CONSTRUCTING BETTER MEETINGS

BY MAUREEN LITTLEJOHN

ILLUSTRATION BY ADAM NIKLEWICZ

It may not come easy, but it's time for planners to take a "D" school approach to planning their meetings. An expert explains how.

Roger Martin, dean of the University of Toronto's Rotman School of Management, has moved the school from 72nd to 24th place in the world of MBA business schools.

ROGER MARTIN, DEAN OF THE UNIVERSITY OF TORONTO'S Rotman School of Management, advocates digging deeper if you want to hit the gold — an emotional connection — that makes a meeting exceptional.

MEETING PLANNERS ARE GENER-ally a very deductive, expeditious bunch. They can count coffee cups to perfection, concisely estimate appetizers without overage, deliver the right number of bodies to hotel rooms, and pull off a major convention without a hitch. But when it comes to elevating a meeting to the realm of the unforgettable, Roger Martin believes many planners could sharpen their skills. How?

"In order to design better meetings, planners need to attain a deeper and more broad understanding of the user," says the dean of the University of Toronto's Rotman School of Management. Martin is at the helm of a business school that is fast becoming known for its philosophy of integrated design thinking — think "D"(design) school instead of "B" (business) school. Rotman partnered with PCMA to offer the PCMA Innovation By Design Executive Edge Program, held in January during PCMA's annual meeting. (See companion story on page 46.)

To assess a meeting's success and plan for the next one, planners usually rely on surveys. That's good, Martin says, but they also must dig beyond functionality and mine the hidden caches of emotion. "They are used to asking questions about deliverables, like what will make a binder better, or what an attendee's conclusions were, or if the data was transmitted correctly. But they need to be asking attendees, 'How do you want to feel during the conference? Excited? Taken to the edge? Out there? Comfy, warm, and secure?'"

Martin, who is 50, is from a small Mennonite community in Ontario. He graduated from Harvard Business School, and worked with a group of Harvard buddies at a very successful business consulting firm called Monitor Company in Massachusetts before joining the Rotman School of Management in 1998. Since he came on board, the school has moved from 72nd to 24th place in the world on the *Financial Times*' list of MBA-granting business schools. He introduced the school's signature integrative thinking teachings as a way to design solutions to complex problems and posits that businesses today must reward risk-taking and encourage new ways of looking at products, services, and processes.

The problem most meeting planners have, according to Martin, is they are "too busy focusing on the technical, and they're missing out on the emotional, what makes attendees say 'Wow, that was fantastic,' on their way home." The way to achieve this, he said, is to design

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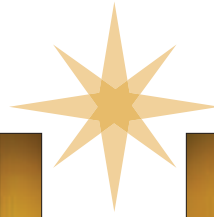
PCMA Senior Director of Education Glen Ramsborg, Ph.D., speaks at Executive Edge.

Rotman School's Heather Fraser encourages feedback from the Executive Edge participants.

an overall experience once you know how they want to feel. This could range anywhere from attaining goals such as "receiving more knowledge, to getting out of the office, to feeding my mind, to having a social experience, or being able to show off in front of my colleagues," notes Martin.

Great design helps to create a feeling as well as deliver functional utility. For instance, Martin points out, "The iPod not only plays songs, it makes you feel like you're the one in control of your play list, your coolness, and your destiny. MP3 players don't make you feel that."

So, how would Martin go about designing a meeting of 1,000? First on his list would be to interview attendees, "to find out how they want to feel and function, and visualize a way to try it. I'd convince a half-dozen of them to work through a prototype of this visualization. It wouldn't be perfect, but I'd just get them in a room to try it. Or I'd find a conference that is similar to what I have in mind and have the people attend. Then I'd interview them and modify the plan. It doesn't need to be really risky, but just a little leap of faith."

When you design a prototype, failure is always a possibility, but Martin sees this as a positive. In a July 2006 *BusinessWeek Online* article titled "At the Crossroads of Design and Business," he explained, "Even failed experiments help convince customers that the company is aiming high, and the feedback will help them come up with newer, better approaches. In this operating environment, line managers will view customers as people with whom to proto-

Executive Edge participants literally "crafted" a better meeting.

