Meetings That Matter, Conversations That Connect

Why Do We Have Meetings? A faster, global, more interconnected and complex environment has led to a greater need for the exchange of relevant knowledge and for rapid innovation. Organizations are evolving into networks that sense and respond to accelerating change through ongoing and robust strategic conversations. As a result, time spent in meetings and on other communication has increased exponentially. In this new environment, traditional meetings, dominated by "experts' using slides and lectures to impart overt knowledge, are no longer very effective. We need to change the structure and process of our meetings so that we have *Meetings That Matter and Conversations That Connect*.

We have meetings to…

1. **Transfer overt knowledge from an "expert" to a learner**
2. **Share tacit knowledge among peers**
3. **Create knowledge "to go away with something no one person could have brought."**
4. **Build relationships, trust and community of practice**

…so we can act effectively and efficiently both together and alone.

Overt knowledge is knowledge that is known. It has been captured and codified. If knowledge is overt, it can be transferred by being written and read, in a video, or in a presentation. It can be mass distributed or housed in a database where it will be available for "just in time" learning though an inquiry system.

Mass distribution of overt knowledge through unfocused written materials or lectures is highly inefficient. Retention rates are low when the learner is unable to apply the knowledge to their specific need, get practice, and receive the feedback necessary for mastery. In modern society's battle for attention, designs for the exchange of overt knowledge need to engage the learner by linking to their real needs and questions and by providing opportunities for active application and feedback.

Tacit knowledge is knowledge that resides in the mind of an individual or group of individuals. It is not captured or codified. It is accessed in the act of responding to a specific question or problem. It is often transformed in the transfer process because the response to a new problem or question frequently results in the knowledge being used in new or innovative ways that the knower would not have thought of if the question or problem had not been presented.

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The exchange of tacit knowledge requires human conversation. It also requires paying attention to:

- Who knows
- Who knows who
- Powerful questions
- Social “glue”

Innovative or Emergent knowledge – “what no one person could have brought with them” – is produced within generative human conversations. It requires paying attention to:

- Building high levels of transparency and trust, and environments safe for experimentation and learning from failure
- Making room in the conversation for diverse voices in order to generate ideas from multiple perspectives
- The rhythm of creative processes that open up idea generation followed by collaborative processes that bring synthesis and practical application
- Iterative learning through rapid prototyping, frequent experimentation and techniques like after action reviews.

Building relationships, trust and communities of practice can underlie and accelerate all of the above but its most powerful impact comes if there is a continued exchange of tacit information and creation of innovation on an informal basis through a variety of venues including during and beyond formal meetings. Relationships, trust and communities are nurtured not built. You can create environments that are conducive to their development but they are innately voluntary. The individuals that make up communities come together around common goals and activities and *confer trust by experiencing each other as reliable, competent and ethical.*

Meetings That Matter are those that are structured to maximize the opportunity for participants to engage in deep conversations about their most critical and powerful questions. These meetings, whether in person or virtual, have the greatest potential for sharing tacit knowledge across the organization, for fostering generative conversations that create new and innovative solutions to pressing problems, and for gaining individual and group commitment to the identified actions. To the extent that the meetings pay attention to the “social glue” - transparency, trust and relationships in the network - they build the capacity of the organization to continue this work beyond the meeting. These meetings are *Conversations That Connect*.

Simply put, meetings structured as highly relevant and open conversations foster the continuous and effective application of all of our knowledge and creativity to our most pressing questions and challenges. The material on the next pages will help you get started planning a Meeting That Matters. Good luck.

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Getting Started

Step 1. Why are we meeting? *Identify the topic agenda and key questions, information sources, and desired outcomes.*

Work with the meeting planning team to determine the topic agenda, key questions, information sources and desired outcomes for the meeting. Start the conversation with participants prior to the meeting via a short survey* that identifies their burning questions, unique knowledge they can contribute to the conversation and their most high value desired outcomes. Use this information to answer the following questions:

1. What topics should be addressed at this meeting?
2. Which topics are pre-requisites of other topics?
3. For each topic, what are the critical underlying questions that need to be discussed or decided by the participants?
4. What do the participants need to know to be able to discuss or decide each key question? (What are the participants' key questions?)
5. For which questions are the answers likely to be already codified in a document or presentation?
6. For which questions are the answers likely to be found by sharing opinions and tacit knowledge with other participants?
7. For which questions must the answers be created by the collective thinking of the participants?

You are now ready to write a set of objectives for the meeting. This will make the desired outcomes transparent for everyone involved - the planners, the presenters and the participants. A simple way to create the objectives is to finish the sentence: *Given the topics and questions identified, this meeting will be successful if at its conclusion participants will be able to …*

To create a high level agenda, write a list of the key questions to be answered in pre-requisite order. Next to each question indicate where the answers are likely to be found. Hint, the questions "Who is in the room? and "Why are we here?" are usually first on the list and the question "What are our next steps?" is usually last.

Step 2. What process might lead to our desired outcomes? *Create and document a process design that parallels the question agenda and that describes how and for how long the key questions will be addressed in order to reach the outcomes.*

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There are actually many process sequences that can lead a group to the same desired outcomes, Creating "the best" is usually an iterative process that takes into consideration the needs and preferences of as many of the people involved in the meeting as possible. This is an art as much as a science. Thinking about the flow of the meeting from the participants' perspective and obtaining guidance from an experienced meeting designer can both be very helpful.

