

# 7 RULES FOR DESIGNING MORE INNOVATIVE CONFERENCES

Bridge the crucial gap between the inspiration  
of a conference and action back at work

**Ed Bernacki**  
The Idea Factory

Your guide to  
**DESIGNING**  
more  
**EFFECTIVE**  
and innovative  
**CONFERENCES**





**why** do people  
go to conferences,  
take notes  
and **never**  
**look** at them  
**again?**

About two out of every three people who attend conferences say they don't look at their notes again.

**What if we could change this?**

# most people go to conferences, take notes and never look at them again

I watch people at conferences to see how they participate.

- Many admit they put their conference binder on a bookshelf and leave it there.
- Many collect business cards from people they can't remember afterwards.
- Many blame a dull speaker for the fact that they did not listen. (However, criticizing a speaker for being dull is only appropriate if he or she is supposed to be motivational.)
- Many say that a successful conference allows them to go home with one good idea. (Yet, why just one idea?)

This book was written to help people designing conferences.

I had two objectives in mind:

- ① To provide insights, strategies and case studies to shape more innovative conferences that engage people, and
- ② To provide ideas for making conference participants more effective “participants.”

If we pursue both strategies, then conferences will remain useful and productive to the bottom line of participants and those who pay the bills.

**ED BERNACKI**  
**THE IDEA FACTORY**

# VIII

SEVEN RULES FOR DESIGNING  
MORE INNOVATIVE CONFERENCES

bridge the gap between the inspiration  
of a conference and action back at work

## *Rule 1*

The experts at your conference are in the audience, not on the stage.

## *Rule 2*

Think Return on Investment...even though it is hard to measure.

## *Rule 3*

Design your conference with Logistics and Learning.

## *Rule 4*

Learning objectives drive the design of your content.

## *Rule 5*

Always use the brainpower of an audience to create something.

## *Rule 6*

Put structure into your networking and mingling opportunities.

## *Rule 7*

Assume that your conference participants have weak skills for participating in a conference.

**Ed Bernacki**  
**The Idea Factory**

[www.innovativeconferences.com](http://www.innovativeconferences.com)

## **Seven rules for designing more innovative conferences**

Bridge the gap between the inspiration of a conference and action back at work.

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# why do you need 7 rules for designing more innovative conferences?

The great speakers may motivate your audience, but what will people remember a month after the event? Face it. Most people freely admit that they attend conferences, take notes and never look at them again.

I'm not a conference planner but I've spoken at many conferences. I bring an innovator's perspective to the meetings industry. I also co-created the Conference Navigator Guide that thousands of people truly say is a "great idea" for the conference industry.

This is a simple book to read. The rules are designed to prompt some new thinking in the design of conferences. You may not agree with all of my ideas, insights and observations.

This book started as an article for *Meeting NewZ* magazine in New Zealand. I want to thank Stu Freeman who commissioned that article for seeing value in my ideas.

You may have two reactions when you finish reading this:

- You find it inspiring as it prompts new ways of thinking. If you create some new ideas that you want to share, email me with a brief summary and I will include it as a case study in revised versions of this book.
- You find it lacking and uninspiring. If so, tell me why and I will refund your money.

Regardless, I hope it makes you think differently the next time you start to design a conference.

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Ed Bernacki created the Idea Factory to help people and organizations develop their capacity to innovate. He has developed a range of unique tools and workshops that focus on skills for innovative thinking, recognizing the importance of using the diversity of problem solving styles in our organizations, and shaping a climate open to new ideas.







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# bridging the gap

## linking conference results to the workplace

Your conference is over. Participants seem happy. They smile and look around to say their goodbyes. They keep an eye on their watches to make connections to get home. A week after the conference, the CEO is looking over the invoices for the events and wants to know if the event delivered value. She asks a research team to contact participants to ask four questions about the conference.

- ① Have you looked at your notes from the conference?
- ② Did you find some great ideas and act on them yet?
- ③ How did this conference make a difference to the success of our organization?
- ④ If you did not attend this conference what would you have missed?

How would your participants answer these questions? They are not the regular questions people are asked after a conference.

Your CEO really wants to know if the ideas will bridge the gap between the fun and excitement of the conference and the day-to-day reality of the workplace. By bridging the gap they recognize that the conference is a chance to relax, learn, gain new insights, and gain new ideas for the future.

However, this potential for growth will not happen if people do not bridge the gap between the event and the workplace.

