

MEETING BY DESIGN

BY SUE PELLETIER

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“The time was ripe for something different. People are bored to death with meetings as usual,” says Joan Eisenstodt, chief strategist, Eisenstodt Associates LLC, Conference Consulting, Facilitation & Training, Washington, D.C. She and Vanessa Vlay, chief marketing officer with San Francisco — based Certain Software, had been talking for years about holding a pilot program for, by, and about women in the meeting industry. Last summer, they decided to make their vision a reality.

But they wanted the meeting's design to be just as innovative as the thinking they hoped to inspire — a meeting that would incorporate as many adult-learning best practices as possible, in hopes that the result could be a model for others who want to spark creative thinking and get more positive outcomes. A longtime proponent of facilitated learning, Eisenstodt asked Diane Wendt, CEO/president of AtEz LLC, a coaching and consulting practice in Gilbert, Ariz., to help design and facilitate the new model.

The result: the First W2W Invitational, held March 12 to 13 at the Chaminade Conference Resort in Santa Cruz, Calif. — a small meeting based on some big ideas.

THE FIRST STEPS

Among the difficult early decisions Eisenstodt and Vlay had to make was determining who should be invited — they had to keep it small for the group dynamics they wanted to happen. While they wanted to ensure that participants represented as many industry segments, age groups, and other demographics as possible, all had to have one thing in common: a commitment to excellence. After much agonizing, they came up with a list of 50 prospects, 31 of whom were able to attend.

It was different from the start: The invitation sent to potential participants didn't give the faintest hint of an agenda, just that it would be a “women's weekend for women in or near the hospitality/meetings/association communities.” The idea was to wait and see what the participants felt was important to address, rather than have the organizers decide for them. The response was immediate and dramatic, says Eisenstodt.

Then the first of many changes happened: Vlay had to move to the sidelines for personal reasons. While the usual meeting models would have called for a reschedule or postponement when a founder had to bow out, Eisenstodt instead asked Wendt — who

has created successful environments for adults to learn and excel for more than 25 years — to take the lead on the design. She also drafted me and Chris Galvin, United Way director in Northwest Ohio, to help make it happen.

“The thread didn't break with the change in Vanessa's involvement; existing strands changed texture, and the new strands brought in created some great new patterns,” says Wendt. The meeting — which began with the first virtual contact, through the on-site meeting, and continues even now online — was not designed to have one or two people lead what happened; it was designed to create an environment for the leader in each of the participants to emerge.

DESIGNING WOMEN

We began by e-mailing potential participants for input on design and content. Most said they wanted a high level of interactivity, small-group discussions, and opportunities to get to know each other better in an environment that encouraged sharing and interacting. We also came up with 25 potential personal and professional topics — any of which could easily have taken the entire two days to explore.

To define the initial outcomes, we pored over all the e-mail responses to find the common threads in people's expectations (see box, page S 14). We also distilled the meeting's “collective norms,” which centered on being inclusive, fostering open communication, and ensuring mutual respect and confidentiality. The design team and Eisenstodt then began to hammer out the beginnings of an agenda. We grouped topics into personal and professional categories, and decided to put the final selection from all in groups on a wallboard the first evening and let participants vote by placing small, color-coded dots next to the topics they were most interested in. Then we'd pull the “dottiest” topics from a hat for small-group discussion the next morning. As Wendt explains, having the topics selected by, for, and with the participants would create profound change because they were core issues for each participant.

While it was important that we defined outcomes, it also was important, given the range and complexity of the issues and the diversity of the participants, that we did not set clear expectations on how we would get to them. That way, the meeting could stay fluid and evolve when change was needed while still meeting the objectives.

FORMING A VIRTUAL GROUP

To gel the group as a working group before the event, we opened a Yahoo Group Site to connect online. “Whenever human beings get together, you have to expect that they'll need to do ‘weather talk,’ those getting-to-know-you conversations,” says Wendt. “The work we did online usually takes precious content time — up to a day and a half at most workshops.”

We started by asking participants to post basic info, such as name, title, a short bio, expectations for the meeting, favorite quote, and biggest challenge they face. To get even

more of a feel for the individuals involved, we added databases asking about bios, favorite songs to sing in the car, hidden talents, favorite movies and TV shows — even favorite foods. We posted files of resource information based on the interests generated by the participants. We also conducted polls to get the flavor of the group as a whole. Most importantly, the participants began to take over the databases and resources, taking even more ownership of the agenda.

The function that really got the group to coalesce, though, was the e-mail chat. Because it was a closed group with agreed-upon confidentiality rules, the discussions quickly moved beyond anything most would feel comfortable with in a more public forum, such as an industry listserv. From “What should we wear” types of questions it quickly spun out into religion (participants ranged from conservative Catholic to pagan), politics (from Libertarian to ultra-liberal), and the life experiences that helped to shape who we are. Of course, the design team benefited by getting to know much more about the individuals and the group's dynamics. We also got the buy-in from the group ahead of time to be open to a new way of doing a meeting by creating a virtual “safe place.” Wendt facilitated the site, including the e-mail chats, and if someone started veering off-course, she e-mailed the person individually to clarify and reinforce the norms of behavior we had agreed upon.