In general, getting everyone in the room talking during the first 30 minutes of the meeting will increase the likelihood of a robust conversation throughout the meeting. Minimizing the time spent in presentations through pre-reading or video presentations prior to convening in the room will leave more time for sharing tacit knowledge and innovative thinking. Leaving plenty of time for individual and collaborative action planning at the conclusion of the meeting will focus the conversations on the desired outcomes.

Document and share each iteration of the meeting design including the question or topic to be addressed in each segment, the time line, and a brief description of the process that the facilitator and the participants will be using for each segment. You can add the materials, audiovisual and logistics details in later versions. Initially, this document will help the planners see the overall flow of the meeting and how each part fits into it. Later, it can be used as a facilitation and logistics guide during the meeting. However, a final agenda and process design should be agreed to and signed off on as early as possible and before entering the materials creation phase. Late changes to the design can cause re-work of materials and/or negatively impact the cost and quality of the meeting and the morale of the design and facilitation team.

Step 3. What materials do we need? *Create the materials*

The meeting planning team, and the designated presenters and facilitators should create the materials to implement the design of the meeting. Materials might include worksheets or a workbook, instructions for exercises, presentation slides, pre-work, the formal agenda, evaluation form, a "face book" or list of participants, etc. It is most efficient to have the in-house presenters/facilitators prepare their own materials by working from models, templates and instructions provided by a coach who can edit drafts and give feedback on clarity of content. If time is short, an outside resource can create materials in consultation with a content expert. However, because it builds the capability of people within the organization to do it themselves, it is often more effective and efficient to have the primary responsibility for materials creation reside with the person who will be responsible for "delivering" that section of the meeting. The document "MTMMaterialsCreation.doc"" includes practical guidance to presenters and facilitators on creating materials.

Step 4. What facilitation/presentation resources do we need? *Provide facilitation and presentation coaching as needed or secure a professional facilitator*

A great design, no matter how well targeted to key questions or interactive in intent, can fail if it is not well facilitated. The detailed description of the objectives, questions and the

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process that is included in the documentation of the design will help the facilitator or presenter know what to do and when. A professional consultant can help if a presenter or facilitator needs coaching on how to present or facilitate a discussion. There is an obvious benefit to using team members as facilitators – they know the business and are best positioned to continue the conversation after the meeting. However, if the mangers or presenters need to be part of the conversation, or if there is a risk that a person's position or the political environment might inhibit the free flow of ideas, consider engaging an outside facilitator.

*** Pre-Meeting Short Survey**

"Short" is critical to getting a broad response. Create no more than a two or three sentence description of the intended focus and purpose of the meeting. Position this questionnaire as an opportunity to begin the conversation and to insure that the meeting is focused on the key questions and highest value outcomes of the participants. Give instructions on when and where to respond and how the responses will be used i.e. collated and shared anonymously with the whole group. Then, ask these questions:

1. Given the focus of this meeting, what are your burning questions?
2. What unique knowledge or experience with this topic might you have to contribute to this conversation?
3. Please complete this sentence: "This meeting will be successful if at its conclusion I…

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Barbara A. Simonetti is an independent consultant specializing in developing the capacity of managers and professionals to create share and use knowledge to meet challenges. She has extensive experience in meeting design, presentation and facilitation skills coaching, group facilitation, training design and delivery, strategy implementation, and building networks and communities of practice.

Over the past 40 years, Ms. Simonetti has contributed to the field of facilitation and education in both the public and private sectors. Her background includes consulting, and management experience at Chase Manhattan Bank, Citicorp, Rhone Poulenc Rorer, Pfizer, Microsoft, Communispace, Lever Brothers, Merck, Fibar, C.I.T, DuPont, Calvary Hospital, The Forum Corporation, City University of New York, The City of New York, EMC, WGBH, the Longwood Cricket Club, The Princeton Center for Leadership Development, Cornell University, Simmons College, The First Affirmative Investment Network's SRI Conference, and many other community and social profit organizations. She initiated the Knowledge Management Interest Group for CAM-I, a collaborative research organization whose members include Fortune 100 manufacturing firms and the big major consulting firms. She has also served as master facilitator for a number of on-line corporate communities. Her international corporate work has included consulting on design and facilitation of international teams of senior and functional managers and the creation of communities of practice and networks across functional groups and geographies.

Most recently she has focused her efforts on innovative social profit organizations and is currently actively serving on the boards of the New England Center for Investigative Reporting and the National Coalition for Dialogue and Deliberation where she will assume the chair in January of 2014. In May of 2013, she organized a coalition of socially responsible investment professionals, church and community organizations to produced and facilitate a forum called "To Divest or Not to Divest" which can be viewed on You Tube.

Clients have given her consistently high praise for her ability to quickly assess both the organizations' context and the participants' needs; to create engaging and focused interventions; and to facilitate with a style that enables participants to take risks, grow, and achieve their intended results.

She holds a Bachelor of Arts degree in Sociology from Fordham University, a Master of Science degree in Education from Columbia University, and a Master of Business Administration from New York University. She has completed course work at Harvard University in Microcomputers and the New Technology. She has a continuing interest in systemic social justice and environmental issues, learning in both the educational and corporate settings, and in the architecture of collaborative conversations and networks.

Prior to her business career, she worked as a youth worker in the South Bronx for organizations such as the Police Athletic League and the Boys' Clubs of New York. She managed the Therapeutic Recreation Department at Calvary Hospital, a facility for terminal cancer patients. She was on faculty at City University of New York for 5 years where she taught on the graduate and undergraduate level. She was named educator of the year by her peers.

She is married to Charles Sandmel, a socially responsible investment professional with FAFN and is the mother of Michael Sandmel, coalition manager for the New Economics Institute.