



Return Leverage

Customer Success Story

Case Study: Return Leverage uses Lucid Meetings to help clients free up to 30% of their workday

Executive Summary

Return Consulting has worked for many years with clients from startups to the Fortune 50.

Over that time, they've found that **the most uniform shortcoming across all organizations is the weak commitments made in poorly run meetings, working toward ill-defined project objectives.**

[Toby Lucich](#), Return's Founder and CEO, saw an opportunity to solve this problem for his clients, and was inspired to create [Return Leverage](#) - a service that enables leaders and project specialists to redefine their workload by delegating the day-to-day details of project management, meeting facilitation and task organization.

Using Lucid, Toby and his expert team drive these often overlooked essential habits within client organizations in a very effective way.

We spoke with Toby Lucich for this case study, and here's what he had to say.

The Problem - And Inspiration for a New Service

Many of the clients Return worked with suffered from poorly run meetings, but this hasn't been due to a lack of knowledge, or inadequate training.

Instead, Return found that clients wanted to rush through meetings, trying to keep their scarce employee resources focused on the most critical work at hand - the specific tasks that make the 'highest and best use' of their available expertise.



Toby Lucich, Founder and CEO of Return Leverage

"The problem is that when organizations try to shortcut their meetings, they lose the fundamental cadence that confirms commitments and drives accountability," Lucich shared. "This 'hurry up offense' left no one doing the basic blocking and tackling work anymore – such as conducting effective meetings, monitoring commitments and deliverables, and keeping track of all the little details."

"Once we named it, we saw it everywhere. Building agendas, coordinating meeting logistics, and chasing people for deliverables isn't sexy, and its not always fun. But it's a non-negotiable aspect to running and managing successful teams and projects.

And while excellence in the most foundational corporate tasks doesn't ensure success, the absence of it often prevents it. This work doesn't require an MBA, but you also can't simply task your Admin Assistant and expect excellent results."

As expert project leaders and change managers, Return's delivery required diligent management of time and commitments, so the work had always been simply baked into the delivery mode. When clients lacked this foundational habit, Return's experts had simply filled the gap.

"There seemed to be an expectation gap – this idea that if you called the meeting, you had to set it up and be the expert facilitator running effective meetings.

I would hear, 'Well, that's not how I run my meetings because I'm about doing the work, not talking about it,' which was frustrating. Really smart, capable experts didn't derive value from structured meetings themselves, so dismissed the potential value that others might find."

Return saw companies struggling with the same fundamentals time and time again. Too often, meetings were haphazardly scheduled, pushed onto calendars without agendas or objectives, and lacking any kind of consistent process for follow-up or ensuring that attendees were following through on commitments.

This created real problems for Return's senior consultants, who would often become engaged in an initiative, only to find that the most valuable thing they were doing was bringing order to the meeting management chaos. This was expensive for clients, and boring for the senior consultants.

"We knew there had to be a better, more effect and repeatable way to engage on a project. While we gladly rolled up our sleeves - scheduling meetings, taking notes, following-up on action items - on an ongoing basis, this isn't the highest and best use of seasoned consultants (or our client's budget)."

While taking on basic meeting management was a mismatch for Return's expert consulting resources, it spotlighted a terrific opportunity. Return Consulting introduced Return Leverage, bringing new specialized resources to the table to drive the foundational meeting management habits within client organizations.

Overwhelmed by too many tools

They began experimenting with dedicated meeting moderators in 2015. At the time, they were working with a widely distributed team and half a dozen vendors, stretching to serve 20+ enterprise initiatives.

At first, they tried using JIRA, Confluence, and BitBucket (from [Atlassian](#)), [Workfront](#) and [Asana](#) (for project and portfolio management), WebEx for meeting sharing, and tools like Word and Notepad to try and capture important commitments and details. All this effort would get posted in any of a dozen systems and distributed by email as well.

"Resources were drowning in the thrash of communications, but weren't getting clear messages about changing priorities or expectations.

Everyone had an opinion on how to get work done, but without a clear and consistent process, no one was willing to take the time and agree on a single, simple solution. The client – and our team too – were suffering a serious case of change fatigue."

Return realized that the core issue was that their client organizations lacked some critical foundational habits, like effective meeting management. It wasn't that any of the many software tools they tried were broken.

There was simply too much work in flight, without any defined process, and no single tool helped with running good meetings - exactly where they needed help most.