Teams at Executive Edge presented their results to the rest of the group.

type and test new ideas, as colleagues in innovation, sitting on the same side of the table."

THE LOGIC OF WHAT MIGHT BE

For success in any business venture, Martin said there must be a combination of inductive, deductive, and abductive logic or reasoning. Inductive logic relies on the "proof is in the pudding" formula — demonstrating through observation that something actually works. Deductive reasoning deduces that something must be, based on a set of existing principles. Abductive reasoning is the logic of what might be. Abductive logic is the dark horse for tried-and-true corporate thinkers, as it doesn't rely on cold facts but

"Almost everything that we think is real is actually a construction of inferences and interpretations that we misinterpret as reality. And unfortunately, the belief that we are directly observing and understanding 'reality' discourages us from trying to change it. Hence our concept of 'reality' is the enemy of innovation."

— Roger Martin, "Is Reality the Enemy of Innovation?"
— *BusinessWeek.com*, Dec. 4, 2006

on anecdotal evidence and intuition. By utilizing these three modes of logic, good designers, according to Martin, "don't take massive risks."

Research In Motion Ltd., the Waterloo, Ontario, company that launched the BlackBerry in 1998 is a shining example. The company worked with an unproven concept — that consumers would use a newly invented portable device that combined voice and e-mail functions. After much testing and evaluating, they decided they had a winner and went into production. With a current market capitalization of $24 billion, even "winner" becomes an understatement.

That combination of logic is crucial to great meetings, too. Meeting planners, Martin said, "are incredibly, logistically precise and use their left-brain skills. They should

INTEGRATIVE THINKING IS THE WAY TO SUCCESS
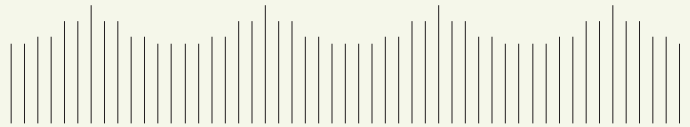
THE KEY JOB OF A LEADER IN today's climate is to make valid, rather than reliable, choices out of messy, complex situations. Such decisions cannot be made from within narrowly defined functional or operational boundaries, and as a result, modern leadership necessitates the flexibility and creativity of Integrative Thinking.

Integrative thinkers build models rather than choose between them. Their models include consideration of numerous elements — customers, employees, competitors, capabilities, cost structures, industry evolution, and regulatory environment — not just a subset of the above. Their models capture the complicated, multifaceted and multidirectional causal relationships between the key variables in any problem. Integrative thinkers consider the problem as a whole, rather than breaking it down and farming out the parts. Finally, they creatively resolve tensions without making costly trade-offs, turning challenges into opportunities.

— Rotman School of Management Web site, www.rotman.utoronto.ca

not give that up. It isn't a war between the left and the right. We were given both, and life is complicated, so we need both to solve problems and succeed."

Design thinking, he says in the *BusinessWeek Online* article, has been around for years and quotes a 1965 speech of Hugh DuPree, whose family turned Herman Miller from a failing residential furniture manufacturer to an American design leader:

"Designing, then, is a basic activity. It comes to grips with the very essence of a problem and proceeds to develop a solution organically, from the inside out, as opposed to 'styling' which concerns itself largely with the distinctive mode of presentation or with the externals of a given solution. The design activity is based upon an understanding of the intrinsic principle of a given problem and its solution."

Martin expands on this by saying in the same article that in a "Design Thinking organization, a company must create a corporate environment in which it is the job of all managers to understand customer needs at a deep and sophisticated level and to understand what the firm's product means to the customer at not only a functional level, but also an emotional and psychological level. It must also create a culture in which line managers are not satisfied with merely serving customers, but insist on delighting them and making them feel the company is their partner, friend, and confidante."

