Covision

The Future of Convening Communities

Everyone engaged. All perspectives heard. Building real alignment and ownership.

We help you create collaborative and productive meetings — no matter how large your group, or where they are located.

Covision Collaborative Meetings

We ensure that your group—whether 15 people or 3,000, whether in the same room or in numerous rooms around the world—reaches the highest levels of understanding and agreement in the shortest timeframes. We know – that's a tall order. But in fact, it's entirely possible.

For the last 20 years, this meeting design methodology has proven effective in accelerating understanding and alignment, getting "all brains on deck," and tapping into the creative thinking of all participants.

"Covision created a level of engagement and trust that would have been very difficult to achieve in any other way. We simply could not have moved our work forward so quickly and transparently without this amazing methodology."

Nancy Fishman,
Executive Director Grand Victoria Foundation

Our Meeting Design capabilities include:

Helping design the appropriate flow of presentations, small group discussions, whole group interactions and voting rounds to best support collaborative thinking and solution generation.

Choosing and customizing engagement technologies that will help you seamlessly have small-group dialogue, capture everyone's ideas, and hold votes with the whole group—no matter their location.

Coaching presenters and leaders on how to create a conversation that includes the perspectives of all the participants.

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Collaborative Meeting Formats

Format 1: Face-to-Face

When it's time to bring everyone together, the Covision Methodology allows getting the absolute most out of the opportunity (and your investment). In this way, you can tap into the wisdom of the group, find areas of agreement, or find other areas that require deeper or broader discussion. Alignment comes naturally, easily.

Format 2: Multi-site

When time and money spent traveling to one site makes holding a large face-to-face meeting unfeasible, the Covision Methodology can be used to engage participants effectively in a multi-site meeting. With good design and technology support, the experience can feel close to that of everyone being in the same room. A few sites, or dozens around the world, can operate as one efficient, effective large meeting.

Format 3: Virtual

Often it is impractical to bring participants or stakeholders together at all. In this case, you have another strong option: a 1-2 hour virtual meeting (or a series of them), using the Covision Methodology. Significant travel costs are avoided while you provide a powerful platform for collaborative thinking and planning. It is especially effective when all participants are already familiar with each other – it is easiest to move quickly to key points and dive deep as appropriate, in the shortest time frames

Covision has over 20 years experience in designing and supporting large Collaborative Meetings and Summits. We have helped organizations like...

- AmericaSpeaks
- Annenberg Foundation Trust at Sunnylands
- Clinton Global Initiative
- Corporation for National Community Service
- Council on Foundations
- Cowell Foundation
- Democracy Fund
- Livestrong Foundation
- Marguerite Casey Foundation
- New American Foundation
- Open Society Foundation
- United Nations Foundation
- United Way Worldwide

... to build alignment, create shared agendas and identify creative actions.

"We had this challenge of wanting to bring together many participants coming from different backgrounds and have them start thinking about what the future world would be in terms of relationships between humans and nature. We chose to work with Covision, even though in the science world, it's still extremely difficult to use conversation-based meeting methods. But it's improving, and more and more scientists are now aware of these new ways of doing meetings. All of the participants whom I talk to in the following years told me it made a change, a major change, in their way of thinking, and I would say in their way of working, in their life."

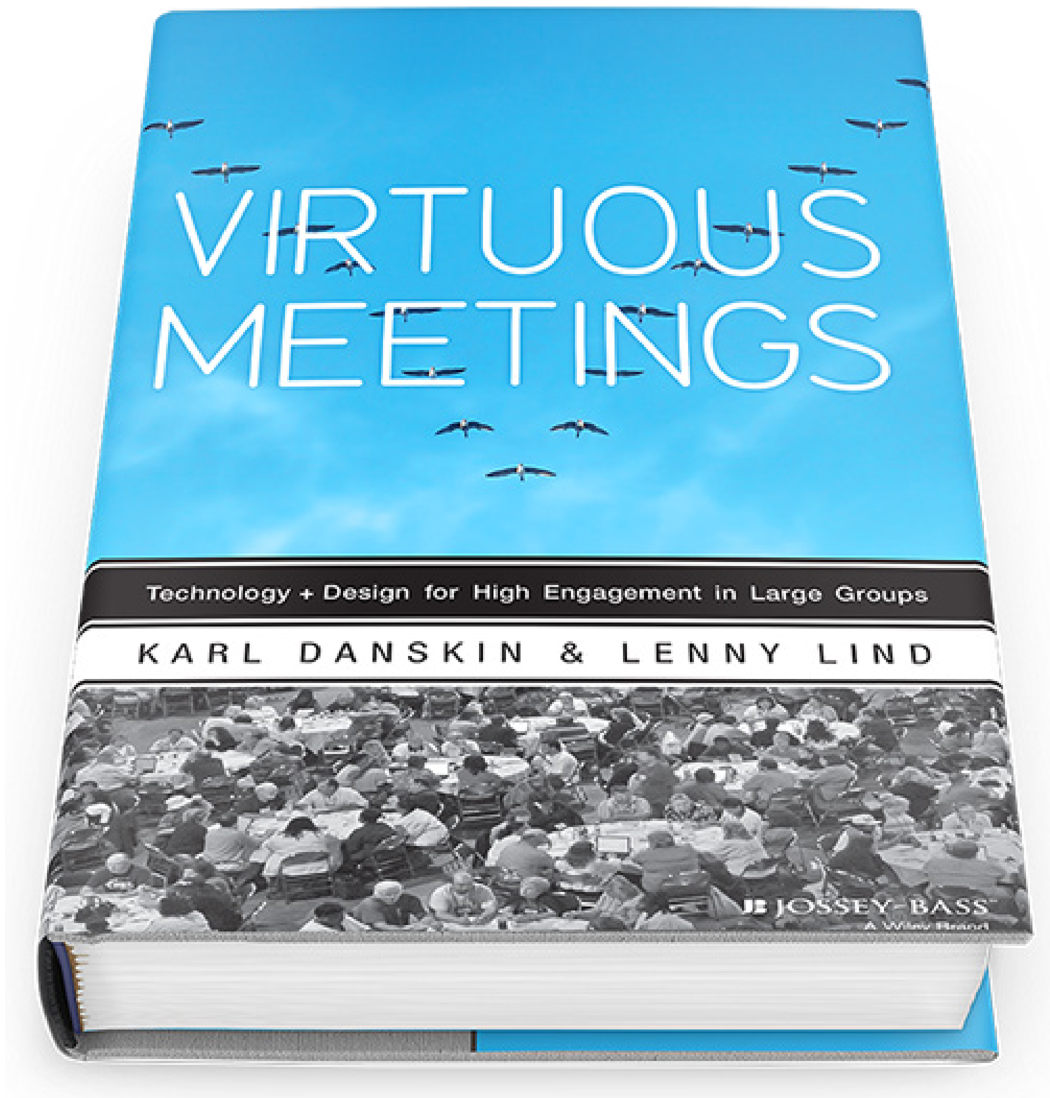
Estelle Balian
Belgian Biodiversity Platform, Director of International Positive Visions For Biodiversity Conference