When I ask an audience, “Do you take notes at a conference and never look at them again?” the majority of people say, “Yes.” The results are the same for association, corporate and public sector events. The results are the same for Canada and the United States, as they are for New Zealand and Australia. Is it possible to turn this around? Absolutely! But it requires that we take a different view of *what is possible* at a conference.

The conference or meeting may have been fun, entertaining and informative. It may have rated highly based on conference surveys. But was it a success? Was the investment of time and money effective? It depends on how you define these words.

There are many factors nurturing the need for greater conference effectiveness. Corporate budgets are getting tighter with a growing number of executives questioning the actual value of conferences in terms of generating a satisfactory return on investment (however we may define this). More importantly, executives are now asking, “How does this conference add to the bottom line of my organization?” Accountability is critical. Conference organizers and designers

must adapt to the new reality that their efforts and even their jobs could be impacted if executives choose to invest in technology rather than in-person events that saves all of the costs involved with travel, hotels, and meals.

In 2003, Meeting Professionals International (MPI) looked at the issue of return on investment (ROI). While it is primarily a concern of the corporate sector, associations are starting to include this type of bottom line review as well. MPI found a clear link with a successful ROI and greater budget allocation. This is a great sign for the industry:

“Companies experiencing successful ROI have a surprisingly optimistic outlook for increased budget allocations. Among all companies surveyed, 33% expect budget allocation increases for event marketing; however, when a successful ROI was experienced for past events, 51% expect increases in budget allocations.”

Clearly from the research, even a successful bottom line is not a guarantee of increased budgets. From an association perspective, it *found* something a little different:

“Associations have reported a higher concern with past performance and event attendance as success criteria than do companies, who are more likely to focus on ROI. Thus associations are more likely to continue to emphasize event marketing as long as members attend events, the process is well executed, and the objectives of member education, satisfaction, involvement, and networking are met. ROI, although important will be secondary to associations, and indicates no material affect on budget allocation.”

(MPI Research 2003 – Association Event Marketing: A benchmark research report reflecting current event marketing among United States Associations).

One of the problems noted in the research is the difficulty of actually measuring the “return” from an investment in conferences. It is a very complex issue.

## Real conferences are important

On the other hand, there is a tremendous need for overly stressed people to sit back, reflect on their jobs, their organization and their future. They need time to create new visions for the opportunities and challenges that they need to tackle to be successful. Conferences are the ideal place to find new ideas, nurture teamwork, and gain commitment to move forward on personal and organization goals. But the old model of conference design leaves far too many opportunities undeveloped.

To prove the point, when asked to speak at an event I ask about the learning objectives for the conference. Oftentimes, the response is, “Our theme is...” Many events do not have a learning strategy or learning objectives. A group of speakers are cobbled together around a topic with little insight into to the objectives of the organization or the event. When I tried to raise some of the ideas in this guide, I was often given some excuse why it is impossible to do anything innovative. On a few occasions the organizers saw value by trying a new way to deliver content. Many of these are case studies in this book.

## What is an effective conference?

Let’s start by defining this question – *what is an effective conference?* Based on interviews and observation of the meetings industry, definitions vary from “people showing up for the conference” to “our business launches a new product range from an idea created at the conference.” Why the difference? This reflects the objectives and the design of the actual conference. For the purpose of this guide, a definition of conference effectiveness is used to challenge the industry to reconsider many of its basic assumptions. This definition is:

{ definition }

**For a conference to be effective, people must find new ideas at the event and then put them into action after the event.**

Therefore, if people do not act on their ideas after the conference, it was not effective. Regardless of how people may have liked the event, its success is limited.

Those working in the industry and profiting from it are the guardians of millions of dollars of association, not-for-profit and corporate funds that are invested to make people and their organizations more successful. There would be few executives, if any, who would say that the most important aspect of a conference is that their staff like the speakers, venue or food. Yet this is what we often measure.

Meeting Professionals International Foundation has studied the effectiveness of meetings from three perspectives:

- Participants who attend the event
- Conference organizers who organize the event
- Managers who pay for the event

Needless to say, they found that different groups find different things to be important. The article also highlights a significant issue for the industry.

“Scientifically rigorous data about what happens in a corporate meeting room is rare. Too often we rely on our impressions, whether as planners, as attendees or as senior managers. Even our evaluation tools – usually on-the-spot surveys or post-meeting wrap-up sessions with the planning team – seem woefully inadequate at times.”

