MPI

Meeting Design:
The What, Why and How

By John Nawn
of The Perfect Meeting

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ASK THE LAYMAN WHAT A MEETING PLANNER DOES, and you'll receive a long list of operational tasks—marketing and promotion, budgeting, site selection, negotiation, travel arrangements, catering, reservations, registration. And while these are certainly important responsibilities (meetings can't take place without them), they only play a supporting role to why most people attend meetings and events: education and networking. Making sure logistics support this higher purpose is the domain of **meeting design**.

INTRODUCTION

We all know TED. It's one of the most successful meetings in the world, by any measure. Why? Because of its design, orchestrated by one Richard Saul Wurman, an architect, graphic artist and pioneer in the practice of making information easily understandable and who coined the term "information architecture."

> " I started by subtracting, reducing it down to its most essential elements. I subtracted the lectern, which was just there to protect your groin. I subtracted speaking time to 18 minutes to better focus on the message and the messenger. And I subtracted PowerPoint to focus on the spoken word and storytelling, although it's crept back in. "
>
> Richard Saul Wurman,
> on how he designed TED

The TED Conference is attended by the greatest minds of our times across nearly every discipline, inspiring millions of lives and spawning a number of related ventures—TEDx, the TED Prize, TED Books. None employ a single meeting professional.

Wurman's quote is based on the design principle "less is more," championed by architect Ludwig Mies van der Rohe and the unofficial mission statement of the Minimalist design movement, which began in the 20th century and survives today. The movement set out to strip things down to their essential ingredients. It was a reaction to more ornamental design practices that added details and decorations to objects for no particular purpose, other than aesthetics. Likewise, meeting design limits resources with sight on what matters most: attendees.

No one is quite sure who coined the term "meeting design," but MPI RISE Award winner Maarten Vanneste is widely credited with popularizing it in his book,

Meeting Architecture, a Manifesto (2008), in which he proposes a new way of thinking about meetings and events that focuses on alternative formats, delivery styles, content and other oft overlooked and underutilized elements that contribute to the attendee experience. Vanneste says that by embracing a more inclusive and comprehensive vision of meetings and events, their true business value and potential as change agents will be realized.

Seeing its transformational potential, MPI engaged The Perfect Meeting and Association Insights to launch the most comprehensive international study of meeting design to date. The team interviewed 230 people around the world, primarily meeting professionals (both planners and suppliers), but also learning and design professionals. It also conducted a number of informal interviews at industry events, reviewed the small but growing body of knowledge found in industry publications, such as MPI's *The Meeting Professional* and studied relevant research and literature from non-industry sources in the fields of learning, psychology, sociology, neurobiology, ethnography and anthropology.

In addition to formal interviews, the researchers conducted a number of informal interviews at industry events, such as MPI's World Education Conference and European Meetings and Events Conference.

The results revealed that widespread adoption of meeting design has been hindered by a lack of popularly accepted models, methodologies, tools and techniques that typically characterize other design disciplines. The term itself is not widely known outside a relatively small group of committed individuals and others who have heard the term but do not know much more about it.

Still, many agreed that meeting design represents one of the few opportunities to enable meeting professionals to do more with less, which has become the "new normal" in the meeting industry, according to many sources including MPI's own *Business Barometer.* Meeting design has proven to reduce costs and increase value by focusing on what matters most to both participants and stakeholders.

Recent advances in the development, design, delivery and evaluation of formal

and informal learning can be beneficial to meeting professionals, as can ideas from the world of design, which has become a strategic differentiator in today's marketplace.

As with any product or service, designing a meeting demands the exploration of the aesthetic, functional, economic and sociopolitical dimensions of both the meeting process and its outcomes. It can also involve considerable research, thought, modeling or prototyping, adjustments and redesigns. The design profession itself has diversified in recent years, branching into new disciplines that offer tremendous opportunity for meeting professionals in terms of experiential, environmental, sensory and emotional design.

DEFINITION

One of the key objectives of this research was to define the term "meeting design." It has often been used interchangeably with "meeting architecture," which has contributed to some confusion in the marketplace and perhaps hindered adoption. Meeting architecture is far more common in Europe, where its founder is based, while meeting design has its base in North America.

Vanneste defines meeting architecture as "the discipline concerned with objective-based design, execution and measurement of content and format of meetings and events." Design is one stage of Vanneste's meeting architecture process, which includes the following.

- Identify meeting objectives
- Design the meeting based on those objectives
- Execute the meeting
- Assess the meeting results

There is no agreed upon definition of meeting design. However, subject matter expert Mary Boone proposes the following: "Meeting design is the purposeful shaping of both the form and the content of a meeting to deliver on crucial business objectives."

According to Boone, meeting design

of relevant stakeholders before, during and after a meeting. Good design integrates the meeting with other communication activities, maximizes interactivity and results in a significant return on investment.

Meeting architecture treats the identification of meeting objectives and design as separate stages. For meeting design, these steps are inclusive. The meeting architecture process also separates out meeting execution, but defines it as implementation of the design strategy. In meeting design, execution or implementation is assumed.

Followers and practitioners of meeting architecture have committed to developing a theory and practice-based curriculum for educational institutions to train the next generation of meeting professionals. Meeting designers, while supportive of these efforts, are not actively pursuing them.

BUSINESS GOALS & MEETING OBJECTIVES

Regardless of nomenclature, our research shows the value of determining business goals and meeting objectives is indisputable. This process is a key differentiator between meeting planning and meeting design—and it's the starting point to designing a meeting. Traditional meeting planners indicate that they don't typically identify goals or objectives—despite the emphasis on this in industry textbooks and coursework and the significant and long-standing efforts to educate the marketplace regarding the importance of calculating return on investment (ROI). (See MPI's research and tools for meetings measurement at **www.mpiweb.org/bvom**.)

In practice, identifying goals and objectives requires meeting professionals to engage with stakeholders and ask them about their expectations beyond creating a satisfactory experience. Often these conversations simply don't take place. Meeting stakeholders and professionals take refuge in repetition, and the former often treat the latter as little more than order takers. When pressed, attendees aren't any better at articulating their own goals and objectives.

But, powerful forces are introducing change. New economic realities demand that meeting owners ask what they're getting for their investments of time and money, and the relentless march of technology challenges meeting professionals to be more strategic and less logistic in order to answer questions of value and ensure they're not outsourced or replaced by an app.

Attendee expectations are also evolving. Standards for engagement are influenced by the just-in-time, personalized experiences they enjoy every day as consumers. With so much competing for attendee mind-share, the meeting industry is in a race for relevance.

THE MEETING DESIGN PROCESS

While there is no universally established and adopted process for meeting design, and much variability still exists, most practitioners agree upon the following steps.

1. Identify stakeholder needs. Successful meetings and events require the involvement of a wide variety of stakeholders—from participants/attendees and exhibitors to partners, sponsors and owners. While all stakeholders share an interest in a successful outcome, each group has its own needs. The more meeting professionals understand about their stakeholders' unique needs, the better they can design a beneficial event.

2. Define goals and objectives. Stakeholder needs must be translated into business goals and meeting objectives. This helps in designing the meeting experience, and it's indispensible to determining the value of that experience.

3. Select a phase. There are many ways to design a meeting experience, and most designers focus separately on each meeting phase (before, during, after). Some design interventions (or action items) will be specific to a phase, like communicating with your attendees in advance. Others may apply across phases, like engagement or interactivity strategies. Designers make sure their interventions are complimentary across phases and don't conflict or

compete with each other.