Covision

The Future of Convening Communities

Enjoy chapter one of our book Virtuous Meetings

Technology + Design for High Engagement in Large Groups



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VIRTUOUS MEETINGS

Technology + Design for High Engagement in **Large Groups**

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CHAPTER ONE

REALIZING VIRTUE IN LARGE GROUP MEETINGS

The concept of being virtuous is as old as the oldest civilizations, from ancient Egypt, where the goddess Ma'at instilled principles of truth and order, to Lao Tzu's enduring Chinese classic from the fourth century B.C. *The Tao and Virtue*, to ancient Greece and Plato's Cardinal Virtues. As our ideas about morality, order, and justice have evolved, the notion of doing right and caring for others has remained as the implicit "goal" of many of these efforts. Essentially, being virtuous is doing good—toward someone, some group, or some thing. Part of the meaning of virtuous in "virtuous meetings" is about the intention to do good, for the participants, for the leaders, and for the larger endeavor of the organization.

Another meaning has to do with cycles. From a holistic perspective, when certain activities occur and recur in cyclical order, they either create accumulating positive results or accumulating negative results. When each successive repetition of the cycle increases the desired outcome, then it is referred to as a "virtuous cycle." Virtuous large group meetings are designed as a series of cycles, and the trust and engagement of the participants increases with the completion of each cycle. Virtuous meetings are virtuous both in their intention and in the format or configuration with which they are run.

During the last thirty years, virtuous cycles have been identified in a wide variety of fields: management, medicine, education, IT, diplomacy, psychology, and macroeconomics, to mention just a few. The identification of virtuous cycles arose as a response to the widely held notion of vicious cycles. "Vicious cycle" is practically a household term.

Most people know, for example, the idea that "homelessness is a vicious cycle." When we look at a cycle, it is easy to see if the results lead to a downward spiral, and if the cycle keeps reinforcing that downward trend. But it is becoming more widely appreciated to look for the cycles that are spinning upward, in which positive results from each stage of the cycle lead to increasing positivity as the progression continues. This is where we see the enduring value of virtuous meetings.

But can a *meeting* be virtuous? We believe that it can. Meetings are about people wanting to connect with other people, and there is no greater virtue than this desire to connect, create, and share. Virtuous meetings are about people. The best intention at the heart of every meeting is to connect people—across functional groups, departments, states, vast differences in mind-set, countries, and time zones. The real virtue in a large group is being able to let people talk to each other and share their insights, feelings, and ideas.

In the Virtuous Meeting Cycle (Figure 1.1), everything begins with full engagement. When all of the participants' voices can be heard, then there is the possibility to build a shared understanding within the whole group. When participants use shared understanding, as a group, to generate plans and solutions, they have a sense of

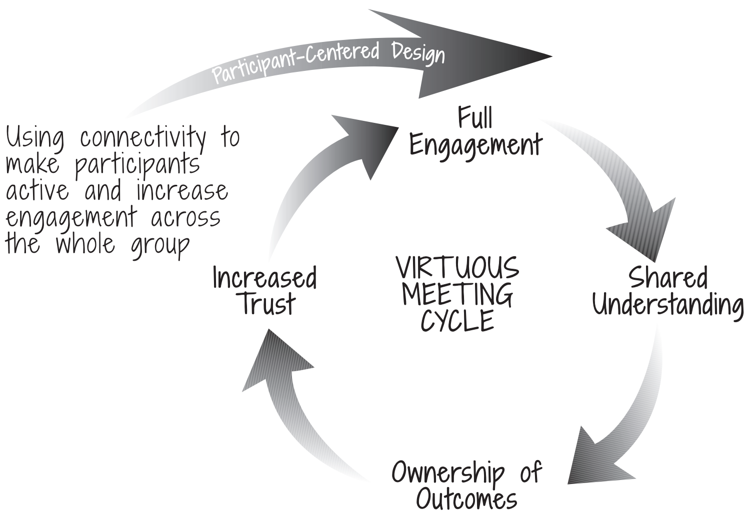

Figure 1.1 The Virtuous Meeting Cycle

ownership of them. As the participants, and the leaders, see the value of the outcomes of their interactions, their trust in each other, in the process, and in the intention increases. With an increase in trust, the engagement can become even fuller and more robust. And in this way each revolution continues upward . . .

