

Formulations Video Content
Episode 01 Visual Thinking in Meetings
Transcript

M: Hey, welcome to Formulations. My name is Marisa Boevers and I'm the director of marketing here at ThoughtForm. I'm joined here today with my colleague, Lindsay Quinter who is a design strategist. We are going to talk a little bit today about meetings.

L: Hi everyone.

M: So a quick glance at the internet will tell you that meetings may be the most hated thing in any workplace today. People think they are inefficient, they're boring, they're a waste of time... I don't think there is anything worse than going to a meeting. Maybe someone not bringing donuts to that meeting, but that's about it. So Lindsay, we have a lot of meetings here at Thoughtform.

L: We do.

M: We have internal meetings, we have work session meetings, you and I just had one this morning, and we also have things like client reviews project kickoffs, and discovery sessions. So I feel like we spend at least as much time as everyone else, we put in our time on meetings right? Because of that, I think we've spent a little bit of time, being the designers that we are wanting to design those meeting experiences. So what do you think makes a meeting go super smooth?

L: Well the first thing I always ask a client, or myself, is what are the goals of the meeting. Going into the meeting, you have to have very clear goals of what you are trying to achieve, because otherwise, you can go in and circle a lot of things and not actually get anything done.

M: Been there!

L: The other thing is having the people in the room to accomplish those goals. You don't want to go into a meeting and think you've accomplished the goals you've set and find out there is someone that should have been there, or, you had people there that couldn't really contribute to what you've been trying to accomplish. So those are two big things, but I think what connects them is having a good plan in place for bringing those people toward those goals. That might be a list of topics or questions that need to be answered, or it might be facilitated exercises and specific ways to go about achieving those goals. I think it's important to make those goals visual in the room so that it is very easy to say "those are not our goals today, *these* are our goals today" to keep everyone on track and striving toward those goals.

M: Yeah, that makes sense, so know what you want to accomplish, have the right people there, and have a way to keep yourself on track. But it's hard.

L: It *is* hard, and setting the right goals, is actually hard too, because sometimes you can go into a meeting, with way too broad of a goal—one that you are not going to accomplish within the time that you have. Or, you can go in with the mindset of “Yes, we are going to get these ten things done, in the next ten minutes.” And that's not going to happen either, so being realistic and setting achievable goals and really having a path toward getting there is good.

M: So at ThoughtForm we do a lot of project kickoff or discovery sessions, we call them Vision Catching sessions—one or even two or three day workshops with a client and our team in, as you mentioned, facilitated exercises. I think that often those exercises are designed to take a client from point A to point B, as it's implied in the name, to capture a vision to make decisions and to kind of create a single opportunity for a client, whether it's launching a product or developing a new brand, working on a strategic plan, whatever it is. So, I have observed that often in those sessions there is a moment where clients have a sort of breakthrough. Maybe they're resistant at first, then they get into it, maybe there is division and they come together. What is the magic that makes that breakthrough happen, what is the *lead* to those breakthroughs.

L: That's a really tough thing to pinpoint, but for me it's usually pretty clear: There is a different energy in the room, people are really jiving or working together. As a facilitator a lot of times, I recognize it when I see really high engagement.

A couple weeks ago, we had a workshop and we had all sorts of cards on the wall, I was guiding the discussion, and one of the participants walked up and started moving the cards around. I decided I was going to get out of the way, because they were about to get to something good. You can sense a breakthrough approaching if they go up there and are really engaged with the exercise and they are sort of seeing something and especially when everyone is paying attention. A lot of times we will do small group activities and come back together and cross present. That's usually when the breakthroughs happen, because you can see connections in ideas across teams, and similarities in what you were talking about, or learning in your smaller groups, and that's good too. It's usually when someone runs up to the whiteboard and has to write something down, or puts a big red dot on something, it's usually pretty clear there is an energy in the room. The other thing I've noticed is that people will stand up. When they get excited it's like “Alright we're doing something,” and it's usually right before the breaks.

M: So what do you think the biggest mistake is, what's keeping teams from getting that engaged, breakthrough moment. Because we attend a lot of meetings that we don't plan—not that every meeting we plan is perfect—

L: —And not that we judge!

M: But what are the mistakes, what advice can you give to someone if they were planning a meeting today. “If you want to get to a breakthrough, make sure you don’t__”

L: Beyond not having the right goals and all of that, I would say letting one person dominate the discussion, and getting more people involved helps get those ideas together. That’s the reason you have a meeting, because you want perspective of multiple people, it’s not just to share what you think. So, if one person is dominating the conversation, that’s tough. The other thing is having rules to help make sure everyone stays on track.

At ThoughtForm, we often use this bunny to signal that someone is straying away from the goal, going down a path that we don’t really need to go down right now.