The study examined sales conferences, management meetings, and education training meetings. To qualify for the study, meetings had to involve significant planning, spending and be

attended by 20 or more people. Here are some highlights.

- Attendees judge the success of meetings somewhat differently from senior managers.
- Attendees place greater emphasis on what transpires within the meeting in contrast to senior managers who are more concerned about the outcomes of meetings.

Below is a comparison of the top success factors as seen by senior managers and attendees.

### **Key meeting success factors of senior managers**

- ① Clear sense of organizational priorities
- ② Concrete action plans
- ③ Improved interaction
- ④ Important messages are remembered
- ⑤ Greater productivity from learning
- ⑥ Improved motivation and inspiration
- ⑦ Greater commitment to the organization

It is very clear that managers who pay for the event are looking for a bottom line return to the organization.

### **Key meeting success factors of participants**

- ① Well prepared speakers
- ② Agenda covered as promised
- ③ Equipment worked
- ④ Stayed on schedule
- ⑤ Sufficient materials
- ⑥ Attendees from appropriate departments came
- ⑦ Speakers held their attention

Participants see it quite differently than managers. They want a “show” by professional presenters who deliver what is promised.

While meeting planners were found to agree with participants on what makes meetings successful, they differ in their perceptions, however, of whether meetings leave attendees inspired and motivated. Meetings professionals overwhelmingly think meetings accomplish this while participants disagree. The report concludes, “This is not surprising as meetings professionals are generally not concerned with how participants perform after the meeting.”

{ quote }

**The MPI report concludes, “This is not surprising as meetings professionals are generally not concerned with how participants perform after the meeting.”**

Based on this study, these recommendations will make meetings more effective:

- ① Meetings should be planned around clearly identified problems or issues with specific, desired outcomes. These outcomes should dictate the form and process of meetings.
- ② Meetings should be viewed as learning experiences designed to change the behavior of attendees.
- ③ The agenda, pace of the meeting, amount of content, delivery methods, and degree of relevance are critical factors that must be carefully planned.
- ④ Meeting planners can play an instrumental role in addressing areas that need to be improved by:
  - increasing their knowledge of how to institute change within an organization and the proper role of education;
  - expanding their role beyond meeting logistics to include desired outcomes, selection of content and the use of appropriate methodologies and speakers; and

- by coaching others who have significant roles in the learning process of meetings.

## What is an innovative conference?

This is very tricky question. Everyone wants to think of their events as being original and innovative, but what does this truly mean? I once spoke at a conference that used laser lights to bounce my name throughout the room. It was entertaining but not innovative.

For an event to be innovative, something has to happen or be created that the participants are not expecting. And it must be important in a meaningful way.

This is a challenge as people have so many different expectations of a conference. For an effective conference to be called “innovative” by the participants who attend, it will likely have these characteristics:

- It will be designed to address issues that have *meaning* and are truly important to the participants.
- The conference will engage people *emotionally* and *intellectually*.
- The results of the conference will *create* something of value.
- It will transcend a traditional meeting outcome to make the participant feel like they have *experienced* something special.

meaning  
engage  
create  
experience

*These words describe the essence of an innovative conference.*

# Purpose of this guide

Designing conferences is a challenging exercise. It must combine a working knowledge of special events, sponsorships, organizational development, learning theory and project management. This book focuses on the underdeveloped aspect of our event plans: the learning strategies of our conferences. It may be the responsibility of human resources, learning and development or organizational development specialists to focus much harder on this challenge:

*How can we shape our conferences to be more effective in order to increase the return on investment from our conferences?*

This guide will provide background perspectives on taking a more sophisticated planning approach to designing conferences and then offer a scrapbook of ideas to prompt your thinking when designing your next event. It begins with the idea that every conference needs two types of plans, planning processes and perhaps planning groups:

- ① **The Logistics plan** summarizes a thousand planning, management and administrative details to bring people and speakers together at a venue.
- ② **The Learning plan** defines clear objectives for learning, networking, collaboration and the design of the event to achieve these results.

This book will help you design a learning plan to shape the overall event. This is the best way to make events productive and valuable to your participants. This book does not help you organize a conference. There are many “how to organize a conference” books on the market.

n o t e s

ideas to save  
quotes to remember



questions to ask  
actions to take



# WVII

## SEVEN RULES FOR DESIGNING MORE INNOVATIVE CONFERENCES

### why seven rules for more innovative conferences?

The word ‘rule’ was used as rules suggest a discipline or structure. Disciplines are something most people hate but need to get new results.