In the past, it has been assumed that success in the competitive world requires control of information and a single point of view in execution. But to survive and thrive in the future environment, organizations will have to find ways to harness and leverage the experience, knowledge, and creativity of their people.

In the past, resistance to designing highly interactive meetings using high-speed connectivity has been based on unfamiliarity and unreliability of the infrastructure and a fear of losing control. This has given way to an urgent need to utilize new methodologies and thus accelerate and widen communication—a factor now seen as essential for survival.

Three trends have converged to create the “wave” of demand that we are now seeing for high-speed connectivity in meetings:

1. The technology enabling these methodologies, and the infrastructure to support it, keeps improving every year and has become increasingly ubiquitous.
2. Members of organizations have a proclivity for using the infrastructure; they already use it to offer their insights, experiences, and evaluations in their daily life, and they want and expect to have those opportunities in their work life.
3. The environment in which organizations operate has become increasingly complex and the rate of change in the environment has greatly accelerated—diminishing the value of top-down planning and increasing the need for cross-functional, interdisciplinary collaboration.

THE VIRTUE OF COLLABORATION

Before turning our attention to new ways of designing and conducting large meetings, let’s entertain a more virtuous vision for the future of today's organizations. What kinds of experiences and outcomes should we aim to create in large meetings?

Organizations operating in today's environment are under great stress to be competitive. But maintaining a competitive edge no longer means being able to simply "ramp up" production to meet an increasing demand in the market. Rather, being competitive requires being innovative, integrated, and nimble. Amy Edmondson, Novartis Professor of Leadership and Management at the Harvard Business School, in her book *Teaming: How Organizations Learn, Innovate, and Compete in the Knowledge Economy,* frames the nature of what organizations are facing:

> In today's complex and volatile business environment, corporations and organizations win or lose by creating wholes that are greater than the sum of their parts. Intense competition, rampant unpredictability, and a constant need for innovation are giving rise to even greater interdependence and thus demand even greater levels of collaboration and communication than ever before.[1]

Her research shows that a legacy dependence on command-and-control processes has become ineffective in an environment where certainty and predictability have given way to uncertainty and rapid change. She demonstrates the counterintuitive lesson of our times—learning has become a more critical objective than execution. Surviving and thriving is more dependent on how you work together, and learn and innovate together, than on finding any "right" formula and "cascading it out" to everyone in the organization. Collaboration and communication need to take place everywhere throughout the organization.

> "The value of your organization is not the individuals, but the way the individuals work together. Companies are competing with each other on the basis of collaboration."
>
> —Professor Lynda Gratton, renowned author and professor of management practice at the London Business School.[2]

One example that illustrates this principle of collaboration comes from our work with a particular client who is in the enviable position of having an industry-leading pipeline of new products coming out in the next few years. And while this is a great problem to have, it is still a very real problem. They are realizing that in order to successfully bring this volume of products to market, they will need to reinvent their development process. And they see that this can't be done solely from the top down, or with a single new process design. What it will take is fostering innovation at every level in the organization. Everyone in the organization needs to be stimulated to find innovative new solutions to how the work gets done.

That's a fairly steep hill to climb, but it is not unusual today. In addition to resources and direction, many organizations are identifying other elements that are essential to their success within their environment. These needs include flexibility, speed, flattened decision making, innovation, and ownership.

Another recent client, a large manufacturing organization, put out five attributes—goals they had to reach as a culture. The goals were to become more Innovative, Agile, Reliable, Efficient, and Inspired. One of the things that all of these aspirations have in common is that they aren't just aspirations for greatness; they are aspirations for survival and competitiveness. In other words, they are not nice-to-haves, but essentials. Edmondson points out that in an environment where "knowledge is a moving target," being able to learn new skills has become a competitive imperative.[3] Not only is the knowledge a moving target, it also resides in many different individuals. Edmondson is arguing that the act of "teaming" is essential and that it is not just one individual who has to learn the new skills, but groups or teams of individuals. The need for self-awareness by these teams is very high. They have to be able to form quickly out of the broader group, do their work, disperse quickly, and reform again. The whole group, or organization, has to become more self-aware. As Lynda Gratton puts it, "What's important is not what is inside each mind, but what is in the space between the minds."[4]

Furthermore, while all the aspirations have to be embraced and endorsed from the top, they are dependent on the attitudes, beliefs, and behaviors of each person in the organization. You can't *tell* someone to be innovative or inspired. It's a nurturing role, rather than a managing role.

Leaders can provide an environment for these competencies to take hold, but they can't execute the transformation. The whole organization has to do the heavy lifting. Every member of the organization, including each participant at your meeting, is critical. Even more critical is how they *work together* to build the future.

THE VIRTUE OF ACTIVE CONTRIBUTION

A virtuous meeting is, in simplest terms, a meeting in which the participants are active contributors to the direction and the outcomes of the meeting. Rather than being passive members of an audience, participants are engaged in frequent small group discussions, which are captured, synthesized, and shared with the whole group, and then responded to by the leaders. The organization gets the full value out of every person in the meeting, and the meeting is stimulating and engaging for the participants.

What It Means to Be an Active Contributor

First, let's define what we mean when we say *active contributor*. If the participants are *active,* they are processing what they hear and explaining it to others. They are brainstorming and evaluating. They are presenting their own ideas, and listening to others present theirs. They are actively thinking about the presentations they've heard from the stage and how those presentations fit into the context of their own work and role—and sharing those thoughts with their peers.

The vehicle for an active participant role is the small table group conversation. When there are only three to eight participants in the group, they naturally all become active. In a small group, it's possible for each person to get his or her perspective out on the table, to examine the differences and the similarities between the positions, and to start to brainstorm new solutions that accommodate everyone's point of view and experience.

