Technology Association of Oregon Improves Effectiveness of Annual Planning Meeting with Quilla™

Summary
Technology Association of Oregon (TAO) is a non-profit dedicated to supporting innovation by connecting local entrepreneurs in the tech industry. Every year, TAO employees from different parts of the state hold an offsite retreat to create an annual plan for their organization. This year, the team used Quilla™, a large-scale digital eWriter, to build their plan and explore new ideas. By introducing this modern ideation tool into their planning process, TAO improved meeting efficiency and even strengthened team bonds.

Challenge—More Structure Needed to Drive Team Productivity
TAO has a distributed staff of nine employees who operate nimbly and informally most of the time. When it’s time to gather together for an offsite planning retreat, more preparation and structure are needed to be most productive and creative during their limited time together.

Their specific challenges include displaying and collaborating on a draft annual plan, adhering to a formal agenda while also encouraging an open dialog of ideas, and having the right tools for annotating and refining their plan despite meeting in a rented space.

During these planning retreats, TAO has typically used wall-hung whiteboards and markers, presentation screens, mobile phone cameras, live Google docs, and email to distribute content after the meeting. The approach was fragmented, calling for time spent after the meeting to ensure participants had all the latest information and outcomes.

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Solution—A Tool for Open Brainstorming and Formal Meeting Moderation

At their latest retreat, TAO used the light-weight, portable Quilla to collaboratively work on their plan in real-time and for meeting management. Said Theresa Jelderks, Chief of Staff + VP, Programs, “We arrived in our co-working space with Quilla, and in 10 minutes we were ready to rock ‘n roll. Quilla is super easy and intuitive. It doesn’t take a Ph.D. to use it.”

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Before the meeting, Jelderks had pre-loaded content on Quilla, including an agenda, forty slides from a recent Board of Directors meeting, and a draft operating plan for the year. During the meeting, the team moved about the content often using Quilla touch controls to checkpoint progress against the agenda and write notes on the plan as they reviewed it. They also opened blank pages to jot down ideas and action items as they came up. The ease of instantly locating content and writing with a pen enabled the team to focus on strategic discussion, not on troubleshooting technology.

Quilla automatically saves all content, so there was no need to take photos or transcribe notes. “We left the retreat with the Quilla device, a USB of digitized content, and a better annual plan than when we started,” said Jelderks. The co-working space utilized by the TAO team had classic whiteboards on the wall, but Quilla fit their needs completely.

On the softer side, Quilla facilitated an ad-hoc team building exercise. “Quilla captured a very authentic, of-the-moment list to look back on for deeper processing. It really brought the team together to gain a greater understanding of our organization,” said Jelderks.

Results and Future Plans—Productive Planning, Efficient Large-Team Meetings

Quilla brought a new level of formality and structure to planning retreats at TAO, resulting in improved meeting efficiency. Content import and easy real-time navigation effectively set the stage for the meeting and streamlined discussion. Also, the simplicity of Quilla enabled high engagement and contribution by all. A single file of auto-saved content facilitated meeting follow-up, saving administrative time. “It sure beats piecing sequences of documents, photos, and email together to get the full story,” says Jelderks.

TAO sees value in using Quilla to run their meetings in the future – those that require an agenda, professional presentation, collaborative mark-up, and flexible content management.

Key Quilla Capabilities for TAO

—Writes easily with a digital pen, any meeting participant can use
—Works in sunlight-filled offices, no need to close window blinds
—Light and portable—bring to a rented or temporary workspace
—Easy content navigation to bring structure to meetings—revisit agenda, notes, ideas
—USB-saved content—quick and easy to leave with all output in one place

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