- Fitness is a discipline.
- Saving money is a discipline.
- Creativity is a discipline.
- Conference design is a discipline.

This guide provides a roadmap to prompt and provoke new thinking in the design of your event. It may be long overdue. After all, how long will we accept that most people attend conferences, make notes and never look at them again?

You will find these types of information in this guide:

- ① New ideas to help you view the design of conferences differently.
- ② Tips and case studies that provide real life ideas highlighting a specific approach or example.
- ③ Planning sheets that give you a valuable template for designing a learning plan.

Here is an overview of the seven rules.

#### **Rule 1: The experts at your conference are in the audience, not on the stage.**

As a speaker, it’s clear that many event organizers assume that people go to a conference to see experts and motivators. That’s what the design of most events tells me.

We often bring outsiders into an association or corporate conference and ignore the voices of those who actually do the job. This often results in generic presentations that often miss what the audience really needs to hear. There is value in the outside view, as long as it does not come at the expense of the expertise and insight in the audience. Don’t ignore the expertise, insight and experience in the audience.

#### **Rule 2: Think *Return on Investment*...even though it is hard to measure.**

The concept of measuring a return on investment or return on the objectives is growing in the training industry and no doubt will grow in the conference industry. How you measure the return on the dollars invested in a conference is challenging. There are two measures you need to consider.

- ① For the host organization – Someone is paying the bills. What is important to them? Generally it involves some form of change in the behaviors of participants.
- ② For the participants – The individuals invest their time (and sometimes money) to attend.

The bottom line for both differs but is equally important. Meeting **Professionals International** said the conference industry has been slow to focus on measuring a return on the millions of dollars that are invested in these events. Here are some considerations for building a stronger focus on creating value at your events.

### **Rule 3: Design your conference with Logistics and Learning.**

When I get called to speak at a conference I often ask, “What are the learning objectives for this conference?” The answer is most often: “Our theme for this event is...”

A theme is not a learning objective. The solution for designing more effective conferences starts by recognizing that all events have two different planning priorities which may require two planning groups or committees. Each event requires:

- ① A logistics strategy that includes the planning details to host the event. This is the traditional role of the meeting planner.
- ② A learning strategy that defines why this event is being held, what results are crucial for participants, and how they will be achieved. In some public sector and large corporate events, people with a background in learning develop these strategies.

To define these takes a different style of thinking. People who plan logistics must be detailed, analytical problem solvers while learning specialists must have foresight to ask, “What’s possible here?” They must look at ideas that have

not been tried before. When great logistical plans are combined with great learning plans, something powerful happens.

### **Rule 4: Learning objectives drive the design of your content.**

The learning strategy should fully exploit the learning potential of your resources. However too many events leave this to chance. For example, many events use a ‘call for speakers’ to source their content. This limits your objectives to whatever speakers want to present – not what your audience needs to hear.

Start by asking some questions that lead to the design of the content for the event:

- ① How do you want to involve people in the event?
- ② What do you want people to achieve or create at the event?
- ③ How can the conference be used to provide the insights, contacts or opportunities that add directly to the bottom line of the participants?

Each of these questions has a planning template to help you develop content design.

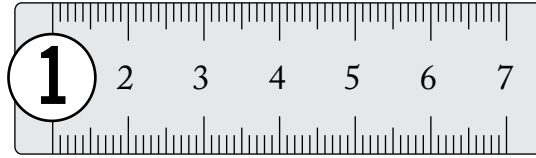
### **Rule 5: Always use the brainpower of an audience to create something.**

It is a rare conference that actually uses the expertise to create new knowledge. What if you change one keynote presentation into a participative brainstorming event that involves people in a meaningful way? For example, change one session into a 30-minute ‘greatest challenge’ idea factory. Take five minutes to put a context around one question: What is the biggest challenge you will face next year? Give people time to discuss the issues they face and then invest 10 minutes to contribute their ideas. This has been used by some events to generate hundreds of ideas which associations turn into articles for





# RULE



## the experts at your conference are in the audience, not on the stage

As an observer of many conferences, it's clear that many event planners use a similar formula for designing events. We bring outsiders into an association or corporate conference to add their perspective, expertise, experience or celebrity.

- Some speakers are inspirational who offer stories of overcoming adversity or challenge.
- Some speakers are motivational who offer a strategy for success.
- Some speakers are leading edge who offer insights, facts, research or knowledge.
- Some speakers are entertaining who offer stories, playfulness or humor.