Active—actually participating in give and take conversation over a period of time (not just asking someone in front of the room a question).

If the participants are *contributing,* the content of their active conversations is informing the group. In practice, the key ideas or reactions or questions that the participants are having in their small, active conversations are getting communicated to a specially tasked team that reads through all of the input. The fruits of the collective small group interactions are synthesized and then presented back to the whole group. Thus, the leadership and all of the participants have a real-time window into what everyone is thinking and how they are feeling.

Contributing—when the content of a participant's active conversations is somehow informing the group.

One way to think of these small group conversations is that they are "micro-breakouts." They are much smaller than usual breakouts and last anywhere from five to twenty minutes, and they occur frequently during the day. Because they take place right at the tables in the plenary, it doesn't take the participants any time to get into them or to get back from them. The groups are small enough that everyone gets to be active in the conversation the whole time. The "reporting out" happens through a synthesis process, and it can be presented back to the group quickly.

What Active Contribution Looks Like

View from Inside a Meeting

Visualize fifty tables with six participants at each table in a large meeting of top leaders of a global organization. The room is

(*continued*)

(*continued*)

buzzing; every table has a lively dialogue, with participants taking turns jumping into the discussion. The topic they're wrestling with is critical to the future of the organization. There are tablet computers at each table, and folks are tapping the screens quickly while the discussion is raging. Someone on stage begins calling the group's attention back to the front, and the buzzing slowly subsides. The person on stage, a senior vice president, says, "That *felt* great! What energy! Thank you. I can't wait to see what you've come up with. Can we see the themes now?" A moment later a list of seven statements, or *themes,* is shown on the big screens for all to see. She takes a moment to look over the list, while the whole room does the same. You can hear a pin drop. In another moment she begins addressing the themes, which have been distilled quickly from the hundreds of comments participants entered into the tablet computers. As each of the seven themes is read, the group recognizes a truth about their current situation. And the VP takes a little time with each one, focusing her own spotlight on it, and telling the group what it means to her and to the organization. It's as if a mirror has been raised to the group, and they get a deeper view of who they are and what their collective situation is—a view that is normally not available.

In its simplest form, someone will give a presentation about the topic from the front of the room. Then as soon as the presentation is over, participants will be given one or two specific questions about the topic to discuss. The participants will turn to the other people at their table and get involved in discussing the answer to the question(s). As they talk, one of the participants at the table will record the responses that they come up with into a laptop or tablet.

All of those responses, or small group thoughts, are captured in a structured database. Somewhere in the room a specially tasked group of between two to eight people from the organization (depending on the size and purpose of the meeting) read through the groups' input in real time and synthesize what's coming in from all of the different table group conversations. While the rest of the participants are talking, this group is "listening" to everybody. This synthesis is like an executive summary and usually is captured in eight to ten bullet points.

This synthesis is shown to the larger group so that they can see what the whole group was saying in answer to the question(s). Then the person (or panel) in the front of the room has the opportunity to address the ideas and concerns of the group directly in the moment. After the meeting all of the small group input can be revisited and reviewed, so that the more varied and detailed aspects of the groups' input can also be addressed.

THE KEYS TO CREATING A VIRTUOUS MEETING

Creating the environment, spirit, and process for a virtuous meeting requires two keys and one overarching goal.

The Goal: Convergence

A crucial point to remember is this: In large, important meetings, you are making the participant an active contributor not just for the sake of the participant, but also for the sake of the organization or, in the case of multi-stakeholder meetings, for the stakeholders as a whole. The goal of the meeting should be *convergence:* integrating the thinking, experience, and passion of a broad range of people to create a mutual way forward. Convergence is the outcome that makes a virtuous meeting virtuous by creating a whole (in solutions, strategies, implementation) that is greater than the sum of the parts:

- You create conversations that would not otherwise have existed
- You make information available that wasn't before
- You incorporate the myriad perspectives and realities within the group

- You make contributions productive and focused on the needs of the group
- You build a new level of trust within the group
- You give leaders better visibility to the realities within the group
- You make the group smarter: foster learning and awareness versus assumptions and stereotypes
- You keep the meeting experience engaging, energizing, and focused

Convergence—integrating the thinking, experience, and passion of a broad range of people to create a mutual way forward.

The Keys

The chapters that follow will examine two keys to achieving convergence in large group meetings:

1. A participant-centered approach to design and facilitation
2. High-speed connectivity that makes the content of many small conversations visible to the large group

A virtuous meeting in which convergence occurs is one in which each participant's thoughts are captured and translated into a team sense of alignment, and then catalyzed into collaborative, focused, and efficient action. The meeting becomes more of a design thinking experience for both the participants and the conveners. Rather than passive consumer participants and active leaders/presenters, the two groups work together to design solutions that work for the whole. Thus, participants who are "end users" of the strategy are invited to give input and ideas to influence the designing of the strategy.

The barrier to convergence in normal large group meetings is that no one knows what anyone else is thinking. And even more important, because there is no opportunity to digest and process what they are taking in, many are unsure what they themselves are thinking.

Opening the doorway to convergence requires two keys. First, participants must process the topic and come up with their own ideas and feelings. This can only be done efficiently in small groups. This is the heart of the participant-centered approach. Second, participants and conveners need to know what the major trends are from all those conversations. This can only be done efficiently with networked technology and a well-designed synthesizing process.

You have to have both the small group conversations and the tools and processes to "digest" those conversations in order to be able to use large group meetings to create and converge. Without both parts of the process, large group meetings fail to be productive and become by default informational, and the only opportunities for the real conversations are "on the side" or at the breaks.