To be a successful design thinker, you must ignore that nagging little voice that uses a negative "reality" to shut down creative solutions — for instance, a price point that is based on what is perceived as "reality." In a December 2006 article called "Is Reality the Enemy of Innovation?" in *BusinessWeek.com*, he uses toilet paper as an example, saying that if it is assumed consumers won't pay a premium for quality, then producers won't even try to provide more quality. If it is assumed shoppers won't pay more than 99 cents for a four-roll package of toilet paper, the focus is on price promotions that enable retailers to hit that 99-cent price point. Then it becomes a self-fulfilling prophecy as consumers wait for those promotions.

An effective way to combat viewing a situation as "reality" and therefore unchangeable, Martin suggests, is to use the thinking tools laid out in Tony

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THINK LIKE A DESIGNER: ROGER MARTIN'S POINTERS

From *Fast Company,* 2005
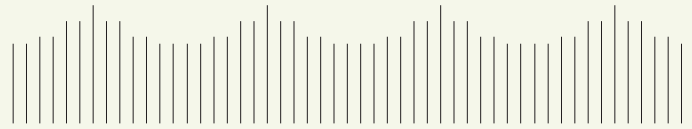
➥ Forget about permanent assignments. Your work will flow from project to project, and you'll organize your life around those projects.

➥ Rewards come from "solving tough mysteries with elegant solutions."

➥ There are no perfect solutions. Designers "try it, prototype it, improve it" and move it.

➥ Don't wait until you can prove something to work. Use foresight and courage to act on what "might be."

Goldsby-Smith's book *Rhetoric*, in which he wrote, "… the object of endeavor is not the description of what is real but rather the reaction of something that does not currently exist; that must first be imagined." The book goes on to talk about Aristotle's division of the world into parts, the first in which things cannot be other than they are, and another in which things can be other than they are. Calling Aristotle the "original Design Thinker," Martin points out that the philosopher argued for "the power of collaborative conversation to generate new ideas," with an intention to invent something new, using inductive, deductive, and abductive reasoning.

NOT ONLY CONTENT, BUT DELIVERY

When you think you're faced with reality, Martin advises you pull back and see the situation as "just another model — one that is likely to be imperfect." If you do that, you can spring into the future by creating a new model and avoid the quagmire of the past.

Regarding the educational component of a meeting, Martin notes that it's important to think not only about the content of the curriculum, but the delivery. "How many of the most popular lecturers get paid only on the basis of content? The ones that get paid the biggest dollars leave listeners with a feeling. Bill Clinton inspires listeners, as do Tom Peters and Jim Collins. The most highly paid speakers who get a good buzz on content alone are few."

A curriculum needs to feed attendees content, as well as to nourish and inspire emotions and feelings. "You need to mix the two together. At a meeting you want them to be excited and then later to translate that excitement into action."

You also want them to retain the information, which is difficult in a passive situation. "You have to get people to do something, get them to somehow engage and work with you or other members of the audience. Maybe it's by turning to the person beside them and discussing the lecture topic," suggests Martin.

In addition, sometimes a light and easy touch is appreciated, notes the educator. "Often, edutainment is just what you need after an intense day. It's a form of self-pampering, like going to see a movie, and it makes you feel good."

When asked about the best meetings he's attended, Martin pauses. "That's the trouble with meetings. Many of them are not memorable." After a bit more thought, he recalls a *Fast Company* magazine brainstorming gathering 10 years ago in Santa Fe. "It was called an advance, not a retreat, and it was fun. There were about 60 people staying at a funky adobe hotel and each evening we did interesting things, like going to a mineral hot springs, or a funky art gallery. It was a feast for the senses, mixed with intellectual interaction and we really got things done. There was lots of dialogue, and it was flexible, with a sense of looseness. A design experience can't be hardwired. You can't treat it like an algorithm. That won't produce what you want."

The worst meetings he's been at are ones where content is blasted in a one-way stream. The solution, he says, is to e-mail speeches ahead of time. "Then discuss it instead of wasting each other's time. The best meetings contain generative interaction."