Many professional speakers are experts in packaging a message and presenting it. This includes people who talk about leadership and lead no one or talk about teamwork yet they are not on a team. This is often the nature of professional knowledge. All professional speakers talk about customizing a message for each audience to address the specific issues relevant to it. But I believe that there is another level of expertise that should be nurtured and harvested more often: authentic experience of the conference participants. I have often questioned why outsiders are considered so necessary for every presentation, often at the expense of the experts inside the conference venue.

The true experts at the conference are those who 'do' whatever your conference is about, not those who talk about 'doing.' Nowhere did I see this demonstrated better than at a conference for the Family Business Association in Australia. Each participant came from a business that involved the entire family, often more than one generation. I had the chance to meet people who are the second and third generation owners of their businesses. These people have run successful and profitable businesses for many years, yet I was supposed to enlighten them on innovative thinking. I concluded that I had useful ideas but a more valuable experience for participants would have been a range of case studies from their own businesses using my expertise to provide the context, theory or research to show that their anecdotes were well grounded.

As such, the most powerful sessions were those that had members talking about managing a business within the context of making family decisions, such as:

- Which son would take over the business, and
- Why one child was excluded from the business.

These are tough issues and outsiders may have empathy, but to comment without personal experience brings little insight. The same would be true for the majority of association and public sector conferences.

This does not mean that every session should be turned over to the members.

Rather, be more deliberate with involving the expertise of the people who ‘do’ whatever the conference is about. This may involve more work in sourcing speakers, planning sessions and working with the speaker’s content, but the product will be stronger and it will connect with the audience. There is value in the outside view, as long as it does come at the expense of the expertise and insight in the audience.

{ quote }

**There is value in the outside view, as long as it does come at the expense of the expertise and insight in the audience.**

This understanding should lead you to a couple of challenges:

- ① How can you get the audience involved knowing that they are not professional speakers?
- ② How do you capture the expertise or insights that your audience would truly appreciate?

Many of the ideas presented in this book can help to answer these questions. For example, one of the easiest ways to find the truly important issues of an association or a business is to ask the audience a question such as:

- For association members: what are the biggest challenges you will face next year?
- For a business: what are one or two things that we could do make our business more successful next year? What are one or two things that would make our company a better place to work?

## CASE STUDY 1A

### staff as a source of insight

I asked this question to 110 employees at a New Zealand company event and generated 160 ideas. I then worked with these ideas (after the event) to summarize them into 50 individual recommendations. These fell into five categories ranging from ‘company communications’ to ‘fixing up the office.’ The CEO looked at the results and saw the immediate bottom line value of using these staff ideas. He also learned that most staff felt they did not understand the direction of the company. The CEO thought this was obvious but saw the communication gap between his office and staff. He realized that the conference failed to achieve this result and needed to be altered for the next event. This insight gave a whole new meaning of success to this event because the company solved a major problem.

An association recently found a wealth of ideas after they gave members about 15 minutes to provide written answers to this issue: *What are the biggest challenges you will face next year?* It reviewed the many responses and used these “challenges” as ideas for magazine articles, training workshops and to design the next conference. The format for involving the audience needs some creativity. It may include approaches like:

- Have someone interviewed on stage as an expert (as long as whoever does the interviewing has thoroughly researched the topics to get at the important issues). This way they do not feel the pressure of creating a full presentation.

- Be a member of a panel that is moderated by an MC. You could have several members on the stage who represent a different perspective. Again, the MC must be prepared with quality and insightful questions (see Case Study 5K).
- Present a ‘mini’ key note on a specific theme for 15 minutes. For many people the task of creating a full key note is daunting. This short version is easier and it forces speakers to reflect on the key points. Often a short speech is harder to write than a long one! This could be combined with several people who each present for 10 to 15 minutes.

It may be necessary to provide some coaching and support to help members create their presentations. Many speakers would likely welcome the opportunity to shape more powerful presentations using your members as “case studies.” They could interview the member prior to the event to define the key points to present and then help to shape a 5 or 10 minute session.

Particularly in the case of family business members, it was interesting to hear of the decisions made for some important aspect of their business. But equally important is to hear of the options that were not used and why. It is likely that others would face the exact same decision.

The best conferences, like the best speakers, combine some wisdom, humor and insights. All of these components are important.

The best way to bridge the gap between a highly inspiring conference and results back at work, is to start the process at your event. There are a number of general strategies you can use to get more involvement with your audience. The tactics you use should reflect the learning strategy for the event (more on this later). For now, consider these opportunities for getting more involvement.