HOW LARGE MEETINGS HAVEN'T CHANGED

How much have large meetings changed in the last thirty years? On the one hand, you could say they've changed a lot: thirty years ago there wasn't PowerPoint; wireless microphones were a revelation; registration was done by hand; and participants were looking for telephone booths, not Wi-Fi access. But the most critical elements about the meetings have remained unchanged:

- The reason for holding the meeting
- The roles involved
- Who is invited to participate
- The time frame
- The format

The fundamental format of meetings hasn't changed very much at all. They are front-of-the-room-centered meetings: a group of people is assembled and a few people speak while most of the group sits and listens.

Most large organizational meetings (for example, the ones that include extended leadership teams from across the organization)

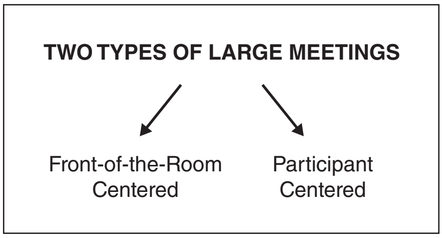

Figure 1.2 Two Types of Large Meetings

take place over one or two days in a large ballroom at a hotel or other venue. Most of the meeting time is taken up with presentations from the stage, backed by PowerPoint images. At the end of each presentation there may be a few minutes of open Q&A with microphone runners stationed around the room. The presenters include senior executives, motivational speakers or experts, and sometimes panels of executives or other experts. Often the group will go into breakouts for an hour or so and then come back into the ballroom and deliver report-outs, sometimes accompanied by hand-drawn flipcharts.

Meetings like this take place every day, all over the world. This front-of-the-room-centered format is a legacy. It is a holdover from a period when it was the best solution to an historical predicament: organizational leaders realized it was important to have a large group gathered face to face, but the size of the group made it impossible to have everyone speak up and talk with each other. Since the individuals couldn't talk to each other, or to the group, they were treated as an audience. Everything was communicated in one direction, from the stage to the audience.

Over the last thirty years, there has been significant work on particular designs for making large meetings more productive and inclusive. We will look at the roots of this new type of design, participant-centered design, when we discuss large group methods in Chapter Two. But outside of the use of these specific large group methods, the format of large meetings has remained static (Figure 1.2). There is a default norm for large meeting design that centers on presentations, panels, Q&A, and breakouts.

This front-of-the-room-centered norm is so pervasive that it has become unconscious. People in organizations who have to put

	Front-of-the-Room Centered	Participant Centered
Goal	Informational	Convergence
Participant Experience	Large group experience (plenary)	Large group (plenary) and small group discussion (table group)
Participant Role	Passive audience member	Interweaving of audience member and active contributor roles
Activity	Listening	Listening, discussing, processing, contributing
Outcome	Heard presenters' messages	Alignment, Ownership

Figure 1.3 The Way We Meet versus the Way We Want to Meet

together a large meeting don't think, "Let's do the norm!" They just do it. Most of the time they don't think about it at all, but just do what they've always done. For these people, the notion of a presentation from the stage followed by a brief Q&A is really more than a "norm": it is their only conceivable option. *Virtuous Meetings* will propel us forward, showing us that we have access to the virtues and ideals that we have been wishing we could embrace all along. We'll first look at the fundamental differences between the way we want to meet (virtuous meeting) and the way we have been conditioned to meet (front-of-the-room-centered meeting) (Figure 1.3).

Today, a front-of-the-room-centered design is still considered by many to be the best way to organize a large group gathering. This book focuses on a better approach to these important meetings—an approach that integrates the thinking, experience, and passion of all of the participants in order to create a shared way forward.

When Convergence Is Unattainable

You can't have a meeting if no one is there. But in many meetings, the world over, the participants are not *there*. They may be in the room, sitting in their chairs, and perhaps even looking directly at the person speaking at the front of the room who is leading the meeting. But where they really are is back at their desks, working on a project that the meeting interrupted, or back at home, or on the beach. . . . They are not *in* the meeting because, frankly, the meeting barely includes them. Despite the amazing progress we have made in organization development around teaming, collaboration, and shared leadership, we are still conducting large meetings "from the front of the room," with little or no participant engagement. We are missing the virtues of coming together, not just to create rituals of belonging, but also to create processes for how we will work, evolve, and progress.

There sometimes comes a moment in the afternoon when you are sitting at a meeting and you realize that you cannot stay awake. You are in the middle of a group of people, perhaps many of whom you know, so you can't *really* fall asleep. But try as you might, there's nothing you can do to stop it: the fateful moment comes when your head drops and you catch it and use all your might to lift it back up and try to focus on the PowerPoint slide up in the front of the room.

Let's look at something completely different that may be similar: traffic congestion. The estimate for the cost of traffic congestion is $87 billion a year.[5] That's the cost of having people sitting in their cars, out on the highway, waiting to go somewhere. That's an incredible sum of money in lost productivity—$87 billion in the United States alone.

And what is the cost in productivity for meeting participants—sometimes the highest paid people in an organization—to be sitting in a dark room somewhere fighting to stay awake? The cost to that organization is enormous. Not only is all of the cost for staging, traveling, and feeding everyone lost when the participants lose interest, but also the cost to the organization of having those leaders out of work is critical. And those costs pale in comparison to the cost of the lost opportunity: the opportunity to catalyze critical members of the organization into embracing a more collaborative and productive way of working together on a large scale.

Many large organizations are stalled. They aren't growing and innovating enough to realize a robust and expanding future. Many governance processes are stalled, and inevitable, slow worldwide catastrophes are not being addressed because the many stakeholders can't find a way to generate inclusive solutions. Everyone is present, but it is as if they are all in some transcendent traffic jam, unable to move even though they know they need to.