4. Select a classification. Meeting designers need to organize their design interventions. Classification helps focus attention and minimizes the risk that some opportunity might be overlooked. (For more on design classifications, see the how-to guide.)

5. Select an element. Selecting a specific meeting element allows meeting designers to explore all possible options for leveraging a particular element or combination of elements.

6. Develop design interventions. Here, meeting designers combine the steps above in traditional and novel ways, creating unique experiences that help them accomplish goals and objectives.

While not the only way of approaching meeting design, these steps make the task of developing design interventions easier and increase the likelihood that meeting professionals consider all possible options.

INNOVATION

Another key finding: The focus is innovation. The manners in which meeting professionals plan and execute events have not changed much in decades, due mainly to the traditional emphasis on logistics. Now, if your objective is to feed an army, logistics provides an appropriate solution; if your objective is to feed the minds of that army and improve its performance, logistics is woefully inadequate. Meeting professionals are well versed in the "gather," but remain weak in "purpose."

What is clear: Regardless of ownership, meeting professionals are positioned to assume credit when meetings go well and assume blame when they don't. As long as meeting professionals define themselves by their ability to manage logistics, they will remain marginalized by a largely self-imposed, limited scope and vulnerable to criticism for not delivering on a meeting's unspoken promises. This is the dilemma most meeting profession-

MEETING DESIGN PRINCIPLES

All design professionals, facing similar tactical versus strategic dilemmas, rely upon principles as guides. These principles dictate how elements should be treated or arranged in order to accomplish a particular purpose or effect. A meeting design principle is a rule or standard used for creating gatherings of people with a common purpose.

The following meeting design principles, derived from MPI's research, can be used as building blocks for design interventions.

PRINCIPLE OF ASSESSMENT & EVALUATION

Set clear, measurable goals before you begin designing your meeting so that afterwards, you can determine your return on investment. Assessment and evaluation are bookends that give meaning to all other meeting elements. Without these, other fundamentals will be at risk or fail.

Examples: Pre-event surveys that identify stakeholder needs, onsite focus groups for feedback on products or services, post-event follow-up to determine application of learning to the workplace.

PRINCIPLE OF MEANINGFUL ENGAGEMENT

Connect with other people, physically, intellectually and especially emotionally. Emotionally engaged people perform better and have higher job satisfaction. Meetings should not be impersonal affairs during which strangers are thrown together and left to fend for themselves. We are social beings who need connections, especially in times of challenge.

Examples: Networking opportunities that facilitate interaction between like-minded individuals, story-based formats for educational sessions that are easier for individuals to relate to and apply to their jobs.

Principle of Distributed Learning

Provide people with the information they need to know when they need to know it in a manner that's convenient for them. The top two reasons people attend meetings are the educational programs and the networking. In the language of education professionals, that's formal and informal learning, and the latter trumps the former when it comes to knowledge retention and transfer—which is really what it's all about. Also, think about distributed learning in terms of when it occurs: before, during or after the event.

Examples: Pre-event webinars with subject matter experts to customize presentations, a virtual component for remote attendees, continuing conversations via social media platforms post event, informal learning experiences that allow for peer-to-peer education.

Principle of Collaboration

Tap into the collective intelligence of the group to better understand its needs, generate new ideas, determine best solutions and put plans into action. One of the key reasons people meet is to address some goal, challenge or problem. And in that pursuit, the wisdom of the crowd is an invaluable resource. Inherent in every meeting, is the opportunity for change, progress and innovation.

Examples: Meeting-wide brainstorm sessions around key goals or challenges, large-scale advocacy campaigns around initiatives that align with an organiza-tion's mission.

Principle of Experience

Design a meeting with the participant in mind—not just in selling a product or providing a service, but also in creating a meaningful and memorable experience. The world is awash in bad design. Meetings are no exception.

Examples: Welcome receptions in registration that create great first impressions, experiential learning sessions using offsite venues.

Conclusion

Meeting design challenges the status quo. It represents a paradigm shift—a profound change in the fundamental meeting model that sees every meeting challenge as a nail for the proverbial hammer of logistics. Logistics is building a house; meeting design is making that house a home.

However, meeting professionals have been slow to embrace the latter. The good news is that meeting professionals are process-oriented, and meeting design is simply a new process that can be taught, learned and applied in ways that can greatly enhance the meeting experience.

There will always be a need to focus on logistics. No meeting of consequence should be undertaken without logistical experts who do what few others can, saving stakeholders substantial time and money.

But meeting participant needs are evolving beyond satisfying their basic needs for food, shelter, safety, proximity to others and exposure to information. (See MPI's research into the future of meetings.) Attendees want innovative, unique experiences that challenge their senses, their expectations, their knowledge and their ideas. Fulfilling on that is the ultimate value of meeting design.

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PSAV provides in-house audiovisual services for more than 800 properties around the world that want to keep their clients coming back for memorable events and meetings, year after year. PSAV brings years of real- world knowledge from thousands of events and meetings. PSAV also owns and operates one of the largest, most up-to-date equipment inventories in the industry. From high-definition projectors to huge plasma screens to futuristic digital signage, PSAV provides all your event technology solutions. Visit **www.psav.com**.

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About the MPI Foundation
The MPI Foundation is committed to bringing vision and prosperity to the global meeting and event community by investing in results-oriented initiatives that shape the future and bring success to the meetings and events community. For more information, visit **www.mpifoundation.org.**

About The Perfect Meeting
The Perfect Meeting is an experiential design firm committed to optimizing the meeting attendee experience. The Perfect Meeting advises meeting stakeholders on learning and engagement strategies, the future of meetings and related issues.

About Association Insights
Association Insights provides research and consulting services to nonprofit organizations and helps them find solutions and make better decisions.

MPI

Meeting Professionals International (MPI) is the largest meeting and event industry association worldwide. Founded in 1972, the organization provides innovative and relevant education, networking opportunities and business exchanges, and acts as a prominent voice for the promotion and growth of the industry. MPI has a global community of 60,000 meeting and event professionals including more than 17,000 engaged members and the Plan Your Meetings non-traditional meeting planner audience. It has more than 90 chapters and clubs in 24 countries.

For additional information, visit www.mpiweb.org.

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Your Meeting Design Deliverables

The prevailing wisdom among meeting professionals is that they're in the logistics business. But not all. A growing number say they're actually in the performance improvement business, that their job doesn't end once they've planned the meeting, that it's only just begun.

These professionals say that in order for meetings to remain relevant, they need to contribute to something greater for the individuals who attend them and the organizations that sponsor them. And meeting design provides them with a way to manage costs and increase value.

THE POWER OF DESIGN

Increasingly, companies are turning to design, in all its manifestations, to develop new product, services and user experiences that drive growth opportunities. Indeed, some of the most successful brands in the world today such as Siemens, Procter & Gamble, Nike, Facebook and McDonald's are positioning design at the forefront of innovation.

Consider Apple. As the most successful company of all time (in any industry), it makes a surprisingly small number of products (less than 50); 17 of which are software and 16 of which are accessories. This allows the company to focus its resources on creating products that consistently outperform competitors for which they can charge a healthy premium. And now, because of its size, it can purchase raw materials in such quantities at such favorable prices that it leaves competitors at a disadvantage in trying to bring similar products to market. For all practical purposes, Apple has cornered the market on the raw materials required to produce technology products.