## Prior to the conference

Consider that you are building a relationship with your participants as soon as they register for the event. Generally they will get a confirmation and some background on the event.

Use this opportunity to mail or e-mail people a conference briefing that outlines some of the overall challenges to consider prior to the event. As such, when people register, send a letter or package (that can be branded with your logo or shaped into a newsletter) that includes:

- Brief articles from your keynote speakers
- Some important challenges to consider prior to the event, and
- Something directed toward ensuring participants come to your event ready to “participate.”

This also builds enthusiasm and anticipation for your conference. You not only want participants to show up, you want them to start thinking about important issues in order to get the best possible results. Keep in mind that people often show up at a conference with very few expectations for the event. Why? The simple reason is that they invest very little time to consider why they are going to the event. Build your pre-event communication to promote people to set some personal objectives for your conference.

## During the conference

Provide some coaching on being *effective conference participants* to give people new ideas on taking notes, networking, and so on. Remind people to set some personal and business challenges at the start of the event. Lastly, build time into the agenda for people to summarize the event for themselves in terms of:

- Reflecting on the most useful insights and ideas from the conference,

- Selecting the best ideas that they want to work on, and
- Creating a personal action plan.

Often, events end on a strong note with a motivational speaker. They rarely end with the one thing that people say stops them from being more innovative in their work: time to reflect and think. Once people leave an event, much of the content will be lost very quickly. If you build in 10 minutes toward the end of the event to review the event and then get participants to write down the ideas, insights and actions that were important to them, there is a far greater chance that they will act on them.

## After the conference

You can continue the relationship with people after the event in many ways. It can be as simple as sending out a follow-up letter, package or e-mail newsletter to participants that summarize a presentation or prompt people to remember the interesting ideas that arose during the event. Many events now offer the full range of speaker PowerPoint presentations on their websites. However, presentations may not offer much insight without the editorial to go with them.

The value of Rule One is to build stronger relationships with your participants beyond the one or two day event. People attend conferences for many reasons. The most cited reason is to advance their understanding of whatever the conference is designed to achieve. This contributes to their success. Meeting new people and reconnecting with others is important as well.

You not only enhance the value of your current conference, you also help to pre-sell the next conference by recognizing the expertise in the room and using it effectively. After all, that's your bottom line: pre-selling your next event.

The most dedicated audience must surely be the Canadian Association of Professional Speakers. At the conclusion of a recent annual conference, participants were asked to commit

themselves to attend the following year's conference. About 64 percent of participants decided to provide a \$100 deposit as a pre-payment for the following year.

The same applies to corporate conferences. You need to sell the value of your events to whomever holds the budget. If you create more buzz from the conference in terms of positive recommendations about the conference and have tangible evidence of the results that it generated, the greater your opportunity to keep or grow the conference budget for the following year.

The best events prompt people to think about the themes of the event prior to the conference, provide people the tools to get the most value during the event, and prompt people to act on their ideas after the event.

## CASE STUDY 1B

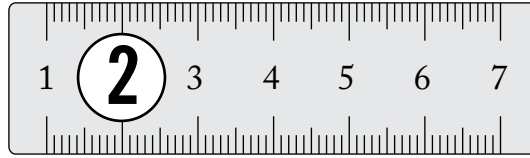
### Better by Design, New Zealand

Tom Peters opened this New Zealand design conference with his usual brand of high energy pull-out-all-stops presentations. However, if you have ever tried to figure out his presentation based on his PowerPoint presentations (which he freely allows people to download) it is most challenging. He uses many slides with only a few words on each. This conference took post conference presentation to a new level by producing a written report that summarized each element of the conference and then offered the presentations for downloading. This allowed participants to get a powerful summary of the event. It also allowed non-participants to get a much more in-depth perspective of the presentation, a great way to sell the next conference.

[www.betterbydesign.org.nz](http://www.betterbydesign.org.nz)



# RULE



## think return on investment: even though it is hard to measure

While the concept of measuring the “return on investment” of a conference is a hot topic, the reality of finding a tool or model that is capable of doing so is very complex. Pioneering work is taking place based on related work in the training industry by people like Jack Phillips and Donald Kickpatrick.

While this work provides a useful base, it should not hinder the creation of a model(s) that helps to judge the value of one speaker over another or one conference over another. This work will evolve. It is not the purpose of this guide to propose a model; rather it’s to highlight the issues of defining the value of a conference. Since we do not have a sophisticated way to measure the value of a presentation or a conference, there are some assumptions that you can count on to help improve the bottom line of your conference. These lead to concrete actions that will make your events more effective.

