CUG recap	Promoter(s)	
	Share insights	Promoter(s)	

Sample agenda

Time	Agenda Item
10:00 AM	Welcome and introductions
10:10 AM	Speaker presentation
10:40 AM	Q&A session
10:55 AM	Meeting wrap-up / networking

Welcome and introductions
- Start the meeting with a warm welcome and brief introductions from all participants.
- Use icebreaker questions to create a friendly atmosphere.

Atlassian product updates
- Provide updates on new features, best practices, training and upcoming releases.
- Encourage questions and feedback from the group.

Breakout sessions
- Divide participants into smaller groups for focused discussions on specific topics.
- Assign a facilitator for each breakout room to guide the conversation.

Group discussions
- Bring the groups back together to share key takeaways from the breakout sessions.
- Encourage open dialogue and idea sharing.

Q&A session
- Allocate time for participants to ask questions and receive answers from Atlassian associates.
- Use interactive tools for efficient Q&A management.

Meeting wrap-up
- Summarize key points discussed during the meeting.
- Share the next steps and action items.

Step-by-step guide with tips & tricks

ⓘ **This guide applies to all formats of Company User Group meetings.**

These good practices will contribute to the successful planning and execution of engaging and productive Company User Group meetings.

	Step	Good practices	Timing
1	**Purposeful planning**	Start with a clear understanding of why you're creating the meeting for your members and decide on the meeting format.	3-4 weeks out
2	**Role assignment**	Decide on the roles needed for the meeting, ensuring that at least one person is assigned to each role as per the Roles & Responsibilities table.	3-4 weeks out
3	**Utilize meeting plan template**	Start with a clear understanding of why you're creating the meeting for your members and decide on the meeting format.	3-4 weeks out
4	**Speaker selection**	Confirm speakers or guests if needed, ensuring they are engaging, comfortable addressing questions, and relevant to the audience. For Atlassian SMEs, connect with your account team early to secure their participation.	3-4 weeks out

	Step	Good practices	Timing
5	**Select the date**	Typically, Tuesdays, Thursdays, and Fridays are considered the most suitable days for hosting meetings. On Mondays, people are usually catching up from the weekend, while on Wednesdays, they are in the midst of their work week.	3-4 weeks out
6	**Kickoff call**	Host a kickoff call to finalize the event details, goals, audience, messaging, and to build momentum early in the planning process.	1-2 weeks out
7	**Content development**	Develop engaging content by determining key messages, writing an outline for promotion and recaps, and considering interactive elements such as polls and demos to keep the audience engaged.	1-2 weeks out
8	**Dry-run preparation**	Host a dry-run session with all CUG leaders and speakers to ensure they are well-prepared and comfortable with the presentation.	1 week out
9	**Equipment readiness**	Ensure that all necessary equipment, such as microphones, webcams, or virtual backgrounds, are ready at least 30 minutes prior to the meeting.	30 minutes prior to the meeting
10	**Record the meeting (if you want to share recordings with your members)**	Start 2-3 minutes past the scheduled time to allow attendees to trickle in.	During meeting

Step		Good practices	Timing
11	**Post-meeting recap**	Share a post-meeting recap with the CUG channel or via email to keep members informed about the key takeaways and next steps.	Post-event
12	**Content repurposing**	Consider how the meeting content could be repurposed for smaller videos, discussion topics on the CUG forum, or blog posts to extend its impact beyond the meeting.	Post-event

This meeting best practice resource is designed to facilitate engaging and productive Company User Group meetings, fostering collaboration and knowledge sharing among participants.

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