At the time this guide was produced, Apple's book value was approximately US$30 billion, but its market cap was more than $418 billion (*The Wall Street Journal*, January 2012). What accounts for that difference of almost $390 billion? Design. "Taking design as seriously as most companies take strategy creates more value for Apple in a year than most companies create…ever," wrote marketing pro Umair Haque in the *Harvard Business Review.*

It marks what's possible when design is taken seriously and treated accordingly.

Companies of all sizes are seeing positive results from design as strategic business imperative. And this is precisely why meeting design must be taken more seriously by meeting professionals.

THE DEFINITION

There's no simple definition of the word "design." The noun form implies a finished product, created from certain elements, intended to accomplish a particular purpose. The verb denotes a plan or road map that outlines specifications, aesthetics, as well as social, economic or environmental constraints in achieving an objective. The lack of a concise definition and process has inhibited the adoption of design thinking as a more serious discipline among meeting professionals.

Historically, meeting design has been synonymous with event design, which focuses on creating a cohesive look and style that is carried throughout every meeting detail. Event design still garners a lot of respect among meeting professionals for its focus on aesthetics. By weaving together traditional design elements (texture, line, shape and color) with design principles (balance, emphasis, unity and repetition), event designers create an experience that is greater than the sum of its parts.

But more recently, meeting design has begun to refer to how to conduct effective business meetings using an entirely different set of elements and principles.

Design expert Mary Boone of Boone Associates defined the method as "the purposeful shaping of the form and content of a meeting to achieve desired results." The word "purposeful" is key here. Design professionals note that most meeting pros

make design decisions everyday without realizing it. "The alternative to good design isn't no design, it's bad design," notes Douglas Martin, the creative director for DM Factory. "And good design is simply the result of making these decisions consciously."

Meeting professionals are no strangers to making decisions, many of which can be categorized as design decisions (whether they are conscious of them or not). They are responsible for making hundreds if not thousands of decisions, big and small, which have an impact on the meeting experience. But they are first to acknowledge that the consequences of these decisions are not always perceived as intended. And therein lies one of the biggest dilemmas surrounding meeting design—the outcome is often subjective. Meeting design practitioners make conscious decisions in an attempt to positively influence that meeting attendee experience. Whether they are successful is not entirely within their control. Still, most meeting professionals are comfortable taking that risk and are more often than not, rewarded for it, according to MPI's recent research, of which this is part.

Whether we're talking about small "m" or large "M," meetings share a common framework. Generally speaking, well-designed meetings adhere to best practices around these fundamentals.

- **Determining objectives.** Setting goals and objectives, and corresponding criteria, are critical to determining meeting success.

- **Developing agendas.** These road maps to meetings establish buy-in and keep the meeting on track so time is used effectively.

- **Assigning roles and responsibilities or setting expectations.** Most meetings have leaders, participants, presenters or facilitators and recorders. These functions ensure a smooth meeting process.

- **Effective facilitation or presentation formats.** Most meeting challenges are process-oriented. Using effective facilitation and presentation techniques help keep the conversation flowing.

- **Selecting a decision-making method.** If a decision needs to be made, event pros must identify a method by which they can

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define the challenge, determine why it exists, identify possible solutions and develop implementation plans.

- **Follow-up activities.** This is often the most important, and most neglected step in any meeting process. These methods insure the likelihood of a successful meeting and/or implementation.

Today, meeting design, as practiced by a wide variety of professionals in the industry, represents a return to these meeting fundamentals. It's essentially a process for determining answers to the questions:

- Why are we meeting?
- Who needs to be there?
- What do we want to accomplish?
- How will we know we accomplished it?

Questions like these serve as a starting point for meeting designers. With this information in hand, they can begin to apply design principles and leverage traditional and non-traditional meeting elements to create a more memorable, engaging meeting experience.

These questions can be used to help develop design interventions for your meeting or event.

1. What are the business goals?
2. What are the meeting objectives?
3. How will we determine the meeting's success?
4. What type of environment and environmental elements support the meetings goals and objectives?
5. How can we create a better learning experience?
6. How can we influence an attendee's emotional state?
7. How can we stimulate an attendee's senses?
8. How can we facilitate more engagement with, and among, our attendees before, during and after the meeting?

THE PROCESS

There is substantial disagreement among design professionals regarding the process of design, but it can be organized into two basic but fundamentally different schools of thought.

The Rational Model suggests that design can be broken down into stages that follow a "rational" approach, from research and analysis, development and testing, implementation and evaluation and finally redesign, where all the previous stages are repeated and design improvements are made.

The alternative is the Action-Centric Model, which argues that most designers simply don't think rationally about design and the design process. In this model, designers rely more upon creative thinking, problem solving and improvisation. These are inextricably linked, but are not treated as independent, orderly steps.

These two design process models are at the core of an argument among meeting professionals as to whether meeting design represents an extension of the meeting professional's existing skill set or whether it represents a radical departure, requiring new skills and perhaps requiring new job descriptions and new responsibilities.

While there was no consensus among those surveyed for this research regarding meeting planner or designer roles, it was clear that there is a need for both planner and designer skill sets in order for meetings to be perceived as more strategic and value-oriented. Meeting planners are primarily process-oriented but are quite capable of being creative. Meeting designers may be more creative on balance, but that doesn't mean they are not capable of following a process that might result in a better meeting experience. As meetings expert Joan Eisenstodt aptly put it, "It really doesn't make a difference whether you call yourself a meeting planner or a meeting designer, it's the end result that matters."

Ultimately, what is required to move the discipline of meeting design forward is to identify a process or processes that can be

understood, taught and easily replicated. That is the focus of this guide. Here's what the research points to.

1. Identify stakeholder needs.
2. Define goals and objectives.
3. Select a meeting phase: before, during or after the meeting.
4. Select a taxonomy.
5. Select a meeting element.
6. Develop design interventions (apply the taxonomy to an element keeping in mind key goals and objectives).

1. Identify Stakeholder Needs

The meeting design process starts with understanding the needs of your stakeholders, from participants to sponsors to partners. Each stakeholder group may have different needs, so ask discriminating questions and prioritize the needs of each group. Without this, you risk alienating a key constituency, which you cannot afford to do. Determining needs is not something to guess at. Traditional survey research tools and techniques are perfectly suited for this purpose.

(For more info on identifying meeting stakeholders and determining their needs, see www.mpiweb.org/bvom for a white paper on stakeholder commitment.)

2. DEFINE GOALS AND OBJECTIVES

Once you have an understanding of needs, use them to identify the unique goals and specific objectives for your meeting or event. Goals are general, long-term aims that you want to accomplish. Objectives are the specific, measurable steps you'll take to get there. The important thing to keep in mind is that without objectives, you can't determine if your meeting is successful or whether it provided any business value. Needs-based goals and objectives are the most critical component to meeting design. Many see this as a key differentiator between how planners and designers operate. For more info on this, see www.mpiweb.org/bvom for a white paper on defining objectives.

3. SELECT A MEETING PHASE

A common approach to planning divides a meeting into three distinct phases: before, during and after. These phases provide a familiar frame of reference for professionals and non-professionals alike and allow for clearer communication among implementation teams.