Large group meetings are a reflection and a symptom of that giant traffic jam. Large organizational meetings, even at the highest levels in the organization, don't reinforce collaboration, speed, and open innovation. Large multiple-stakeholder meetings, even though their purpose is to create inclusive solutions, don't provide a means for the stakeholders to work in a truly generative mode, together, in real time.

A New Design Choice

An intuitive assumption for most people is that the difference between a small meeting and a large meeting is that one is participant centered and the other is front-of-the-room centered. In other words, whether to design a participant-centered meeting or a front-of-the-room-centered meeting isn't a choice that designers have. Rather, it is dictated by the size of the group. Without the new high-speed connectivity, this is largely true—particularly the larger the meeting gets. The option, or choice, to have a *large, participant-centered* meeting is made possible by this new connectivity.

What Do We Mean by "Large"?

Before we go further, we want to address a question we are frequently asked: When exactly does a meeting become "large"? Here's what we've learned: Once there are too many people for everyone to have a chance to contribute to the discussion, and once there are too many people for the more introverted members of the group to feel comfortable speaking up, then a meeting has become large. A large meeting, conducted in a traditional way, is characterized by many of the participants not participating in any active way. Instead, they are merely passive listeners for most of the meeting.

Even a ninety-minute breakout with forty or fifty participants is generally too large for a lot of the participants to be active. Half of the people may get to contribute to a discussion, but half of the people will remain inactive and silent. "Large" isn't defined by a specific number of participants. Rather, large is defined as the point at which the size of the group discourages or prevents active contribution for many of the participants.

To illustrate the relative nature of defining a large meeting, consider how time is a factor. How long the meeting lasts can affect how large it feels. If you have fifty participants for three days, most all of them will get to contribute over the course of the three days, and the meeting will not seem particularly large. But if those same fifty people are only going to meet for three hours one afternoon, then many of them probably will play a mostly silent, passive role, and it will have the feel of a large meeting for them.

Large (meetings)—the point at which the size of the group discourages or prevents active contribution for many of the participants.

SEEKING ALIGNMENT

Why do organizations have large meetings?

One reason is to bring people together face to face. In most large organizational meetings, the participants gather together in person only once or twice a year. That is the only opportunity to viscerally feel a part of this group, and for this group to have a sense of identity. Actually being physically present together is the best chance the group has to feel like a working team—to set aside their own individual viewpoint and realize that there is a collective viewpoint that is the sum of all of many real individuals present in a room: individuals you can see and touch, with whom you can shake hands and have conversations.

The other reason is that these meetings serve as *communications events*. They are the vehicles for disseminating the view from thirty thousand feet. They are opportunities for the leadership to throw a sharp focus on the things that need to happen throughout an organization during the coming year.

Because it is handled as a communication event—regardless of whether it's the annual leadership conference, a strategy summit, or even a merger integration meeting—everyone knows it will be about the participants receiving the leadership's point of view. They know it will be about everyone receiving that same point of view *in the same way*, and taking it away with them to focus their actions. The desire is for alignment and the process to produce it is to have everyone hear the same presentation, from the same person, at the same time. In the end, this type of process does produce an *aligned message*, but not an *aligned group*.

Alignment and Communication

Communication is most effective when it is interactive: when everyone involved has an active role. This is obvious on a one-to-one level, but it tends to get overlooked or dismissed as impossible in designing large meetings.

For example, if a manager is intent on changing an employee's way of looking at something, she will be much more effective by presenting her view and then soliciting the other person's thoughts in response to it. Then the manager can weigh those responses and try to provide more context, data, or insight to address whatever part of the picture the employee is struggling with. Maybe there are things that the employee tells the manager that cause the manager to change certain details of her view as well.

This same process will also work if she sits down with three of her direct reports at once. Going into the conversation, she doesn't really know what they are thinking, how they are feeling, or what they will say. She may have her hunches and her assumptions, but she has to have a dialogue with them in order to effect any change in how they are looking at things. Not only does she want to share with them the direction she thinks they all need to go, but she also wants to hear from each of them and respond to what they are saying.

When we do this with thirty people, the interactive communication becomes complex, and the manager or executive must have good facilitation skills. Even then, with a group of thirty, it takes some time.

When we do this with three hundred people, most managers and executives believe the task is impossible, and they feel forced to turn away from interactive communication. When three hundred people are in the room, everyone—participants and leaders alike—believes that the participants have to play a passive role. We all believe that the only ones who can be in an active communications role are those standing in front of the room holding a microphone. By default, everyone else's role is reduced to listening.

Virtuous meetings, at their core, are about the difference between an active role and a passive role for the participants. Are participants in the meeting going to be active contributors or merely passive listeners? The answer to this question is the fundamental point of leverage for any organization or multi-stakeholder group that wants to extract the maximum value out of a large meeting.

THE HABIT OF CREATING PASSIVE AUDIENCES

What do we mean by a passive role? Very simply, the participants are inactive. They can listen, but they can't talk. They have no opportunity to contribute. They don't know what anybody else is thinking about what is being said. They may not even have a clear sense of what they think or feel about what is being said, because they have no opportunity to digest what they're hearing. They are just listening and taking things in, as much as they can.

By contrast, an active role means the participants are *contributing*. They are listening at times, but they are also processing what they hear and explaining it to others. They are brainstorming and evaluating. They are arguing for their own ideas and listening to others' ideas. They are actively thinking about how the presentations fit into the context of their own work and role and sharing those thoughts with their peers. By means of this active role, the leadership and all the participants have a real-time window into what the participants are thinking and how they are feeling.