In Martin's opinion, a top-notch meeting addresses what users really want — and how they want to feel — and then delivers the goods in an "elegant, efficient, and effective way." ➤
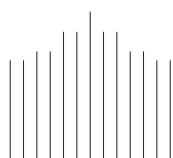
FEELING THE BURN
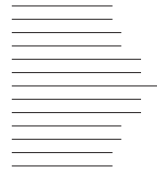
BY MAUREEN LITTLEJOHN

Executive Edge Program Takes Meeting Professionals Out of Their Comfort Zone

IDEAS WERE POPPING LIKE HOT KERNELS OF corn at the Executive Edge: Innovation by Design program, at the University of Toronto's Rotman School of Management in downtown Toronto during PCMA's annual meeting last month. For many, though, it took quite a blast of heat to burst through the protective shell of their "inductive thinking" to reach the tasty morsel of "abductive reasoning."

Translation? Meeting planners are generally inductive problem-solvers, using proven methods to get solid results. The workshop focused instead on abductive thinking, the logic of "what might be," and participants could feel the burn as they worked to wrap their minds around this new approach.

More than 175 PCMA members were up for the challenge and participated in the liberating, but sometimes painful, process of taking theory and putting it into creative action. The payoff was walking away from the conference experience with a new set of tools and techniques designed to unlock fresh thinking.

The two-day mind-stretching workshop was led by the Rotman School's Heather Fraser, an adjunct professor and director of design initiative, whose career includes 10 years at Procter & Gamble and five years with advertising giant Ogilvy & Mather; Julian Goss, chair of the industrial design program at the Ontario College of Art & Design; and David Dunne, the co-director of the Rotman Teaching Effectiveness Centre and 3M Fellowship winner for university teaching across disciplines.

Fraser introduced the program by explaining how design has become the trigger for innovation in top organizations such as FedEx and Apple, and then pointed to what is at the core of successful design and implementation: "empathy and a deeper user understanding."

The key questions she encouraged participants to ask themselves were, "What does an attendee need as a whole per-

Phyllis Azama, CMP, San Diego Convention Center Corporation, and Norwood Smith, Tampa Bay CVB, explain their team's storyboard.

Kati Quigley, CMP, Microsoft, and Anne Hamilton, Walt Disney Parks & Resorts, display the results of their group's brainstorming efforts.

son — intellectually and emotionally? What needs are not being met currently?" The answers, she said, are achieved by "listening."

GETTING DOWN TO BRAINSTORMING

To experience the process of listening and innovation, the participants were divided into teams and each conducted a "user interview." The "users" were PCMA members who had been contacted in September and agreed to take photos at a meeting they attended that would indicate both highlights and weak points. Their role was to present the pictures and critically describe their experiences at the conventions. Based on the insights gained from the user's stories, the teams brainstormed around a perceived need. Rotman business and design students, familiar with the prescribed brainstorming process, acted as facilitators and each team was then able to generate a popcorn bowl full of problem-solving ideas.

Ellen Toups, CMP, president, Outsources, brought user photos from the National Communications Association convention in San Antonio. Her pictures included a welcome reception, meeting rooms, hallways, a networking area, and an exhibit hall. After assessing the photos, the group defined what they saw as positives and negatives, what they felt was most important at the meeting, and what was lacking. The important aspects included networking and building community, and it was determined that more break time, and a better use of space was needed.

ATTENDEE, PERSONIFIED

Next, the groups were directed to come up with a composite persona of an attendee at the meeting. Magazines, scissors, and glue were handed out for each team to create a collage depicting its attendee. Toups' group created Debby Delegate, a highly focused professional who was ambitious, constantly seeking new information, environmentally conscious, and looking for value. Her needs, they said, were to "to learn through experience, and to fulfill personal and professional growth through seeking to build relevant communities."

The rest of the afternoon was spent on the "ideation" exercise. Ideation is a design tool that is used to quickly generate multiple ideas, approaches, and possibilities. It provides a range of new or never-before-contemplated ways of achieving an objective and breaks the traditional tendency towards the shortest logical route between problem and solution. Ideation is a form of brainstorming that looks at a problem, bounces to an idea to solve it, and summarizes the concept.