- ① When a conference is developed or commissioned with clear and concise learning objectives to define what it is to achieve, there is a much greater probability that it will actually impact the bottom line of the person, association or company.
- ② The value will be enhanced if participants actively participate and take responsibility for the results they achieve.

*The challenge to the conference industry:*

**“I cannot help but observe that most conference participants admit that they attend conferences, make notes and never look at them again. If people are not looking at their notes, the odds are good that the value of the event and its speakers will not last long.”**

**ED BERNACKI**

- ③ The greater the involvement of the audience, the greater the value it will create.
- ④ This involvement should prompt participants to ‘bridge the gap’ between the excitement and motivation of the event and the use of the ideas, skills and motivation at work.
- ⑤ The most effective conferences will prompt people to act on their ideas after the event in ways that lead to the bottom line. These will have the greatest return on investment.

The notion of ‘bridging the gap’ needs more explanation. In a reference letter to the Idea Factory, George Gendron, then the editor-in-chief of *Inc. Magazine* said:

In the past 10 years we’ve moved from a period where there were simply too few new original ideas about managing and leading our organizations, to where there are too many. As we’ve said in *Inc. Magazine* many times before, this is the

age of execution. From this perspective, the Conference Navigator is an idea whose time, has come, helping people bridge the crucial gap between inspiration and execution.”

Ignore the reference to the Conference Navigators until the end of this guide and focus on the essence of these insightful comments.

- **Too Many New Ideas.** There are thousands of books and speakers offering ideas on motivation, leadership, innovation, managing people, and so on. Most conferences will present an avalanche of ideas that are laced with jargon, analogies, and metaphors. Yet most conferences do not provide the resource that research suggests people need most: time to reflect on ideas in order to make personal decisions on a way forward.
- **Age of Execution.** Great ideas that are left on a page eventually run out of steam, disappear or die. We can't possibly act on every great idea we hear at the same time but we need a way to manage the most important ideas to get results.
- **Bridging the Crucial Gap.** The gap is the mental space between the excitement and passion of a conference and the reality of the workplace. Many conferences are legendary for great motivational speakers who will make people walk on burning coals (both figuratively and literally) but what happens on the day these people get back to work? The pressures of the workplace quickly catch up with them.

The design of a conference can help to turn great ideas into results. Although measuring the bottom line of a conference is a major challenge, everything we can do to prompt people to act on their ideas is a step in the right direction.

## Let's review the stakeholders of a conference

When planning a conference, keep in the mind the people who have a stake in the success of every event. What one thinks is important may seem

trivial to another. As such, let's review what each stakeholder is looking for...

- ① **Participants** have a common interest to attend the conference and they want to leave with the perception of value. This can be defined in many ways but the reality is that it is very complicated to truly assess the motivation of participants. Keep in mind the following classification of workshop participants that circulates the internet:
  - **Learners** love workshops and conferences, and they are always looking for new things to take away and use.
  - **Vacationers** believe, 'Any day away from the office is a good day.'
  - **Prisoners** say, 'My boss made me attend.'

People will have many reasons for attending a conference. The more you understand why people will attend your event, the greater the opportunity to engage your creativity to satisfy these needs.

- ② **Sponsors** want to influence participants to buy more of their product or service.
- ③ **Speakers** want to impress people with their message, get paid and perhaps sell some books.
- ④ **Venues** want people to enjoy the food and location in order to get people to come back.
- ⑤ **Associations** want to enhance the relationship with its members who attend the conference and keep them as paying members. For corporate events conferences add value to the benefit of working for the organization.
- ⑥ **Meeting planners** want everything to run smoothly. Depending upon the structure they also want everything to keep to the budget to maximize their profit from the event.

It is clear that each has a different perspective of what an effective conference actually means. But who is the most important stakeholder?

I suggest it is the person who agrees to the overall conference budget to pay speakers, meeting planners, hotels, meals, and the many other investments to make the conference a success. In some cases, this is the individual participant who pays for the event. In other cases, it is the CEO or association director.

Here are a few additional concerns specific to the two key stakeholders:

## The participant and their individual ROI

For an individual who pays to attend a conference, their concern is:

- Did the event justify the cost of the event?
- Did the event justify my time to participate in the event?
- Did the event create the circumstances for 'me' to gain new perspectives that will profit 'me' personally or professionally?