4. SELECT A TAXONOMY

A taxonomy is a way of organizing or classifying things, like design interventions in the case of meeting design. As a relatively young discipline, meeting design can be said to involve equal parts art and science. To date, there's no consensus among meeting professionals regarding how they design their meetings. There are, however, a variety of taxonomies meeting professionals apply when developing design interventions. Some of the taxonomies are more developed and robust than others. A number of them can be found in Appendix A.

5. SELECT A MEETING ELEMENT

Meeting elements are the essential ingredients from which successful meetings are made. They are tools that can be used strategically to support the goals and objectives of the meeting and enhance the overall attendee experience. Some elements are fairly static and stable over time, others are constantly evolving, leading to incremental and sometimes exponential innovations in how meetings are designed and experienced. There are many different kinds of elements: time, location, venue, food and beverage, audiovisual. Each may have multiple characteristics. For example, time may refer to the length of your meeting, how frequently you meet, the time of year you meet, or even what time of day you meet. For a more complete list of meeting elements, see Appendix B.

6. DEVELOP DESIGN INTERVENTIONS

Once you have completed the previous steps, you are ready to develop your design interventions, or decide how you will use meeting elements to produce your desired results. The convergence of meeting phase with taxonomy and elements entails a large matrix of options. There are infinite possible outcomes. The quantity and quality of interventions varies according to the designer's level of expertise, budget and a myriad of other factors. For examples of design interventions, see Appendix C.

CONCLUSION

Like many professionals, meeting planners find themselves at a crossroads, brought on by social, economic, environmental and technological changes. Many believe planners should not assume more responsibility for the form and contents of meetings and events. Others believe that meeting professionals can no longer afford to abdicate a seat at the table and that simply working harder must yield to working smarter. They say that the tactical thinking of the past must make way for the strategic thinking that's so critical to success in today's business environment.

Meeting design encompasses a wide variety of interventions that aim to enhance the attendee experience, and most designers follow a process or framework when developing these.

Meanwhile, the number of tools and techniques that support meeting design are finite. The way those tools can be employed are infinite. And because no two meetings are going to share the same goals and objectives, each design intervention contributes to a unique and customized experience. Experiences like these determine the individual and organizational value of meetings.

Appendix A:
Meeting Design Taxonomies

While the vast majority of meeting professionals involved in MPI's research didn't report using a particular taxonomy when designing their meetings, the interviews did uncover a few that may prove helpful.

MAP

Maarten Vanneste, author of *Meeting Architecture, a manifesto,* outlines a framework for meeting effectiveness. The four-phase Meeting Architecture Process (MAP) includes identifying the objectives, designing the meeting, executing the meeting and assessing the results or outcomes. The design phase of meeting architecture suggests using a suite of tools categorized as:

- Conceptual. Alternative meeting formats combined with complementary room layouts

- Human. Facilitators, graphic illustrators, actors

- Artistic. Theme, design, video production, creative opening show

- Technical. Audiovisual, set and staging, flip charts, pen and paper, signage, white boards, wall posters

- Technology. Web-based group-ware, smartphone apps, cybercafés, decision-support or other collaborative systems, networking technology

These tools are used strategically to support the meeting professional in developing more effective and engaging meetings. The Meeting Support Matrix® (below) can be used to identify which tools, concepts or techniques can be utilized to support meeting objectives. Vanneste suggests this is a good starting point in designing meetings and serves to help structure your thinking.

		Conceptual	Human	Artistic	Technical	Technological
LEARNING	Before During After					
NETWORKING	Before During After					
MOTIVATION	Before During After					

MEETING DESIGN PRINCPLES

Principles are another taxonomy commonly used in the design world. Principles dictate how elements can be treated or arranged in order to accomplish a particular purpose or effect. A meeting design principle is essentially a rule or standard used for creating a guide for gatherings of people with a common purpose.

These Meeting Design Principles are derived from MPI's interviews with meeting professionals. They can be used as an organizing taxonomy or building blocks for creating design interventions.

MEETING DESIGN PRINCIPLES

Meetings are produced, marketed, sold and consumed like products, and like many products, they can become stale and outdated. Think like an experience designer, leverage the elements that go into planning a meeting and throw in a few new ones for good measure. Start with these meeting design principles—derived from MPI's research into meeting design. This handout can be used in conjunction with the Meeting Design How-to Worksheet.

PRINCIPLE OF ASSESSMENT & EVALUATION

Set clear, measurable goals before you begin designing your meeting so that afterwards, you can determine your return on investment. Assessment and evaluation are bookends that give meaning to all other meeting elements. Without these, other fundamentals will be at risk or fail.

PRINCIPLE OF MEANINGFUL ENGAGEMENT

Connect with other people, physically, intellectually and especially emotionally. Emotionally engaged people perform better and have higher job satisfaction. Meetings should not be impersonal affairs during which strangers are thrown together and left to fend for themselves. We are social beings who need connections, especially in times of challenge.

PRINCIPLE OF DISTRIBUTED LEARNING

Provide people with the information they need to know when they need to know it in a manner that's convenient for them. The top two reasons people attend meetings are the educational programs and the networking. In the language of education professionals, that's formal and informal learning, and the latter trumps the former when it comes to knowledge retention and transfer—which is really what it's all about. Also, think about distributed learning in terms of when it occurs: before, during or after the event.

PRINCIPLE OF COLLABORATION

Tap into the collective intelligence of the group to better understand its needs, generate new ideas, determine best solutions and put plans into action. One of the key reasons people meet is to address some goal, challenge or problem. And in that pursuit, the wisdom of the crowd is an invaluable resource. Inherent in every meeting, is the opportunity for change, progress and innovation.

PRINCIPLE OF EXPERIENCE

Design a meeting with the participant in mind—not just in selling a product or providing a service, but also in creating a meaningful and memorable experience. The world is awash in bad design. Meetings are no exception.

GEORGE P JOHNSON'S SIGNATURE EXPERIENCES

These core concepts and practice activation tips create transformative experiential marketing opportunities, but can be easily applied to creating more experiential meetings and events. They facilitate brainstorming of new and innovative meeting design interventions.

ENGAGE. We're technology-rich but experience poor. Give people tools and experiences to a deeper understanding of the world around them. By understanding the world around them, they'll make better, more informed decisions. (SOURCE: Interactive experience and museum designer Frank Oppenheimer, founder of Exploratorium)

TIP: Build content-driven experiences.

• Content is the capital and medium of exchange.
• Technology and learning design are the means by which content is presented.
• Physical and digital experience design rounds out the experience environment.

Too often, marketers begin with the tools before considering the story they can't activate. Start from the inside out. Make sure you know what the story and the audience are before you employ the delivery tools and technology.

INFORM. Multisensory learning is active learning. Multiple modes of sensory input provide neuronal stimulation to various regions of the brain, which, in turn, store information in separate locations. There is a lot of communication among these locations. It's more difficult to become distracted when the brain is exposed to multiple modes of stimulation. Maximize information processing by using multiple channels to maximal stimulation to the brain and increased storage. (SOURCE: *Cognitive Learning*, Cora M. Dzubak, Pennsylvania State University)

TIP: The conventional general session format is not multisensory learning. Spoken words compete with on-screen text and charts. We tend to tune out the speaker, while we try to read and decode slides. True multisensory learning involves sight, sound and touch in ways that reinforce each other.

DISCUSS. "Read and recall" is not enough; you need to let people practice. There have been many studies showing that even when people recall information or facts they don't necessarily apply them and actually do their jobs better. (SOURCE: *Education and Learning*, Jane Hart, social media and learning consultant)

TIP: Practice makes learning sticky. Practice is the essential step in transferring learning from the classroom into life. Breakout sessions, labs and roleplaying are ideal situations for practice. But practice must continue beyond the meeting for learning to be useful in our daily lives.

