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Designing Interaction into Meetings

Maximizing the value of group meetings

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- Increasing participation and creativity within large meetings.
- Using the combined brainpower in the room
- Building in effective after-meeting steps
- What a leader does differently to manage dialogue with a group

groupMind solutions

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Many organizations regularly convene large meetings made up of 50 to 200 members, drawn from different business units or from various partner organizations. Such meetings are usually forums to manage a change of direction (new leadership, new strategy, new operating model) or to include diverse constituents in an information sharing process (mergers, partner or supplier relations.)

To maximize the impact of these meetings, we find it useful to leverage technology to build in opportunities for individual participation and for focusing input towards shared priorities or criteria. This is very different from having one or two brave (or powerful) souls stand up in front of 120 people and pose an issue to the speaker.

Meetings become more effective when the participants have the ability to interact in a way that is structured, inclusive and convergent. Members are no longer passive, the meeting gets the benefit of the combined group intelligence, and there is immediate, actionable feedback and focus. Let us look at the methods suggested by each of the terms above in more detail.

Structured response

In order to deal with size, time and quantity constraints, interactive input must be channeled through technology. To handle a large amount of data and to digest it in a useful way, the group's input must be structured. The structure can be viewed as

- *Asking the right questions*
  In order to get useful group input, it is imperative to carefully craft the focal questions. This is the subject for a paper in itself, but we can note here that there should be sufficient single focus, clarity, context and in some cases, challenge so that the audience is all talking within the same scope of interest. The audience will respond to the specifics of the question, so it must be stated specifically to elicit the desired thinking - sometimes it is important to state what is not requested as well.

- *Maintaining a simple process*
  When a large number of individuals are involved, the impact of a lack of simplicity is magnified quickly. It behooves the leaders of a meeting to make the interaction easy to understand, intuitive to execute, and difficult to countermand. It is surprisingly easy to violate these principles, and the results are chaotic, for audience and facilitators.

- *Refining a large amount of input into issues*
  Several methods can arrange group input into digestible issues; the principal one involves a small 'theme team' who quickly extract the key issues from a longer list. For discussion purposes this is good enough. To prepare for voting, a bit more time is needed to edit the group's list for similar concepts, and to refine this down to a set of 12 - 30 items. Additionally, ideas can be categorized in groupings, using a time slot in which the group is conducting another activity. These groupings can then be named, digested and rated against several criteria, however this is another level of abstraction of the data.

Inclusive input

When each individual has the ability to affect the meeting by a method which is as powerful as anyone else in the room, the ground rules change. Everyone now has new accountability, from the shy person or one who only speaks English as a second language, to the leadership of the meeting, who now must accommodate the public expression of opinion from a knowledgeable, diverse and committed crowd. The audience now has higher expectations, because they have been asked to contribute.

- *Level playing field*
  Where input is equal, and the ideas play out without hierarchy or required agreement, there is a much greater possibility of discovering key information on important issues. The level playing field foments understanding of what the group is really thinking, from all the points of experience in the room.

- *Welcoming diverse points of view*
  When the entire meeting can talk at the same time and see all the thinking together, it is the variety of viewpoints that creates the context and the potential in the group-mind. It becomes easier to accept the universe of issues or possibilities. Paradoxically, this context also helps everyone to concentrate on the shared concerns that emerge, even if some do not agree with them.

- Non-threatening participation
  The norm in such a group is to provide thoughtful input. This is a contrast for some cultures to the loss of face in challenging the stated "party line" of the presentation - here, the good of the organization is to have the representative input to use as baseline material for understanding and excellence.

Convergent digest

We view it as critical to winnow the multitude of responses from the large group down to select, summary points for action.

- *Extracting themes from chaos*
  As mentioned earlier, several methods are useful for identifying themes. Theming can be a process of "getting it 80% right", or it can become more involved and analytic. A variety of tools help the group to understand the gist of its input - categories, voting, small group drill-down.

- *Shared priorities*
  By using voting technology, a large group can go through several iterations in selecting its priority issues. Usually this process benefits from clarifying assumptions with the first results and then re-voting with shared definitions.

- *Sharpened focus from the room*
  Whether done prior to the meeting, or during the meeting, the group's ability to see the sum total of its responses in one place helps to bring alignment to the rest of its work. While there are unquestionably multiple agendas in a large meeting, we have seen groups focus without much resistance, once everyone goes through a shared convergent process.