In an attempt to find an easier way to run meetings, they experimented with several of the major screen sharing platforms (Webex, GoToMeeting, Join.me), conference lines and even a few very expensive video conferencing technologies. In each case, they found that the most basic "input" and "output" were missed. Agendas or objectives were not circulated in advance, and follow-up was haphazard at best.

"Traditional online meeting vendors seem to think that if you get people to the same location at the same time, the rest will take care of itself. But it doesn't work that way."

They also experimented with a few of the new "getting things done" platforms, but soon realized that these required broad adoption within the client's organization before they could really see much value.

"We needed a technology partner that would let us model good practice, but also let us formalize practices and enroll people in our process in a more organic way."

Discovering Lucid

Return Leverage's CEO Toby Lucich learned about Lucid through his professional network, and contacted Lucid Meetings' founders to talk about his company's needs.

"John and Elise had a very compelling vision, and a straight-forward tool design that meant we could get up and running quickly."

Lucid Meetings is now a key component of Return Leverage's service offering. Each dedicated "Leverage Project Specialist," provides a moderated meeting experience that clients say is "unlike anything they've ever known" - in a good way!

"It's been amazing how Lucid lets us move from lecture - 'meetings should be run...' to modeling - 'this is how we run effective meetings'.

As the hands on the keyboard, we do the driving so our clients can - at least initially - focusing exclusively on the conversation and outcome. Our goal is to deliver unparalleled support, and Lucid helps us do just that.

*One of the things we love most is **how easy Lucid Meetings was to integrate into our current practice**. While many of our clients already have existing project management tools or enterprise systems they would like us to use, very few (if any) have formalized how they run meetings.*

This allows us to begin an engagement on strong footing, and provide a high level of transparency and clear expectations with client teams starting on day one."

The Lucid Meetings platform enabled Return Leverage to introduce and formalize repeatable meeting management processes, which when supported with an expert meeting moderator, allows their clients to focus their attention on critical outcomes.

"Most of our clients have proven themselves to be successful project leaders, and know they could do so much more with just another a couple of hours in their day.

By bringing Lucid and Leverage to the table, these leaders can delegate the 10-30% of their workday otherwise spent dealing with stakeholder logistics and administrivia to us, and create the extra cycles they need."

Example: Leverage Uses Lucid to Delight a Prospective Client

Toby personally worked with a prospective client to introduce the service. To demonstrate the value of Leverage's services, he and a Project Specialist moderated a 15+ person operations meeting lasting 2 hours, with multiple speakers sharing updates to leaders that had traveled from across their operating region.

When they debriefed the meeting the next day, the operations lead they were supporting was astounded at the details and actions that were captured in Lucid.

Even though Toby captured visible notes in real time, the client leader stayed focused on his people, not the note taking. The client was even more thrilled when he realized that this same conversation with his team could happen remotely, which meant that he could start convening his distributed team more regularly without expensive travel and logistics concerns.

“When we can help leaders be more effective, and turn meeting expense into business investment, we’ve changed their thinking for good. Lucid is an indispensable part of our value proposition.”

Empowerment Leads to Increased Buy-In and Accountability

Toby and his staff consistently hear two things about Lucid-enabled meetings:

1. Clients immediately notice that meetings are much more valuable when a little bit of pre-planning occurs and agendas are generated. **They feel like their involvement has purpose, and that they know what is expected from them before the meeting starts.**
2. **The client feels empowered** – not only do they see the notes and the historic record of the meeting being captured in real time, but they can have a hand in editing the discussion as well as the action items.

Because they always wrap up meetings with a quick review of the new action items (via a smart list), they give everyone a last chance to clarify accountability and their commitments.

“It’s really exciting to see how committed people are when they can accept – rather than be assigned – important tasks.”

Conclusion

The team at Return Leverage is dedicated to helping leaders and project specialists by allowing them to focus on what’s important to them and make the highest and best use of their time and resources.

By setting up their specialized professionals on the Lucid Meetings platform, Return Leverage is able to create a repeatable meeting management process they can use with each client.



Lead better meetings. Capture decisions. Share results.

Lucid helps Leverage model effective meeting management and efficiently take on a client's blocking and tackling activities. This redefines their clients' workload, giving them back 10-30% of their workday.

More importantly, running excellent meetings for clients results in teams that know their involvement has purpose and walk away feeling empowered.

Learn more about Return Leverage and their services at www.returnleverage.com.