M: Throw the bunny at someone.

L: Trying to control that and staying focused on the goals is really important, and I think the biggest thing is avoiding assumptions. When you’re in a meeting and people are talking, you kind of just assume that what you think you heard is what you heard. Playing back, or saying “Here’s what I think you said, is that right? Are we on the same page? Do you agree?” is important because you can leave that meeting with each person thinking that you made a decision that is different from one another. We often use visual thinking to do that. We write things down on the board to say “You guys, this is what we agreed to, right?” That’s a way to have that playback so you avoid having false assumptions.

M: So you alluded to something that is actually a part of my next question on visual thinking. So we are a design firm, we all believe on some level, in visual thinking, whether it’s sketching on a white board or representing words in a tangible, physical way—on a forehead or wherever it needs to be. So we are big believers in and advocates for visual thinking. Why do you think that visual thinking is so good, particularly for meetings.

L: So there are a lot of reasons: One is that it cuts out some of the confusion. By having something documented in front of everyone, everyone is looking at the same thing. It allows everyone to make sure they agree and they are interpreting everything in the same way.

M: Literally on the same page.

L: Yeah and it also helps just to explain ideas. When you write something down or draw a picture, you’re processing it another time than you would if you just spoke it out loud. It helps you refine what you’re about to share with everybody so you can explain it more clearly. I also think it’s helpful just as a reference point, especially in the kinds of meetings we do—we cover a lot of material. As a facilitator I love it

because I can point to something and say “remember these are the goals” or “we decided over here that this is the most important thing.”

M: My favorite thing is when people point to something that’s not there anymore, like “remember yesterday when...” And it’s just like, “oh yeah right!” putting it into place. Now it lives in our minds.

L: That’s the other thing, it helps with recall. We’re dealing with so much material and it sort of creates an artifact during the meeting that documents what everyone discussed and decided, and you can look at it later to refresh your memory. You can recall it better if you’ve written it down.

M: I’m a big fan of visual thinking in meetings, I can’t believe how many people have meetings where they just talk talk talk and they didn’t write anything down.

So Lindz I feel like you are gone facilitating a workshop every other week, I never see you. I’m so excited to have you here just so I can chat with you. What’s your favorite thing about facilitating meetings?

L: It’s hard to answer, but I became a designer because I like the combination of analysis and creative thinking, sort of combining those two sides of my brain, and to me that’s all part of problem solving. That’s how I describe what I do: solve communication problems. What’s great about facilitating is that I help people do that, I can guide people through that process and help them solve those problems. It’s exciting to me to see that happen and help people get there. Especially when I’ve left meetings and people are like, “I’ve never been to a meeting like that before in my life” and that’s awesome. That feels good to me because not only have I helped them do what they’ve decided to do during that time period, but they are going to carry it forward and make the way they work with other people better, which is pretty awesome.

M: Evangelizing for good meetings. So I wrote a blog post recently, I’m sure you read it about the difference between neutral facilitating and the engaged guide. Being someone who really knows the content, and even maybe has a stake in the decision, versus the ideal that all meeting facilitators need to be completely neutral and they can’t inject they’re own opinions. So which do you prefer? Are you a neutral facilitator or do you like to be and engaged guide?

L: I do think you can be either, and there are different reasons why you would pick one over the other and a lot of it depends on what the nature of what you’re trying to do during that meeting is. I definitely like being a neutral facilitator for a few reasons, one is that I get to learn as part of that. When I go in, and I might not be totally familiar with the content that we are talking about, and I know enough that I can structure the conversations, but I get to learn through the process and that’s kind of fun for me. I also like the part of that where I can sort of unstuck them a little bit. From the standpoint where I am not imbedded in their organization the way

they are, or in the content the way they are, my point of view can help push them in a direction they haven't thought of before.

M: You don't suffer from the curse of knowledge, all those assumption burdens, you can ask the beginner mindset questions.

L: You feel pretty good about that, when you help them move in a direction they might not have gone in before. That's exciting to me, so I guess I would say I prefer it, but I do think that as an engaged guide it's pretty awesome when you have more invested in the outcomes of the meeting so it's pretty awesome to see that happen and be a part of it. It's fuzzy to find out at what point do you talk, and what point do you listen, but it's pretty cool to be a part of it when you have something invested in the outcomes.

M: Thank you so much for taking time out of your very busy schedule to join me here today, and thank you to all of you for tuning in, if you want to learn more about using visual thinking for meetings you can visit our website, ThoughtForm.com, where you will see a white paper about visual thinking for meetings, the blog post I just referenced, and some other blog posts about how we do facilitation, how we plan meetings and agendas. If you like this video, you can tune in again next month when we'll be talking about brand voice.

Thank you all again, and we will see you next month!