- *Dealing with outlier opinion*
  While convergence is a powerful aligning force, we believe it is also important to address those ideas which lie outside the standard common denominators. By involving the group in understanding divergent points of view, meetings can integrate "prophetic voices" and gain more inclusive and creative solutions. However, these are kept in the context of the overall consensus.

A different leader approach

We recognize that not all leaders of meetings will want to invite this kind of input. A shift in approach is mandated if you contemplate engaging a group in collaborative interaction. Inherent in this approach is the notion of responsibility: that is, you -- as requestor of this input -- must have the *willingness to listen* and the *ability to respond appropriately* to the input you receive.

Once you ask a group for its considered input, it is your obligation to acknowledge the messages you get. Of course, this does not require agreement with them, but it is important to close the loop and give evidence that the information has been heard, understood and considered.

- *Listening means* hearing what the group says and understanding the content in the spirit with which it was communicated. This means NOT viewing it through the lens of what-you-already-decided ("I know you want us to change the configuration, but we can't because a, b and c.") It means leaving your assumptions aside.
- *Responding appropriately* involves feeding back what you have heard, appreciating the input, considering what you would have to do as an organization to fully act on those issues, and then helping the group to digest the totality of their key input. The leader needs to help the group reflect on issues; this includes looking at outlier points of view.

Most of the time, the group will not speak with one voice. There can be two or three discrete points of view needing understanding. We find that many times the entire organization profits from this dialogue when we can help the group understand what would lead someone to espouse a differing point of view. The leader has an important role in accepting and facilitating this, which usually leads to a fuller grasp of issues and potential solutions, and a sense of inclusion by everyone. This then promotes alignment and buy in.

Types of group input

There are many ways to involve a large group in providing input at a meeting. Traditional methods involve a show of hands on an issue, break-out groups reporting back to the assembly, or the use of experiential exercises or simulations.

To these we would add anonymous voting (cards, sticky dots or keypads), group document editing, small group power point presentations, and then - in a quantum jump - collaborative technology.

Collaborative technology, as we use it, involves a number of portable computers connected to the internet (or in-room server), operating within a program so that all individual input can be seen together on a page of combined results. This allows iterative voting, working through successive process steps to refine results, group multi-tasking, etc.

Besides standard brainstorming and prioritizing, we have seen successful use of game-show formats (to promote fun and friendly competition between tables, and to 'anchor' learnings from the various presentations), simulated hand-offs of work from one table "department' to another, multi-team planning simulations (to identify and promote effective virtual team processes), group response to several scenario categories, and sub-team work on shared dependencies (with negotiations between teams.) The combination of technology, group energy and the meeting context can yield many interesting modes for interaction.

Individuals giving input

In smaller settings, the quickest process is to allow more input by each individual, where each person has a separate computer. The amount of input can be controlled through the way focal questions are phrased. If one asks, "what are all the ways we could improve our system of support?" you will quickly get so much input that a theme team will have to wrestle the data into groupings before the larger group can work with it. If you ask for two key issues from each person, you get a more distilled list.

Cadres as input groups

Many meetings work well with a machine for every 3 or 4 participants. Three people can read the screen at the same time, and a triad can usually arrive at some cogent input rapidly, yet benefit from some diversity in viewpoints. Voting can either be by group or by individual. A benefit of this method is the combination of 'trialogue' opportunity - to digest and develop the presentation ideas, combined with a record of the various comments.

In a larger meeting, there should be a theme team of 3 or so objective summarizers, who can quickly review the input in each category and reduce this to major themes. We have seen this work well in a large meeting by having the theme team reflect back these issues as they identify them, and checking this perception against that of the audience as a whole - letting the audience suggest any additional themes they find in the group material.

Tables as input groups

We have conducted a large number of meetings of 100+ members in which each table (of 6 - 8 members) has only one machine. The table groups work as break-out groups, reviewing their material, editing it, and then voting as a table on the top issues from the entire room. This works quite well when there is some time given for group work, in that there is good opportunity for verbal discussion, and many ideas will be already refined by the table group before input. The result is that the "group mind" of the room is not too difficult to read, even when the input has involved perhaps 200 participants.