Just how active a forum was this? From the time the site was set up February 5 until the meeting began March 12, participants posted more than 700 messages. At one point, I got a little concerned that it was getting to be a bit too much, so I posted a new poll to find out how people felt about the online interaction. While almost 14 percent found it to be overwhelming, only 7 percent felt it was too much too soon. The majority checked off “fascinating,” “a great way to get issues on the table,” “an easy way to get to know each other,” and “gives me a lot to think about.”

FROM VIRTUAL TO REALITY

Because Chaminade's conference planning manager in charge of W2W also was participating in the meeting, she paid attention to the themes emerging on the Web site. The result was an amazingly decorated room festooned with all kinds of hats — representing the different roles women play — and signs pointing in the different directions we might want to explore. As Wendt says, “Even though we'd come together as a virtual group, things change as you come face to face, and the environment has a large influence on how those changes evolve.” As those who have attended Eisenstodt's sessions would expect, there also was no shortage of toys and arts and crafts supplies, which attendees put to immediate use creating name tags and table tents. Each attendee also was given a journal to reflect in during the open times — when they weren't in the spa, that is.

We even tried to inject some creativity into the “housekeeping” items. For example, Wendt ensured that the norms were upheld throughout the meeting by assigning someone in the group to be the enforcer of each norm. Participants then made signs (some pretty elaborate) that said things such as “No sidebars” and “Be kind” that they held up anytime

someone violated the norms. Instead of being contentious, this lighthearted approach got us laughing over negative behavior, and was very effective in keeping it to a minimum.

Almost every participant volunteered to take some role in the meeting: One interviewed Chaminade's safety and security experts and reported the necessary protocols to the group; others volunteered to “storyboard” the process by marking “ah ha” moments and points of interest on a sheet of paper that stretched across the front of the room. Participants also brought relevant books, magazine articles, and other items to share in the “resource room” set up across the hall. They also brought their favorite CDs, which we played at various points throughout the meeting.

FACILITATING THE OUTCOMES

For this model to be successful, the facilitator should be involved in the design from the start, says Wendt. “For the facilitator to be able to consistently, constantly channel the energy in the discussions toward the outcomes, she has to be totally aware of the meeting's design.” The facilitator should not be the group's leader — “a good coach leads from behind,” says Wendt — but rather the person who can spot problems and defuse them by addressing them, incorporating new issues into the meeting's design on the spot, or finding ways to get side issues dismissed by the group.

We saw this in action throughout — the most obvious example happened on the second day when, after “taking the temperature” of each person in the room, Wendt chucked the agenda and took us in a new direction altogether when a new idea came up and people jumped on it.

“Another key part of the design was to try to capture as many of the participants' hidden agendas as possible,” says Wendt. While we tried to ascertain as many of these as possible in the virtual work we did pre-con, a few slipped by — one of which was the idea that popped us off the agenda that second morning. But the free-form design of the meeting allowed the abrupt shift, and we soon were off on a new, more productive course.

With only two days to work on it, we didn't actually discover the answer to world peace. But we did form a solid, supportive working group that is eager to take the next step down the road toward more rewarding personal lives, a more valued profession, and, of course, more effective meetings.

W2W Objectives and Outcomes OBJECTIVES

- Have meaningful, face-to-face dialogue regarding our core values and guiding principles as women, as professionals in this industry, and as contributing members of our society.
- Experience “creative chaos” that will ignite our passions and help us to break out of our usual ways of thinking.
- Share best practices and develop new and innovative ways of dealing with

- industry challenges facing us now and in the future.
- Discover, affirm, and celebrate our commonalities, recognize and find strength in our differences, and find ways to play to our strengths as women and individuals to move ourselves and our industry forward.

SAMPLE OUTCOMES

- Learn how to increase effective communication with colleagues, clients, and business partners.
- Develop ways to increase cooperation in the workplace and improve teamwork among those of different genders, ethnicities, and age groups.
- Share best practices and explore strategies to enhance and elevate the meeting profession, both within individual organizations and the industry in general.
- Strengthen leadership skills and learn how to encourage leadership in others.

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For more information on this topic and other related areas feel free to contact:

Diane Wendt
AtEz, LLC
A Coaching and Consulting Practice

**1405 West Lake Mirage Ct., Gilbert,
AZ 85233**
Ph: 480.703.3426
email: Diane.Wendt@atez.org
website: www.AtEz.org

**Joan L. Eisenstodt - CIC Hall of
Leaders Inductee**
Chief Strategist
Eisenstodt Associates, LLC, Conference
Consulting, Facilitation & Training
**770 5th St., NW, #1105, Washington,
DC 20001-2672 USA**
ph.: 202.543.7971; fax: 202.543.4619
email: eisenstodt@aol.com