The Confusion about "Passive-Audience" Style Design

What does the passive role look like in a meeting? Listening to presentations is the most obvious (in)activity that comes to mind: 175 participants sitting in a darkened ballroom listening to a PowerPoint presentation on the stage. However, that is only the starkest example of the passive role. Perhaps because it is so stark, other examples seem "active" by comparison. That's the basis for a lot of confusion in large group meeting design. Many (in)activities that designers use to create an "active" role for the participant are just as passive as listening to a presentation from the stage.

Activities That Create a Passive Experience

Let's look at some classic examples of activities and processes that are considered alternatives to straight presentations and evaluate them from the active/passive perspective. We need to keep in mind that the active role means that participants are talking, thinking, debating, and contributing to the knowledge and awareness of the group.

Q&A. Although this often appears as "Group Interaction" on an agenda, it casts almost all of the participants in a passive listening role. Except for the person who has actually asked the question, everyone is just sitting passively and listening—first to the question, then to the response. Even the person who asks the question hasn't been very active. That person hasn't been involved in any give and take about the topic, but has merely posed a single question that is on his or her mind and then sat down to passively listen to the answer.

Whole group discussion. Sometimes in an agenda-design meeting someone will suggest, "After his presentation we'll do some Q&A and then let's open it up for a group discussion. We'll already have mic runners in place from the Q&A section." Whole group discussion works well within small-to medium-sized groups. A group of fifty, if they are meeting for a couple of days, can start to have fairly meaningful group discussions if they are well facilitated. But if you have a group of 150 or 300, then it is essentially a symbolic statement about honoring the voices in the room. Such a symbolic statement is extremely valuable and communicates a lot to the participants. But this should not be confused with offering them an active role in which they are contributing to the meeting.

This could be seen as a delicate differentiation, but in fact it is not. It's quite plain and clear. For the vast majority of participants in the meeting, whole group discussion means sitting passively and listening to a few different people put out their point of view. Most of the participants don't get to say anything. We often hear senior executives say, "If these people are our leaders, they'd better be willing to speak up!" This points to a fundamental misunderstanding: if they all wanted to speak up, there certainly wouldn't be enough time for all of them to do so. The only reason that whole group discussion can be entertained as a viable agenda activity in a large meeting is because so many people aren't comfortable speaking up. Speaking up becomes a symbolic activity with a few of the extroverts, or people confident in their position in the hierarchy, who speak up to symbolize the voice of the rest of the participants in the room.

Panel discussions. The participants are in the same passive listening role as with any presentation from the stage. Adding Q&A doesn't change that role, as mentioned above.

Breakouts. If there are more than about fifteen participants in a breakout, a lot of them will spend the breakout passively listening, while a handful of people do most of the talking. This situation can be improved if there is good facilitation and more time allotted. Once you get up to twenty-five or thirty participants or more, even good facilitators are unlikely to keep all of the participants active and contributing to the conversation. So breakouts can work as a way to give participants an active contributing role in the meeting if they are kept small enough to allow everyone to participate. However, with large meetings that means a lot of breakout groups.

The consequence of all these breakouts is that you have many separate experiences to reassemble for the larger group. If you have many small breakout groups go out and have discussions, how do you converge those discussions into something of value for the group and the organization? Generally, the device that is chosen is the dreaded "series of report-outs." Representatives from each group get up in front of the room, one after another, and give a synopsis of what their group discussed. There are variations of that format, of course. You can have representatives just stand up at their table and report out. You can have the representatives add only new thoughts to what has been said already. You can have representatives use a flipchart created in the breakout as a visual aid. You can have a gallery walk of all of the flipcharts. But in the end, the result of having breakouts is usually some lengthy period of the agenda when all of the participants are sitting passively and listening to a whole series of reports of what went on in the other breakouts.

Vicious Cycle of Participants as Passive Audience

A vicious cycle occurs when outcomes created by an activity or condition lead away from a positive end. The negative outcomes created make it increasingly difficult to change or improve the original activity or condition. In this way, vicious cycles become a downward spiral (Figure 1.4).

Treating the participants at a large meeting as a passive audience creates a situation where no one can tell what the participants are thinking. Since no one knows what anyone else is thinking, and there is no venue for discussion, no one has a means to resolve doubts or overcome reservations. Participants remain distant from what is being presented and can't generate a sense of ownership. The lack of ownership makes the leaders of the group feel that they need to step in and take control, which reinforces the decision to treat the participants as a passive audience.

Today there is an alternative. Communication connectivity enables everyone to air their ideas and to hear the main messages from everyone else. Because this alternative exists, it becomes imperative to revisit our deeply ingrained habit of treating participants as a passive audience. We have to ask ourselves:

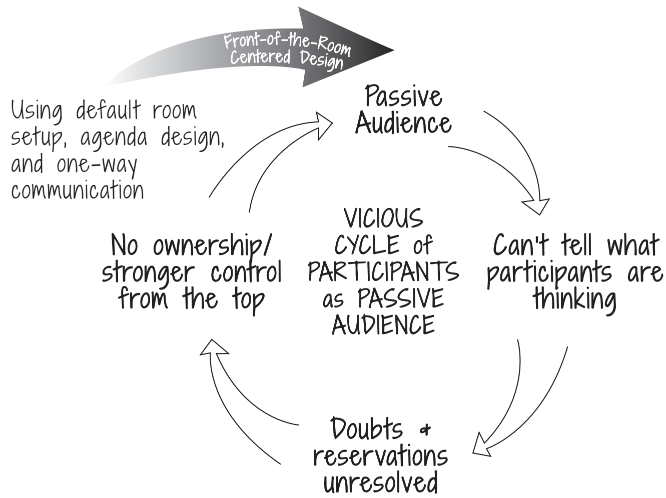

Figure 1.4 Vicious Cycle of Participants as Passive Audience

Does it serve the participants?

Does it serve the leadership?

Does it serve the organization?

