

Maintaining Momentum After a Strategic Meeting

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This article addresses the issue of continuing the energy and sense of ownership that develop during a well-run "big meeting." Speaking to the need for transparency for all stakeholders, it proposes a simple mechanism that can satisfy the need for follow up from various different interest groups.

It appears that there is a certain tragic similarity to the after-effects of many large corporate planning meetings. Agreements are reached, differences are bridged, shared issues are sharply defined and clearly understood. Break-out groups provide detail as to steps which should be followed up. Some follow up actions may be assigned.

And? What usually happens? One or two poor souls go away with several power point decks and muttered encouragement from senior management. If the organization is lucky, these people morph into champions and evangelists, reminding various departments of their agreements and commitments. But they toil in the dark. Perhaps they will publish a long and involved email in two weeks, or perhaps six weeks, and announce a program in three months. More likely, most conference participants will hear very little from them ever again.

We propose the use of a simple follow up mechanism, in order to maintain both the energy and the sense of ownership that have developed during your meeting. Because it is something new, it must be easy to do. Because information is changing, it needs to reflect real-time status. By publishing ongoing status, everyone can feel involved, even if they are not directly doing the work.

The vast majority of participants have energy and motivation for follow up actions, but day-to-day requirements quickly seep in to take up most attention. One might hear comments like, "The same thing always happens at these meetings. It was good to talk over such-and-such issue in the hallway, but I don't think we'll see much change." What is needed is a way for them to maintain their enthusiasm, and be able to view ongoing progress on the issues.

As consultants, we hear many calls for transparency, for cross-team involvement, and agreements on the importance of continued communication. What happens to these desires? Where is a vessel for all the energy generated by the important work done in the meeting?

Central Information on Initiatives

We suggest that in many cases, organizations at this juncture will benefit from a central mechanism that provides ongoing information about the main initiatives or task forces that are set up during the meeting. This mechanism provides:

- Communication to all parties
- Universal access (transparency)
- Simplicity
- Status updates
- A way to identify bottlenecks to stakeholders
- An archive for key decisions, schedules and documents.

While this could become quite complex, we believe the key to the idea's success is in extreme simplicity, so that it does not tax anyone's resources to maintain this mechanism over time.

Stepping out of the 'known'

When such a central follow up step is suggested at the conclusion of a large meeting, we get knowing nods, pursed lips, and statements like, "Yes, good, we'll see." We have to wait 'til we see what the COO thinks, or until the next e-staff meeting, until someone else will take "the monkey on his or her back." The problem is that we are asking for a change in how the system operates; this is the unknown -- an uncomfortable place for an organization.

There is not usually resistance to the idea of follow up tracking; rather there is trepidation about the who and the how. There is usually no precedent to help bring the idea to practical consideration. So it becomes a good idea, but it is not going to happen.

But wait...

- Post a list of key objectives
- Link these to a list of critical tasks
- Assign an owner to each of these, with a projected delivery date.

These are standard management activities.

- Publish this on the web, where everyone can see it
- Show real-time updates (percentage of completion)
- Show warning lights when certain criteria are present.

These are simple things that standardize the management tasks above, yet they are not 'standard' because people haven't usually had a way to do them. But they are very simple.

There are additional steps that can and should be taken. These require a bit more work - and perhaps should wait until the first, simple piece becomes comfortable:

- Provide a documents library
- Provide a linked discussion space for each project where the team can list issues and keep simple meeting notes (who, what, when).
- Create agreements on brief monthly status meetings, to review objective.

Effect of Publishing Results

Look at the effect of making these lists available to all the people who have a stake in the outcome of those issues -- these pressing needs that were so hotly debated at the big meeting. Now, people can see that their issue is receiving attention, that it is moving forward. They can see over time what conflicts it may run into against another initiative. They can suggest a resource when they read that a snag has occurred.

But mainly, they see whether there is progress. They see that something specific is ongoing, even though they are no longer immediately involved. They have a feedback mechanism. They know that the meeting's purpose is being moved forward in the organization. They will be much more motivated the next time they are asked to participate in another planning meeting.

	Task	Owner	Due	Started	Progress	Stat	Comments
1. 🪄	Dedicated revenue manager		1-Aug-05	<input type="checkbox"/>	<div style="width: 20%;"></div>	🟡	Issue w whose budget this comes from. Robin/Richard to talk to Solomons
2. 🪄	Assign hotel champions	E.Cameron	15-Mar-05	<input checked="" type="checkbox"/>	<div style="width: 40%;"></div>		
3. 🪄	Arrange IT support	S.Buddle	1-Mar-05	<input checked="" type="checkbox"/>		🔴	Conflict with GIS project. Requires VP intervention.
4. 🪄	Train Holidex to different level			<input type="checkbox"/>			
5. 🪄	2 accredited tools – HIRO + 1		1-May-05	<input checked="" type="checkbox"/>	<div style="width: 60%;"></div>	🟢	
6. 🪄	Simple business training as part of RevMgt training	D.Hinds	1-Jul-05	<input type="checkbox"/>			
7. 🪄	World's best people setting up systems		15-Sep-05	<input type="checkbox"/>			
8. 🪄	Training levy to fund training and trainers		10-Jul-05	<input checked="" type="checkbox"/>	<div style="width: 30%;"></div>		
9. 🪄	Proper multilingual training and materials,			<input type="checkbox"/>			

We have also observed that everyone likes to get their boxes checked off. If there is a red light, there is lots of energy to make changes so that that light can be turned green. A team list is a powerful motivator for follow through, especially if others are watching, and commenting on outcomes. The list itself becomes at once an alignment mechanism, a measurement tool and an incentive.

Isn't this the behavior and the transparency that everyone wishes for after such a meeting? Clear statement of objectives, shared knowledge of dependencies, published updates on status?

To us, this is a big win all the way around. Senior management has a dashboard showing progress, the teams have central access to up-to-date information, the stakeholders have a view into the follow up actions from the meeting. And, with only a little effort on each owner's part, it is self-perpetuating.

The **critical success factors** are these:

- Sponsorship and support by senior management
- Group knowledge of and access to the online location
- Clear assignment of owners for individual tasks
- Owners update their task's status regularly
- Regular review of status and interdependence of these tasks.

If these critical factors are supported, if the tasks that are monitored are important and not too general, and if senior management removes

barriers as they arise, then this type of publishing and review can create powerful momentum for the work that was done in the strategic meeting. It gives all participants a continued sense of the value of their work together, even if they are no longer involved in the daily execution. It provides a tangible sense of progress to the larger enterprise.

The critical factors listed above are not that difficult to accomplish. The cornerstone of this mechanism is the attention and support of senior management. If this is present, and someone with clout is assigned to drive the regular status review, then the rest of the issues will be relatively easy. And we believe that by making the action lists and therefore, the review, simple and straightforward, it is that much easier to attain the senior level support, because very little time will be required, and what energy is expended will be on resolving important barriers to making the initiatives successful.

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