PERSUADE. Give your audience a compelling reason why it should do as you suggest. These 16 basic desires form all of our personalities and are the foundation for all our behavior. (SOURCE: *Sales and Marketing*, Tony Jones, author, *Life is a Series of Presentations*)

Power   Social Contact   Eating   Saving
Independence   Vengeance   Tranquility   Honor
Curiosity   Romance   Physical Activity   Idealism
Acceptance   Status   Order   Family

TIP: Tap into the desires that move people to take action. Why should people do as you ask? What's in it for them? People act based on incentives—either negative or positive. Your message must not only include a clear call to action, it must also highlight the potential rewards of their participation.

INSPIRE. It's OK to be wrong. No progress will happen without taking the risk of being wrong. People want to feel that their ideas are valued and respected. Learning environments must be safe in order for the participants to explore new ways to address challenges. (SOURCE: *Education and Learning*, Ron Gross, professor, seminars on innovation, Columbia University)

TIP: Build trust and empathy with your audiences at every step. Begin by asking for an opinion or have your audience help choose and shape the agenda in pre-event communications. Once onsite, listen to and capture their needs and ideas, rather than lecture to them about your offerings. Then, after an event, let them know you heard their needs by reinforcing what they told you and planning next steps. And remember, in terms of answers, one size may not fit all.

MODEL OF EXPERIENCE

Larry Keeley is a well-known innovator. He developed a model of experience that was originally used by product development specialists in redefining the user experience, but it has also been adopted to design meetings. Keeley's model of experience looks like this:

• Attracting (attendance building)
• Engaging (audience interaction)
• Extending (meeting follow-up)

For each design intervention, Keeley's model identifies six possible attributes or criteria to meet.

• Defined
• Fresh
• Immersive
• Accessible
• Significant
• Transformative

Dick Axelrod, author of *Terms of Engagement: New Ways of Leading and Changing Organizations,* developed his own design considerations he uses for planning meetings.

• Purpose
• Digestion
• Content Placement
• Connection
• Learning
• Timing

Finally, another, less-developed model, which bears some resemblance to Keeley's experience, is simply referred to as the Five Elements:

• Enticing
• Entrance
• Engage
• Exit
• Extension

Appendix B:
Meeting Elements

This partial list of meeting elements can serve as inputs or variables around which you can design your meeting.

- **TIME**
  - Time of the year
  - Frequency
  - Number of days
  - Hours in the day (vs. other corresponding activities)
  - Time of day
  - Time for reflection
  - Free time or downtime

- **LOCATION**

  Often, logistical considerations—such as the number of attendees or required session rooms—determine a subset of options. Meeting designers are attuned to the ecosystem surrounding venues and leverage the various resources each unique location has to offer.

- **VENUE**

  Venue options are often dictated by similar logistical considerations. The operative word in venues among meeting designers is "flexibility." While, generally, smaller venues allow for greater flexibility in terms of room configurations, even large venues are adapting to the changing needs of their customers. Conference centers, while not ideal for all groups, represent a middle ground between hotel-based meeting rooms and convention centers in terms of intimacy.

- **ENVIRONMENT**

  Environment is a broad term that can refer to the ecosystem surrounding a venue or the internal settings or atmosphere within the venue. In both cases, it requires optimizing key elements such as institutions or speaker resources (external) or open spaces and furniture (internal) in ways that enhance the meeting attendee experience.

- **FOOD AND BEVERAGE**

  A longtime staple of meetings and events, meeting professionals are conscious about making smart F&B choices that are both healthy and help attendees remain alert and more engaged throughout the day.

- **AUDIOVISUAL**

  Another longtime staple of meetings and events, meeting professionals are now using AV more strategically to help create stronger sensory experiences. This can range from the simple (introducing more music throughout a venue to influence mood and energy levels) to complex (using large, background projections and other lighting effects that alter environments).

- **COLOR**

  One of the most underutilized or perhaps misunderstood elements available to meeting professionals is color. The intentional use of color can have beneficial effects on the emotional and social well being of meeting attendees.

- **SOUND**

  Sound is another element that can influence attendee emotions. Music can not only express emotion, it can produce emotion as well. And it's capable of evoking several emotions at once. But, while general sessions or receptions are where we typically hear (too loud) music, session rooms and public spaces represent new opportunities to enhance the participant experience.

- **TECHNOLOGY**

  While some meeting professionals are scaling back the use of meetings-related technology in order to emphasize emotional connections among meeting attendees, others are using virtual and social media platforms to facilitate connections and greater engagement with and among remote audiences. They're enlisting meeting apps such as SpotMe, SwarmWorks, Wizerize, and the like to facilitate more connections and to engage participants during and between sessions.

- **FORMAL LEARNING**

  There has been a steady increase in the use of participant-centric educational session formats and this area is evolving rapidly. Pecha Kucha, fishbowls and unconferences along with facilitated conversations allow meeting attendees to learn as much—if not more—from their peers as they do from traditional speakers and other subject matter experts.

- **INFORMAL LEARNING**

  More effective than formal learning in terms of knowledge retention and transfer to the job, meeting professionals are incorporating free time and open spaces for meeting attendees to convene and discuss mutual topics of interest to them.

- **COMMUNICATIONS**

  Even before the advent of social media, meeting and event marketers began to be more sophisticated in their messaging prior to a meeting or event. Follow-up communications are critical to maintaining dialog with audiences. Our always-on culture and the need for just-in-time learning require meeting professionals to take a more comprehensive approach to communication strategies before, during and after meetings.

- **SPONSORSHIP**

  Traditional sponsorship activation methods such as signage and ads are not as effective as they have been, requiring meeting professionals to be more creative in how they convey and communicate value between sponsors and audience. Meeting designers are asking what kinds of unique experiences they can create for sponsors that will help them better connect with their prospects or customers.

Appendix C:
Meeting Design Interventions

Meeting design begins with an open mind, a respect for how meetings are conducted and a willingness to challenge the status quo. Above all, meeting design places the needs of the attendee first. A common framing question meeting designers ask is, "What is the attendee experience and how might it be improved?"

1. Start by reviewing your objectives.
   - What are the business objectives of the meeting (generate sales leads, build stronger customer relationships, boost company morale)?
   - What are the specific meeting objectives (introduce a new product or service, hold focus groups and networking with key customers, create team-building activities)?

   The better grasp you have of organization goals and specific objectives, the better you'll be able to design interventions to accomplish them. Goals and objectives are like a road map for meeting professionals. Without them, any meeting will get you there.

2. Next you need to focus on a particular phase of your meeting: before, during or after. Most meeting professionals start at the beginning, but feel free to jump back and forth among the phases. (For example: if you want to have deeper conversations during the meeting, what can you do before the meeting to support that? Perhaps introduce key goals, challenges or opportunities and ask for feedback from your audience beforehand.)

3. Now you're ready to select a taxonomy. Keep in mind that using taxonomies is not a requirement. They're simply guides to help organize your thinking. Some meeting professionals may not need a taxonomy to brainstorm interventions. Others will find their structure beneficial.

4. Finally, select a meeting element and brainstorm how the element interacts with a taxonomy dimension and a meeting phase to create something unique that maps to your key goals and objectives.

