

Enabling Continuously Improving Meetings

Reconnecting Business Meetings to Business Activity

Introduction

With studies suggesting that business professionals now spend 40-50% of their time in meetings you would assume that we are perfecting the art of meeting. However, a closer look at the data says otherwise. It is estimated that half of all meetings are unproductive and 25% of any given meeting is spent on irrelevant issues. This document looks at the problem from a technology perspective and discusses how next generation technologies can assist in materially increasing productivity not only of meetings, but of the corporate dynamic of studying data and coming up with actionable conclusions.

State of the Market – Technology Tail, wags the meeting efficiency Dog

Cut, Paste, Discard

A typical scenario involving recurring meetings (forecast meetings, staff meetings, project review meetings, etc.) is the following: Via cutting and pasting from various business systems, each stakeholder puts together a series of slides that present their agenda, prints handouts, and delivers it at the meeting. In the course of the meeting individual presenters speak to their topic and more often than not the meeting loses focus of the task at hand. Each new presentation introduces the opportunity for a new agenda and thus a new detour. At the end of the

meeting handouts are filed away or tossed out, only to begin the cycle again with the next meeting. There is an inherent disconnect in this approach in that you have one set of data and processes to operate your business and a different set in which to provide status to the team. The latter data format tends to be PowerPoint. The result is that in this process the business activity and the presentation activity are disconnected.

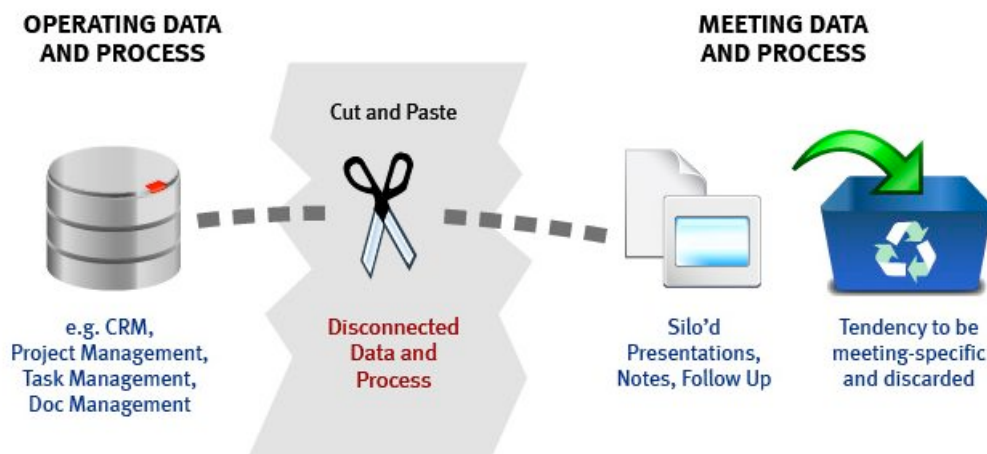
Using the wrong tool fosters inefficiencies

The overwhelming technology for delivering and managing meetings is PowerPoint. PowerPoint however, was built for a different purpose- as a personal productivity product to deliver promotional presentations in “newscaster” mode.

There are three primary shortcomings of PowerPoint in the context of presentations in team meetings :

1. It is not connected to the business data that is being discussed (Cut, Paste, Discard paradigm vs. Connected paradigm).
2. It is not inherently designed to foster collaboration.
3. There is no automated way to capture the meeting experience and to continually improve the document.

On the plus side, PowerPoint provides a uniform way to organize your thoughts and present them with both narrative and visual support. This can be very



powerful from the perspective of formulating and defending individual positions. This is extremely valuable in team meetings as well, and needs to be carried through to next generation products that are purpose built for meeting presentations.

Focus on promotional presentations overshadows Team Purpose

When using a personal productivity product in a team session, you get predictable results- a series of personal presentations each with an individual agenda. While PowerPoint is a powerful tool for creating highly polished presentations this can encourage additional inefficiencies when applied to meeting presentations. These have to do with the massive time spent in meeting preparation on polishing the PowerPoint, which usually offers little in the way of advancing the business activity. In other words with Team presentations, the focus should not be on the presentation, but on the business activity.

Out of Sight, Out of Mind negates collective improvement

The primary inefficiency however is in micro silos of data on individual PCs, creating inaccessible islands of Business expertise, and disconnected business processes that renders the presentation document useless in team business activity. For a presentation

to be useful in a collaborative environment two things are needed:

1. Accessibility to anyone, anywhere
2. Fresh business views of your primary business sources that encourage the team to continually return to the source document as an uninterrupted extension to the meeting. With the current model the meeting presentations are tucked away on a personal computer with no team access – or at best team members file a personal copy of stale data.

Web Technologies pave the way for a new type of presentation tool

The Internet and Web Services enable a new kind of presentation tool that has the important benefit of reconnecting the meeting to the business activity.

Firstly, the Internet offers an inherently collaborative platform that is globally accessible. From the perspective of presentation development this allows easy access to presentations and other documents, and provides a painless way for a team to participate in the ongoing improvement on a set of ideas, Key Performance Indicators, and activities.

Secondly, Web services are enabling the next wave of change, where creating Business views of disparate applications is becoming pervasive and more

Next Generation: Continuously Improving Meetings

OPERATING DATA AND PROCESS



e.g. CRM,
Project Management,
Task Management,
Doc Management

WORKING DOCUMENT AVAILABLE ANYWHERE, ANYTIME



Business Views
of CRM, PM, Docs, etc.
With Integrated
Task Management

DIRECT CONNECTION

importantly is becoming accessible to the business professional. Now business users can rapidly “mash-up” charts, graphs, KPIs etc, of their various information systems with a single methodology.

The corollary in the PC world requires either a lifeless screen shot of a business view, or to dump the entire application into slide. The former breaks the connection, and the latter approach ostensibly does as well as the application and slide need to be resident on the same PC. In other words, in the Desktop metaphor there is no common methodology for adding connected business views to slides for team presentations.

Continuously Improving Meetings with DreamFactory’s Carousel

Drag, Drop, Connect

Carousel is a new type of presentation tool that can change the way meetings are conducted. It embodies the three main elements essential for improving team meetings:

Slides are connected to live data sources via Web Services. Using a unique Drag, Drop and Connect paradigm, business users can quickly create and organize Key Performance indicators and other live business views in to presentation “Notebooks”.

Carousel decks are inherently collaborative and there are no micro-silos of data. They enable team members to create and continually refine connected slides surrounding their core competence as part of a broader deck. Slides are globally accessible for every team member, which not only has the benefit of fostering collaboration, but of equal importance it provides a working document that stakeholders continually refer to inside and outside of the meeting experience.

Action items, notes, and other important information gained from the meeting experience are captured and managed within the Carousel Deck. Combined with live views of key business drivers and presentation elements, Carousel is “ground control” to advance business activities to results.

With Carousel the “Deck” is a working document that improves with each meeting iteration. This offers the dual benefit of a surgical team focus on the business task while shortening the meeting time (by refining

out unproductive sidebars). Moreover, it entirely eliminates the need for PowerPoint preparation in advance of each recurring meeting.

One of the main benefits of Carousel having a single, highly accessible working document is that you create the dynamic of a constant spotlight on the business process. Similar to ever present “Stack Rankings”, by continually shining a spotlight on the activity stakeholders can keep their pressing projects on center stage.

By having live business views at your fingertips, anytime, anywhere, Carousel reconnects the meeting to the business task. Simply put, with Carousel a meeting presentation is seamlessly integrated with the overall business process breaking the cycle of single use “throw away” presentations.