There is tremendous energy from such an exercise, which requires an appropriate acceptance from the meeting leader. This should take the form of working through an exercise of "making sense" of the input, with an outcome of further action for the final meeting notes -- into a channel which everyone can understand -- for follow up. Here is one example of how this might take place:

We were asked to consider the major barriers to three initiatives we had just begun. Our table worked on one primary initiative, since that was where our expertise and interest lay. We had eleven or twelve issues which we worked on as a sub-group, and we edited these down to 7 major points, which we input into the software. In the room of twelve tables, three other groups also worked our initiative; we also received some material as a secondary step from the customer service tables. Our four tables ended up with 25 barriers to our initiative. During another presentation, a small theme team reduced this to 14 by editing similar input.

At the group review session, the entire room then voted on their top 4 issues from this list, and Wayne - our COO - assigned two of these to teams that were already working on this initiative, and told us that the other two would be addressed at the next e-staff meeting. He has committed to keeping the entire membership of this meeting informed of the progress on each of the three initiatives and the key barriers we raised.

Our table also voted for the top issues on the other two initiatives; similar assignments were made by Wayne and the e-staff for the top issues in these areas. The existing project teams will review all of our group input over the next ten days, by going online to the site where our material is available.

Distinguishing the role of group input

It is important to clarify what the meeting leaders are asking of the group, and what scope of input is expected. There are many kinds of focal questions or feedback vehicles which can be posed to a large group. Do the leaders want many improvement ideas, the top two or three barriers to a new idea, a sense of how much agreement there is on a particular direction, issues that should be broken into work groups? When there is clarity of intent, then the focal question(s) will become easier to craft:

- *"Olympic scoring" of a pre-determined set of initiatives or strategies. This might be stated as one of these:*
  - How are we doing so far on each key aspect or project?
  - How confident are you that this issue will help us meet our objective?
- *Identifying the key issues within several clearly delineated subject areas:*
  - Actions that will help make a strategy develop or succeed
  - Dependencies that other BUs rely on from this team
  - Critical success factors that must be in place for a project
- *Exposing what is missing in the thinking of a core group's presentation*
- *Feedback on our strategy in several key buckets:*
  - Are we (the leadership) getting the full picture of the customer issues?
  - What improvements should we make in our service to you, our customers?
  - What are the unintended consequences of the change we have just outlined to you, the Directors in the field?
- *Using wide stakeholder thinking to identify the barriers or unseen possibilities that may arise, given several possible road maps we are considering.*
- *Deciding on the criteria we should use as an organization, to make choices about… hiring, new product selection, cutting programs over the next year, etc.*

In many instances, a great deal of work can be saved by asking the meeting participants to answer a pre-meeting questionnaire, to help identify the critical issues to be discussed, and to expose everyone to the combined thinking of the group before the meeting begins.

Alignment as a consequence of interaction

We have observed that there are several predictable responses from most large groups where interactive software is used skillfully. These can be summarized as excitement, alignment and heightened expectations.

Once individuals realize that they have a voice in the meeting and they are able to quickly see the overall sense of their peers, their reaction tends to be, "Cool!" We find that small group break-outs generate a higher level of energy than usual when they understand that they have an immediate impact in relation to the whole. Vitality and interest are palpable qualities evident to an observer, which usually remain throughout several days of what can be long and tedious presentation sessions.

Two aspects of working with the combined group intelligence are *norming and alignment.*

- By norming, we mean a natural balancing of disparate points of view toward a number of prevailing themes. This does not mean that opposing points of view are swallowed; rather that everyone goes with the issues that clearly have the most energy for the group as a whole. Within this 'democratic economy' there can still be strong voices of dissent or tangential issues. However, the group will usually have a good feeling about this direction because they have been a part of establishing it.
- *Alignment* comes from the group's ability to directly read the shared focus in the combined comments and voting from many diverse sources. There is a natural focus on issues where everyone has a shared interest. When I realize that others are as concerned as I about specific issues, this raises my interest, my confidence and my curiosity. All of which builds a motivation to act on the shared concerns. This is a very positive outcome for a meeting, even where the area of shared concern may be different than what management expected or wished.

Because of the shared interest, the motivation, the sense of impact from immediate results, groups tend to develop a higher level of expectation for outcomes from such meetings. They typically ask for copies of the group data generated, and they want to see that actions will be taken with the same kind of focus and speed they have generated, to address the issues where they sense such a large swell of shared concern or innovative potential. Hence it is important to build in concrete steps which can be monitored by everyone, so that the sense of urgency and agreement stemming from the meeting is continued. Our experience suggests that many organizations squander this momentum, partly because it takes special planning and partly because the follow up usually requires a less familiar way of conducting business.