EXAMPLE

Before the Meeting
Goal/Objective: Build Community
Principle: Engagement
Element: Technology
Design Intervention:
To foster more engagement before the meeting, poll the prospective audience about the greatest challenges they're facing and what, if any solutions they've tried. The resulting database can serve as an online suggestion box for programming, collective problem solving and identifying current and future needs.

During the Meeting
Goal/Objective: More Applied Learning
Principle: Distributed Learning
Element: Informal Learning
Design Intervention:
To facilitate more applied learning, create more informal learning opportunities. Structure informal learning to emphasize actionable takeaways and support a system for follow-up.

After the Meeting
Goal/Objective: Professional Development
Principle: Collaboration
Element: Communications
Design Intervention:
To support more professional development, create a mentoring network based on mutual goals and objectives such as pairing senior and junior project managers or a social media expert with a beginner.

MEETING DESIGN GUIDELINES

1. Identify key meeting stakeholders and prioritize their needs.
2. Identify business goals and meeting objectives of your key stakeholder groups.
3. Identify measures or metrics tied to objectives.
4. Select a meeting phase to focus on (before, during or after).
5. Select a taxonomy to help facilitate your brainstorming (optional but recommended).
6. Select a meeting element.
7. Generate design ideas.
8. Select another meeting element and repeat.
9. Rank ideas by a criterion (most to least impact on business or meeting objectives).
10. Develop implementation plans.
11. Collect and analyze evaluation data and make recommendations to stakeholders for further improvements.

MEETING ELEMENTS
- Location
- Venue
- Environment
- Food and Beverage
- Audiovisual
- Technology
- Formal/Informal Learning
- Communication
- Sponsorship

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Your Meeting Design Learning Programs

The top two reasons people attend meetings and events: Education and networking. Are you designing the former with the same passion and know-how as the latter? This guide can help.

Meeting Design - How-to Guide

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THE PRINCIPLES

Adult learning principles have been in use since the 1950s as a result of the pioneering work done by renowned adult education expert and professor Malcolm Knowles (1913-1997). Your educational programs should align with these principles.

- Adults are autonomous and self-directed. They need to be free to direct themselves. Instructors must actively involve adult participants in the learning process and serve as facilitators for them.

- Adults have accumulated a foundation of life experiences and knowledge. They need to connect new learning to this knowledge/experience base. To help them do so, instructors must draw out participant experiences and knowledge relevant to the topic.

- Adults are goal-oriented. They usually know what goals they want to attain, and they appreciate educational programs that are organized with defined agendas.

- Adults are relevancy-oriented. They must see a reason for learning something—applicability to work or personal value. Instructors must identify objectives.

- Adults are practical. They may not be interested in knowledge for its own sake. Instructors must tell participants how the content will be useful to them.

- Adults need to be shown respect. Instructors must acknowledge the wealth of experiences that adult participants bring to the classroom. These adults should be treated as equals in experience and knowledge and allowed to voice their opinions.

THE GUIDELINES

Learning is primarily a social process that occurs throughout life resulting from sensory engagement. Some people favor one sense more than others, but generally speaking, the more senses you engage, the easier it is to recall and apply learning. Therefore, instructors should present materials that stimulate as many senses as possible.

There are four critical elements of learning that must be addressed to ensure that participants learn.

- Motivation
- Reinforcement
- Retention
- Transference

MOTIVATION

Adult responsibilities place unusual demands on learning—often concerns of time or money. But the lack of motivation can also be a barrier. Typical motivations align with at least six major factors.

- The need for social relationships
- External expectations from a formal authority (boss)
- The ability to serve a community or mankind
- Personal advancement (higher job status, professional advancement)
- The need to relieve boredom or break routine
- Cognitive interest

The best way to motivate adult learners is simply to enhance their reasons for participating and decrease the barriers to participation. Instructors must understand why their participants are attending (the motivators) as well as what is keeping them from learning more.

Instructors must also establish rapport with adult students and prepare them for learning—thus supporting motivation. This can happen in several ways.

- Set an appropriate tone for the lesson with an open, helpful atmosphere.
- Set an appropriate level of concern, depending on the importance of the learning objective.
- Set an appropriate level of difficulty, high enough to challenge participants but not so high that they become frustrated.

In addition, participants need specific feedback about their learning results and a clear reward for learning (which doesn't have to be monetary). The benefit of learning must be obvious in order for adults to motivate themselves to learn the subject.

REINFORCEMENT

Reinforcement is a necessary part of the teaching/learning process. Through it, instructors encourage correct modes of behavior and performance. Instructors who are teaching participants new skills normally use positive reinforcement. Instructors need to use reinforcement frequently, regularly and early to help students retain learnings. Then, instructors should use reinforcement only to maintain consistent, positive behavior.

RETENTION

Participants must retain information from educational sessions in order to benefit from them. Instructors aren't finished until they have helped their students retain information. For this to happen, participants must see a meaning or purpose for that information. They must also understand, interpret and apply it. This understanding includes their abilities to assign the correct degree of importance to the material.

Retention is directly affected by the degree of original learning. If participants didn't learn the material well initially, they won't retain it well either. Retention is also affected by the amount of practice during learning. Instructors should emphasize retention and application. After learners demonstrate correct (desired) performance, they should be urged to practice to maintain the desired performance. Distributed practice is similar in effect to intermittent reinforcement.

TRANSFERENCE

Transfer of learning is the result of training. It's the ability to use information taught in an educational session in a new setting. Positive transference, like positive reinforcement, occurs when participants use the behavior taught in the session to better their jobs, their companies or their careers. Transference is most likely to occur in the following situations.

- **Association.** Participants can associate the new information with something that they already know.
- **Similarity.** The information is similar to material that participants already know.
- **Degree of Original Learning.** The participant's degree of original learning was high.
- **Critical Attribute Element.** The information learned contains elements that are extremely beneficial (critical) on the job.

SMARTIE

When developing educational programs for meetings and events, follow the SMARTIE method.

- S = Student centered. Focus the learning classroom experience on the participants, not the instructor.
- M = Motivation. Keep in mind the importance of answering the adult learner's ever-present question: "What's in it for me?"
- A = Activities. Set aside time for activities that enable your adult learners to participate in learning and practice what they've learned. When learners engage in activities, they are able to internalize what they are learning.
- R = Reinforcement. Include opportunities for your adult learners to reinforce new knowledge and skills.
- T = Transfer. Check that the desired learning points have been internalized. Be sure to provide opportunities for your adult learners to apply their new knowledge and skills to their jobs.
- I = Information chunking. Group the new information presented to your learners in "chunks" of five to seven. Provide opportunities to practice and reinforce this information before moving on to the next chunk.
- E = Environment. Create a comfortable environment that is conducive to learning, respectful of learners and a safe place to make mistakes.

LEARNING STYLES

Learning styles are one of the latest trends at meetings and events—visual, auditory or kinesthetic/tactile. Many experts believe that adults have a dominant style that helps them learn better or faster. Unfortunately, there's no evidence to support the existence of learning styles.

This is not to say that all learners are the same and that differences don't exist. Research does show that ability, background knowledge and interest, which vary from person to person, can affect learning. Developing education along these dimensions, while not as easy as accommodating learning styles, may result in better knowledge retention and transfer, which is really the ultimate objective of learning.