For example, Fraser noted a problem could be sore feet. One way to solve it was to take the shoes off, the idea's concept being the removal of the source of pain. She noted that there were multiple alternatives to solving the problem, like riding a Segway, sitting down, or buying sneakers. Two of the biggest rules for the session, Fraser told participants, were "don't criticize, and look for the concept behind the idea." After tossing thoughts back and forth, each team came up with an idea to address what they felt was their composite attendee's biggest need.

CRAZY IDEAS ENCOURAGED

The following day, the teams began what Fraser described as "concept prototyping." This was done by tapping into the insights about needs not addressed and sifting through the myriad, brainstormed solutions. Fraser encouraged each team to examine the "craziest" of their ideas and then create a storyboard by drawing them out on paper with markers and cutouts from magazines. She encouraged each team to go with its "biggest idea," to avoid negative filters, and to get creative by partnering with other specialists who could help bring it to life.

Participants drew their prototypes guided by a POEMS chart that covered: People (who); Objects (what is being used); Environment (where it is taking place); Messages (what is being communicated); and Services (what is being provided).

The point of the exercise, explained Fraser, was to come up with concepts that would alter the convention experience. "It's not about shiny, perfect solutions, but user-driven ideas and how far they can push creativity," she said, adding, "I spent a lot of my career making ideas tangible. You have to go through lots and lots to get to the good ones. These methods have always been used in creative fields such as advertising, but they are new to business people."

Ellen Toups' group felt its attendee's need was "to build community" and they addressed it with a concept involving a system and space at the convention that would allow Debby Delegate to connect with appropriate professionals. They dubbed the solution to their problem "Hook Me Up," and used technology (an RFID chip in the name badge to profile and match attendees), and environment (a series of specially designed lounges where these attendees could meet and discuss issues).

FEEDING OFF EACH OTHER

At the end of the day, each group presented its idea to another group and received feedback, both positive and negative. Using what they had learned from the other group, each team then redefined their ideas, and discussed how they'd make it happen. Finally, all the prototype storyboards were posted around the room to create what Fraser dubbed a "gallery of possibilities." These included everything from a VIC (Virtual Individual Concierge) to help with on-site organization, and Brain Food, a nutrition program to stay fit and alert, to a Show Pod, which helped with the selection of a meeting's venue.

After gazing at their colleagues' work, participants were asked to share their overall experiences with the Innovation by Design program. One woman noted, "I learned that school is really hard," while others stated, "This helped me to have empathy for other's ideas," "Don't jump to a solution, go through the process," "In collaboration, sometimes you need a bit of friction," "Be comfortable with ambiguity," "Solutions live in collaboration," "It takes a brave person to behave like a designer," and "It may have been a foggy adventure, but what came out was brilliant!"

DISCOMFORT = SUCCESS

"As we get older, our box for learning gets smaller," said Anne Hamilton, vice president resort sales and services, Walt Disney Parks and Resorts, one of the event's sponsors — and a participant. "I didn't have the best time, but it felt good to be with people who felt the same. It was a unique experience and to support this kind of learning is the best thing we could do."

Julian Goss, one of the program leaders, said the high discomfort quotient meant the workshop was successful. "It's a new kind of thinking and if it was easy, we wouldn't be hitting the things we wanted. What's important about these two days is not that you come away with a world-changing idea, but that you become aware of the tools and processes and implement them into your own methodology."

Fraser agreed. "This makes you think laterally, work collaboratively, and go to places you can't prove will work. It's draining and you have to take a leap of faith. At the end, you realize that what seemed impossible is actually do-able."

Jan Hennessey, CMP, senior director, meetings and event management for Fireman's Fund, learned "to unravel something, not just come up with a solution, but dissect it and look at it from a different perspective. This gave me a template that I can put on top of an issue and put to work."

The creative thinking learning curve may have been irksome, but for Hennessey, Toups, and most other participants who completed the two days, it was like finishing a workout at the gym: It was a good kind of pain. ■

↪ Contributing Editor **Maureen Littlejohn** is a freelance writer in Toronto.

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