The importance of next steps and transparency

Usually these large meetings, called to help manage a change process, spend their energy on the initial orientation to the change and vetting of reactions (at least in the formal sessions of these meetings.) In contrast, a meeting which has the elements of interaction we have discussed can focus more on the shared priorities of the group, beyond initial reactions.

Because of the heightened focus and expectations mentioned above, management should arrange more detailed follow-up activities. As a consequence of the group becoming strongly aligned and motivated by the interaction we have described, members are now involved consumers, and will expect a quick and flexible response, so that the loop "data - focus - action" (which they have now experienced) can be closed. We suggest that meeting owners should plan ahead to provide further data on outcomes of actions begun during the meeting.

Structures for follow up

Follow up can take several forms, such as:

- assignment of specific tasks or initiatives to tiger teams
- listing and working dependencies between groups
- a pre-formatted "dashboard" where all meeting participants can easily get updates as various initiatives continue to be implemented
- a series of follow-up meetings (which can be online rather than in-person) with specific groups of stakeholders who were not present at the meeting.

Collaborative technology can be brought to bear on this process, to enhance access to information and to coordinate responses to it. Leaders need to plan for accelerated data and decisions, and for a more transparent and integrated process. Dynamic tools make it easy for a wider, interested audience to stay abreast of changes and benefit from the motivation that these can create. Key issues to consider here include ease of access, ease of understanding, and ability to provide feedback.

Any structure set up to coordinate follow up should be simple and visible. Someone with seniority will need to drive the coordination and communication, to ensure that individuals remain involved. Lack of attention to published updates by upper management is a kiss of death in this situation; it would cause most participants to revert to daily behaviors which are already required. It would also send a well-understood message: "business as usual, this was just another meeting." In order to support new behaviors by the team, active management interest and dialogue

Transparency

If management has put into place the structure for follow up, then it is desirable to make these actions as transparent as possible, in order to maintain the sense of alignment and heightened expectations for performance. By using mechanisms which build visibility and understanding between functions, and between daily tasks and larger goals, leadership empowers more levels of the workforce to have a sense of ownership. This in turn creates an environment in which people are more likely to take actions to improve their piece of the overall situation (whether that is customer involvement, talent recruitment, service innovation, or teamwork.)

Build an accessible, simple list of key follow-up initiatives, with an owner and a changingindication of progress or barriers for each initiative. If you link each item on the list to a discussion where stakeholders can add comments about dependencies and solving issues, this provides even more transparency. Individuals can subscribe to the list, so that they will receive email notification when there are changes to it; this keeps the sense of progress in the forefront on people's desktops. The important point is that everyone with an interest has one location which will give them ongoing status for the agreed-upon actions that came out of their collaborative meeting.

Of course, it is also more likely that management will get focused questions about what is holding up changes or about barriers to effectiveness! We think this is a good thing. It indicates ownership and continued momentum for positive results, which any leader should welcome.

Addendum - Example Applications

Let's look at how such interaction as we have discussed in this paper would play out in a variety of applications. Here are several short descriptions of meeting types:

Build Connections to Supply or Channel Partners

(In person) Audience of representatives of different partner organizations. Gather table input on How are we doing?, prioritize key table issues as a group. Review lists of: Relationship Areas that are working well, Areas that need attention. Gather confidence votes on specific new policies or

Review Product Strategy for the Next Year

(In person) Audience of internal department managers. Responses to various presentations. Rating of speakers' questions on which products meet the published criteria for "breakthrough products." Work groups develop interdependencies; begin agreement on operating principles.

Key Customer Focus Group

(In person) Each customer representative has a machine for reaction to focal questions. Reactions to new product plans, improvement ideas, dialogue on directions in the industry. Ratings of several product themes vs. the competition. Test the clarity of the market message and the value proposition of the new offering.

Align Several Business Units to Support an Integrated Product

(Remote or In person) Early review of strategy, discussion of resources needed, pre-emptive commitment to not undermine other BU resource needs. Joint development of goal statements in 5 major categories, and anticipated barriers.

Review the Latest Performance Ratings Across a Geographic Region

(Remote) Online meeting to connect a large group of remote managers. Brainstorm to capture synergies for improved performance, rating of just-concluded performance ratings/bonuses process. Development of ideas re: new project timeline.

Build an Initiative Dashboard to Integrate Improvement Processes

(Remote) Ongoing project space for managers and quality personnel for 3 separate plants in a highly regulated industry. Coordination of quality initiatives across boundaries. Consistent application of key improvements and handoffs across all plants. Intended transparency to senior execs.

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