If you are regularly responsible for developing educational sessions or other more involved learning programs, you may be familiar with Instructional System Design (ISD) and the ADDIE process. If you're not, instructional designers can be an invaluable resource in helping you deliver learning that meets your meeting and business objectives.

Instructional System Design is a process for developing educational content. It ensures that your educational content aligns with the desired outcomes in addition to saving development time and money.

The ADDIE model is a popular approach to instructional design. It has five phases: analyze, design, develop, implement and evaluate. Each phase is characterized by a set of activities and deliverables that provides input for the following phase. Outlined next are some activities and deliverables that meeting professionals can adopt.

> Instructors need to use reinforcement frequently, regularly and early to help students retain learnings. Then, instructors should use reinforcement only to maintain consistent, positive behavior.

PHASE 1: ANALYZE

- Clarify organizational and educational objectives.
- Agree on the scope of the educational program.
- Determine strategies for transferring learned skills to the workplace.
- Determine the target participants, program prerequisite requirements, participant characteristics and special needs.
- Determine the extent of participant knowledge.
- Determine the tasks currently performed by target participants and the level of performance required following the program.
- Estimate program design, development, implementation and evaluation costs, effort and schedule.

DELIVERABLE: Training needs analysis

PHASE 2: DESIGN

- Translate educational program objectives into learning objectives.
- Determine program structure and sequence.
- Determine program duration and pace.
- Decide program format and mode of delivery.
- Specify type of participant assessment.
- Determine program evaluation methodology, data collection methods, timing and reporting formats.
- Articulate transfer of learning methods and workplace support.

DELIVERABLE: High-level design document

PHASE 3: DEVELOP

- Develop session plans and trainer and learner guides and resources.
- Develop trainer and on-the-job aids.
- Develop coaching/mentoring guides and resources.
- Develop technology infrastructure and software.
- Develop participant assessments.
- Develop project and program evaluation instruments.
- Conduct pilot program to test that the program meets client needs.

DELIVERABLES: Session plan, trainer guide, learner guide and resources and assessment and evaluation instruments

PHASE 4: IMPLEMENT

- Produce program materials and aids.
- Install technology infrastructure and services.
- Set up administrative databases and systems.
- Install on-the-job aids.
- Prepare coaches/mentors.
- Book venue, accommodation and travel.
- Set up venue and accommodation.
- Schedule participants.
- Conduct training sessions.
- Implement training transfer strategies.
- Conduct participant assessments.
- Collect participant feedback.

DELIVERABLES: Completed participant assessments, attendee forms and feedback forms

PHASE 5: EVALUATE

- Collect training program evaluation data.
- Collect project evaluation data.
- Review program performance (number of participants, participant satisfaction).
- Report program performance results.

DELIVERABLE: Program evaluation report

LEVELS OF EVALUATION

Regardless of whether you put a lot or a little effort into your educational programs, you need to use proper evaluation techniques and strategies if you want to know whether or not they are successful. Program success is not determined by whether participants were satisfied with their learning experience, but whether they retained key information and applied it to their jobs in a way that improved their performance or some key organizational outcome.

Learning programs can be evaluated on several levels. Donald Kirkpatrick introduced a four-level learning evaluation model in his 1994 book, Evaluating Training Programs. Kirkpatrick's model is now considered an industry standard for evaluating learning or training programs. The four levels measure:

- Reaction of participant (what they thought and felt about the training),
- Learning (the resulting increase in knowledge or capability),
- Behavior (the extent of improvement and implementation/application) and
- Results (the effects on the business or environment resulting from trainee performance).

EVALUATIONS

TYPE	Description and characteristics	Tools and methods	Relevance and practicability
REACTION	**How the delegates felt, and their reactions to the experience.** • Did they like the training? • Did they consider the learning relevant? • Was it a good use of their time? • Did they like the venue, style and timing? • What was their level of participation? • What was the ease and comfort of the experience? • What was the level of effort required to make the most of the learning	• "Happy sheets," or feedback forms based on personal reaction to the learning experience. • Verbal reactions that can be noted and analyzed. • Post-event surveys or questionnaires. • Online evaluations or grading. • Subsequent verbal or written reports.	• Can be done immediately after the event. • Not costly to in terms of gathering or analyzing. • Provides discovery of event impressions.
LEARNING	**The increase in knowledge or intellectual capability of delegates.** • Did they learn the intended material? • Did they have the intended experience? • What was the extent of change?	• Assessments or tests before and after training. • Interviews or observations before and after. • Assessments must be closely related to the aims of the learning. • Measurement and analysis is simple on a group scale.	• Relatively simple to set up, but more investment and thought required than reaction evaluation. • Relevant and simple for quantifiable or technical skills. • Less easy for more complex learning such as attitudinal development. • Cost escalates if systems are poorly designed.
BEHAVIOR	**The extent to which participants applied learning and changed their behaviors.** • Did they put their learning into effect back on the job? • Was there noticeable and measurable change in activity and performance? • Was the change in behavior sustained? • Could they transfer their learnings to another person? • Are they aware of their change in behaviors, knowledge or skill?	• Observation and interview over time. • Assessments need to be subtle, ongoing and transferred to suitable analysis tools. • Assessments need to be designed to reduce subjective judgment. • Trainee opinion, which is a relevant indicator, is also subjective and unreliable, and needs to be measured in a consistent way. • 360-degree feedback is useful. • Assessments can be designed around relevant performance scenarios and specific performance indicators or criteria. • Online and electronic assessments are more difficult to incorporate. • Assessments are more successful when integrated within existing management and coaching protocols. • Self-assessment can be useful with carefully designed criteria and measurements.	• Measurement of behavior change is less easy to quantify and interpret than reaction and learning evaluations. • Simple, quick response systems unlikely to be adequate. • Cooperation and skill of observers, typically line-managers, are important factors, and difficult to control. • Management and analysis of ongoing subtle assessments are difficult without a well-designed system. • On-the-job evaluation is vital. • Behavior change evaluation is possible given good support and involvement from line managers or trainees.
RESULTS	**The effect on the business of improved learner performance.** • Measures are typically business or organizational performance indicators (volumes, values, percentages, timescales, return on investment, complaints, staff turnover, attrition, failures, wastage, non-compliance, quality ratings, achievement of standards and accreditations, growth and retention).	• Many of these may already in place—the challenge is to identify which and how to relate those to the trainee's input and influence. • Identify and agree on accountability and relevance with the trainee at the beginning. • Failure to link to training input type and timing will reduce the ease by which results can be attributed to the training. • Annual appraisals and ongoing agreement on key business objectives are integral to measuring business results derived from training.	• Individually, results evaluation is not particularly difficult; across an organization it becomes more challenging because of reliance on line-management and the frequency and scale of changing structures, responsibilities and roles. • External factors affect organizational and business performance, which cloud the true cause of good or poor results.

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Your Meeting Design Formats

In order to enhance the participant experience and increase the return on their time and money, meeting professionals are introducing new meeting formats and delivery methods that provide immediate and long-lasting benefits. These formats and methods vary from open space to mini-lecture. What they all share is a more interactive engagement than the traditional lecture that focuses on the needs of participants.

Meeting Design - How-to Guide

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OPEN SPACE TECHNOLOGY

Open Space Technology (OST) is a design approach with no formal agenda beyond overall purpose or theme. Participants create their agendas—for anything from a simple session to a complete multi-track conference—in a relatively short time using simple guidelines. At the conclusion of the meeting or event, participants debrief.

Open space meetings are characterized by a few basic elements.

