



YOUR FIRST TEAM MEETING TOOLKIT

A PRACTICAL GUIDE FOR NEW LEADERS

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WELCOME TO YOUR FIRST TEAM MEETING TOOLKIT!

Whether you're stepping into your first leadership role or leading a new team, this guide is here to help you start strong.

This handout is based on the episode: How to Lead Your First Team Meeting Well. Inside, you'll find: - A 6-step leadership framework - Pre-meeting checklist - Guided scripts - Strategic questions to ask - A notes page for capturing insights - A 30-day leadership action plan.

You only get one first impression—let's make it count.

THE 6-STEP FRAMEWORK

1. Build Trust First – Model humility: “I’m here to learn from you.” – Psychological safety is the foundation for high-performing teams.
2. Use a Light Icebreaker – Example: “If you could trade jobs with anyone for a day, who would it be?” – This lightens the mood and helps you observe team dynamics.
3. Share and Define – Share your background, values, and what teamwork means to you. – Lead from a learner mindset, not an authoritarian tone.
4. Ask Meaningful Questions – “What’s working well that I should leave alone?” – “What really needs to change?” – “What’s the best/worst thing about working here?”
5. Thank Them – Express appreciation for their openness and time.
6. Close with Intent – Preview one-on-one meetings: “I’ll be meeting with each of you in the next few weeks...”





PRE-MEETING CHECKLIST

Before the Meeting:

- ☐ Rehearse your opening statement
- ☐ Choose an icebreaker question
- ☐ Write out 2-3 personal facts or hobbies
- ☐ Review the 3 questions you'll ask
- ☐ Print this toolkit
- ☐ Bring a notebook or tablet to capture insights

Mindset Prep:

- ☐ I'm here to learn
- ☐ I'm not the hero of the room—my team is
- ☐ I want to build trust more than prove authority

GUIDED SCRIPT TEMPLATE

Meeting Part	Talking Point or Sample Script
Opening Line	“Thank you all for being here. I’m excited to be part of this team.”
Icebreaker	“Let’s start light—if you could trade jobs with anyone for a day, who would it be?”
Introduce Yourself	“Here’s a bit about my background, how I lead, and what matters to me...”
Define Teamwork	“To me, teamwork means supporting one another, solving problems together...”
Ask Key Questions	See questions on next page
Express Gratitude	“Thank you for hearing me out and sharing today.”
Set Next Steps	“In the next few weeks, I’ll meet with each of you one-on-one to better understand how I can support you.”





STRATEGIC QUESTIONS & NOTES

Questions to Ask the Team:

1. What's something that's working well that should stay the same?
2. What's something that definitely needs to change?
3. What's the best part about working here?
4. What's the hardest or most frustrating part?

Notes: (Use this space to jot down observations, key phrases, team dynamics)

30-DAY NEW LEADER ACTION PLAN

Week 1: - Observe and listen during team meetings - Note cultural norms and informal leaders

Week 2: - Begin one-on-one conversations (30-45 minutes) - Ask about career goals, frustrations, and support needs

Week 3: - Review feedback themes - Look for quick wins (easy-to-fix items that show responsiveness)

Week 4: - Share what you've learned with the team - Co-create one team improvement goal or new habit

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