First, let's talk about the participants. If you are gathering with two hundred other people from a hierarchical organization, most of whom you don't know very well, you may find comfort in a format where you simply sit and listen. At breaks and evening events you can socialize with people you know but don't see often, meet some new folks, and have quiet, earnest chats with people there whom you know and trust.

So on the one hand this passive role of the legacy meeting serves your needs. It is a safe format for the most part. On the other hand, it is flat. It's neither stimulating nor challenging. You get some summary figures and a general sense of what's at stake, but for the most part you don't learn very much.

There are no "Aha!" moments, little new perspective, and little time to really think about the content of what is presented. Mostly you file it away to revisit after the meeting. The politics and the egos are mildly interesting and important to keep track of, but the overall experience ends up being routine and uninspiring.

In addition, nobody learns anything from *you*. Your perspective on what has been said, thoughts about the business, and ideas about the future of your organization aren't shared with anyone. Some conversations at the breaks and evening events may be stimulating, but they quickly fade from your mind, and they never make it to the awareness of the group.

For the leaders it is no better. The meeting is the opportunity to make sure that everyone hears the same message in the same way. The meeting is the opportunity to try to shape the thinking and the activity of all of the participants who have been invited—focusing them, ideally, in the direction that will have the clearest strategic effectiveness. At stake in all of these "audience members" is the survival and the success of the organization. These are all the people who have to get the work done.

Before the meeting there are countless emails and meetings to decide the content of the presentations and get the slides built. Decisions are made about who will present what. The energy goes up as the meeting nears, and with one week to go, preparations are at a fever pitch.

Then the meeting happens: the presentations are made, there are a few questions from the group, and you try to answer them as fully and precisely as you can. At the end of the day, there is a dinner and networking activity.

In reality, you have no idea what all the participants were thinking: what they heard, what they thought about it, if they understood it, if they agreed with it, or if they are willing to apply themselves with their minds and hearts to achieving it. You know what you said, but you have no idea what was heard and what effect, if any, it had on these people. You probably won't ever know. You may not even see all of them again until the meeting next year.

Ultimately, it is the organization that suffers. Suboptimal meetings, and meeting formats, are not just hurting the participants and the leaders. The participants may be bored and uninspired (and think that's just how these things are), and the leaders may be flying blind in their effort to inspire and focus their "audience" (and see no way around it), but the real loser is the organization itself. If the organization is unable to access the vast resource of its people's knowledge, experience, and creativity, it cannot perform to its potential. The meeting itself weakens those virtues and ideals that drove the original desire to meet. The whole group, as a team, misses out on the chance to build the creativity, flexibility, and unity of the organization.

THE VIRTUOUS MEETING *ITSELF* IS THE MESSAGE

The *design* of the meeting is a communication too—a very obvious and visceral communication. No one sits and ponders it or figures it out. The participants simply experience it, and they understand what you are telling them.

How you design and conduct your meeting says as much about your organization as any of the words that get spoken from the stage. The meeting *is* the message. The question is: What are you telling them? What kinds of things could you tell them? How would it make a difference?

With your design you could tell them they are important. Or you could tell them that they're not. You could tell them that you are interested in what they are thinking. Or that you are not. You could tell them you want to coach them, or you could tell them you want to micro-manage them. You could empower them, or you could disempower them. You could tell them they are a large, focused, interdependent team, or you could tell them they are all individual players.

But the important point is that you are telling them these things through the way you design and conduct the meeting. Whatever you say when you get up on stage, if the format of the meeting doesn't make the same communication, your content message will be badly undercut. You can say all of the right words, but if the meeting format shows the participants that their opinions are only secondary, they won't be very inspired to take risks, innovate, or martial their efforts for the benefit of the whole.

If I'm sitting in a huge ballroom and I'm treated like the audience to some entertainment—talked at, bored, forced to sit still and watch the stage for hours—I'm not likely to believe you when you say, "The people of this organization are its greatest asset. It's all of you that constitute our competitive edge, and I'm confident that you will bring the innovation and inspiration we need to . . ." As I listen to your words, I realize there is a disconnect somewhere. And I have my doubts about what will actually come of all of our efforts.

But if you can get me talking and thinking so I start to have some flashes of insight, *and* you make me feel part of an extended group and help me feel that everyone here is my peer and has my back, then I might start to feel bolder and more stimulated to take up a challenge. Then I'll start to believe your words, and I'll begin to think that you believe and respect mine. And I honestly don't know how high and how far we can all go together.

The most important point is that *every meeting design* is a loud, clear, and unequivocal communication. There is no neutral design, no design that doesn't communicate something. This is a difficult but crucial point to grasp: whatever design you create, whatever role and experience you give the participants in the meeting, you are making a clear and unmistakable communication. It is as powerful as all the content that gets presented from the stage, and it is more quickly understood and assimilated by the participants.

The virtuous meeting is about being conscious of that communication. More important, it is about designing meetings that empower and inspire people and that make groups feel like teams, giving all the courage to take risks and the resources to reach farther.

CHAPTER ONE • QUICK SUMMARY

- Collaboration and inclusion are key virtues that organizations will need to fully embrace in the future.
- Large meetings have traditionally been conducted as front-of-the-room-centered meetings—where participants are in the role of passive audience members.
- Many people believe that as meeting size increases, interactive communication becomes impossible.

- There is a vicious cycle in traditional large meeting designs that enforces a passive role on the participants.
- An alternative to this tradition is the virtuous meeting, where the participants are in an active, contributing role.
- The goal of the virtuous meeting is convergence.
- Convergence can be achieved via participant-centered design and high-speed connectivity, together.
- The form of a virtuous meeting itself is a message about how much you value the participants and what you think is possible for them and for the organization.