• An invitation that explains the purpose of the meeting
• Participant chairs arranged in a circle
• A "bulletin board" of challenges or opportunities posted by participants
• A "marketplace" of breakout spaces where participants "shop" for information or ideas

Typically, an open space meeting begins with short introductions by both the sponsor and the facilitator. The sponsor introduces the purpose and the facilitator explains the open space process. Then, the group creates a working agenda on the bulletin board (or other large surface). Each breakout session "convener" takes responsibility for posting an issue, assigning it a space and time and, later, kicking off the conversation, taking notes and sharing them with all involved.

Harrison Owen, the author of *"Open Space Technology: A User's Guide,"* identifies several principles and one law that describe the open space process.

PRINCIPLES
• Whoever comes are the right people.
• Whenever it starts is the right time.
• Wherever it happens is the right place.
• Whatever happens is the only thing that could have.
• When it's over, it's over.

THE LAW OF TWO FEET
If at any time you find yourself neither learning nor contributing, use your feet to go someplace else. All participants have the right and the responsibility to maximize their learning and contribution.

SOURCES: *Wikipedia.com, Openspaceworld.com*

UNCONFERENCE
An unconference is a participant-driven meeting that uses variations of the Open Space Technology methods (participant-initiated agenda and discussions). This form of conference is particularly useful when participants have a high level of expertise or knowledge in the field. An unconference can be conducted using a number of facilitation styles. For more information on unconferences, see **www.unconference.net**.

SOURCE: *Wikipedia.com*

UNPANEL/FISHBOWL
An unpanel is useful for interactive discussions among many people. Four to five speakers converse at any given time (in the fishbowl) and are surrounded by a much larger group of people. Anyone can join the inner circle when a seat becomes available.

In an open fishbowl, one chair is left empty and any member of the audience can join. When this happens, an existing member of the fishbowl must voluntarily leave and free a chair. In a closed fishbowl, all chairs are and remain filled. To start the fishbowl, a moderator introduces a topic and participants start the discussion. When time runs out, the moderator closes the fishbowl and summarizes the discussion.

SOURCE: *Wikipedia.com*

SPECTOGRAM
A spectogram highlights the range of perspectives in a group. A facilitator asks a question of interest and directs participants to take a stand along an agree-disagree spectrum, which can be imaginary or a strip of tape along the floor. The facilitator then interviews people at different points on the spectrum about the opinions they hold. This process creates a shared experience while demonstrating the range of opinions in a community. It can serve as an anchor for additional conversations.

SOURCE: *Conferencesthatwork.com*

SPEED GEEKING/RAPID DEMOS
Speed geeking allows participants to quickly view several presentations within a fixed period of time. Speakers present a five-minute demonstration for a small audience. After five minutes, the audience moves on to the next demo/presentation area.

This format offers advantages for both sides: presenters refine their pitch through repetition and participants moves from

demo to demo, efficiently using their time while exposing themselves to new concepts. A large room is an ideal venue.

SOURCE: *Unconference.net*

WORLD/KNOWLEDGE CAFÉ
A world café is a conversational forum that allows for in-depth exploration. Tables are set like a small café with approximately four to six seats each. A facilitator puts forth a topic and participants discuss for about 20 minutes. At the end of the allotted time, one participant stays behind and summarizes the conversation to the next group that comes to sit at the table. The other people move on to different tables and another round of conversations commences. At the conclusion of three rounds, the facilitator collects the conversation notes and shares with participants verbally, physically or electronically.

A variation on the world café, a knowledge café begins with participants seated in a circle of chairs (or concentric circles of chairs). A facilitator explains the purpose and then introduces a topic and poses one or two open-ended questions. Participants break into groups to discuss the questions for about 45 minutes. Then, they return to the circle, and the facilitator leads the full group through another 45-minute session during which people reflect on the small group discussions and share thoughts, insights and ideas. A knowledge café is ideal for between 15 and 50 participants. If there are more than 50 participants, it's usually necessary to employ microphones, which can inhibit the flow of the conversation.

SOURCE: *Wikipedia.com*

GRAPHIC RECORDING/FACILITATION
Graphic recording strategically combines words and images to convey information. Practitioners use large sheets of paper or whiteboards to document dialog and group activities using images, symbols and words. Images often convey information more efficiently and effectively to wider and increasingly diverse audiences. Visual language can be a useful tool in helping

people tolerate ambiguity and communicate quickly, often before concepts are ready to be communicated using traditional writing.

SOURCE: Wikipedia.com

MINI-LECTURE
Popularized by the TED Conference, these abbreviated talks focus the messenger and the message. These short presentations are highly scripted, well-rehearsed events supported by compelling PowerPoint slides and orated by professionals. Taking a full-length presentation and reducing it to an effective 15 to 18 minute story requires careful planning and consideration. Some mini-lectures precede brief facilitated discussions, often by the presenters themselves.

SOURCE: Wikipedia.com

PECHA KUCHA/IGNITE
Japanese for "chit chat," this delivery format was developed by a group of designers as a way of sharing their work. During Pecha Kucha presentations, speakers present 20 images/PowerPoints for 20 seconds each for a total presentation time of 6 minutes and 40 seconds. Today, there are more than 550 cities around the world that host Pecha Kucha Nights. The format's popularity lies in its easy accessibility (anyone can do it) and the rapid and often entertaining short-story format. An Ignite session involves 20 images shared for 15 seconds each for a blistering five-minute presentation. As with Pecha Kucha, the challenge is on the presenters to tell a compelling story using the most appropriate images within the time allowed.

SOURCE: *Pecha-kucha.org*

STORYSLAM
Similar to a poetry slam, storySLAM allows participants five minutes to tell a story, usually part of a chosen theme. No notes are allowed and the stories must be told, not read. This is an ideal vehicle for sharing information, because the stories connect speaker to audience on an emotional level.

SOURCE: *Themoth.org*

BUZZ GROUP
Buzz groups are small units that break off from a larger assembly in order to generate ideas for the larger group to discuss or act upon. The use of buzz groups was first associated with J. D. Phillips and is sometimes known as the Phillips 66 technique. Large groups may be divided into buzz groups after an initial presentation in order to cover different aspects of a topic or maximize participation. Each group appoints a spokesperson to report the results of the discussion later.
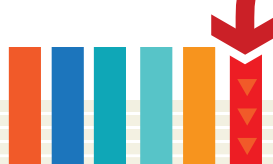
SOURCE: *Kstoolkit.org*

MASHUPS
Like their musical roots imply, mashups are a collection of seemingly random groups that gather to share interests and ideas. A mashup can be organized by anyone at a meeting or event and promoted via a variety of channels from word-of-mouth to social media. A Tweetup is essentially a mashup organized via Twitter. Mashups can be planned or spontaneous. They provide participants with a time and place to get their needs addressed, in the case that formal educational programs or networking opportunities are not helpful or convenient.

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These are just some of the more formal techniques being introduced into meetings and events to increase participation and engagement and ultimately provide a more valuable attendee experience. The International Association of Facilitators (**www.iaf-world.org**) has a free database of more than 550 techniques that can be used to aid group meetings or events (**www.iaf-methods.org/methods**). The techniques are searchable by name, application or group size. A trained facilitator best conducts some of these; however, those with less experience can introduce many.

Besides formal meeting formats, there are also many informal designs that accomplish the same objectives of engaging attendees and enabling them to be more successful.

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