This is of particular concern for associations as they want to add value to the relationship with members. I can't image many people developing a personal model to measure their own financial return but they will do so intuitively. They will have a personal opinion of the value they gained from the event and they will likely share their opinion.

## The association or corporate ROI

For the corporate sector, ROI will involve an evaluation of the total conference investment. This must include both hard costs such as the costs of running the event such as speakers, special learning events (business simulations, workshops, etc.), venues, meals, meeting planners, transportation, etc. It must also include the soft costs such as those of staff who are missing days at work. For an event of 100 people who have an

average salary of \$50,000, the staff costs alone are \$40,000 for a two-day event. This should also include the opportunity cost of these people not doing what they are paid to do. Perhaps these calculations are too complicated for most events but those designing conferences must at least consider the investment in their planning:

- Calculating the cost is relatively straightforward: summarize all expenses for an event. There are many conference planning guides and books to help you to assess these costs.
- Evaluating the benefits is much harder. The conference industry has essentially ignored this challenge for the most part. There is a general view internationally that conferences and meetings do not work well, yet so little creativity is being invested in making these events more effective. Groups like Meeting Planners International are now looking at models to do this in a systematic way.

The traditional models for measuring training effectiveness offer some insights. The models look at measurement as a series of stages, going from measuring what is easy and obvious to measuring what is very complex. Consider these stages as defined by the work of The Phillips Group on ROI in the training industry:

- ① Reaction: measure the participant's reaction and satisfaction with the program. Many events already do this in the form of conference feedback sheets. However few events actually measure individual workshops and presentations.
- ② Learning: measure changes in knowledge, skills and attitudes.
- ③ Application and implementation: measure the changes in 'on the job behaviors' and progress with action plans.
- ④ Business impact: measure the financial impact on the business.

With these as a base, it is possible to measure the business impact of the training in relationship to the cost of providing it. This provides a measure of the return on the training investment. This is the information that the corporation or association wants to know: was the investment in time and dollars worth the effort? It may be possible to adapt this model to the conference industry but it is problematic.

The question that will become clear in time is this: who is responsible for developing a practical model for measuring the return on the investment from a conference?

I don't believe it will be possible for the meetings industry to do so alone. Meeting planners do not have the strategic insight into the corporate or association challenges that a conference should be designed to achieve. Ultimately it will be the responsibility of the associations and the many companies that commission conferences to define a model that reflects the results that need to be achieved to justify the investment. Every conference is just one form of communication that can influence staff and members.

## Company objectives may include:

- Improving staff communication, satisfaction and retention.
- Enticing more staff involvement in various programs (ranging from employee suggestions and fitness to coaching and safety).
- Creating a greater working understanding of the vision and values of the organization.
- Improving sales for a range of services and products, or something quite specific.
- Reducing injuries and quality costs by seeking more staff support and buy-in to the organization's safety policies and procedures.
- Developing a greater capacity to innovate when solving customer service problems.

## Association objectives may include:

- Improving membership retention through greater involvement with association services.
- Developing personal skills by focusing on one sub-sector of the overall membership.
- Creating business development opportunities for members through forums and related strategies for collaboration.
- Improved membership revenues by identifying more and newer needs of members.

Regardless, every association must focus on using conferences to enhance the long term value of membership. Events are the ideal venue to seek insight and feedback on services and programs. These can be the seeds of future innovations.

It will be very difficult to use a model for measuring the value of the event if we do not first expand our understanding of why we are hosting or commissioning a conference. A well developed learning strategy can help (see Rules 3 and 4). Despite the obvious complexity of the issue of measuring a return, the main stakeholders of the event can play a role to make today's conferences as effective as possible.

## 1. Role of the association or corporation

The role of the association or corporation hosting the event is to ensure each conference has a concise and clear learning strategy. This should be defined in terms of why the event is necessary and what it is trying to achieve. This would include a series of three to five meaningful objectives that need to be achieved. This also should include enough detail to act as a catalyst for the creativity necessary to shape productive events. These objectives can then be used to help evaluate the conference – if it is difficult to put a dollar value

on the benefit, then some qualitative measures can be put in place to judge how well the event met the objectives.

## 2. Role of the meeting planners and the industry

The role of the meetings industry is to work with these strategies by understanding them and helping clients to achieve a wider range of benefits. Meeting planners often hold the budget for an event and must be open to seeking new ideas for making the event more effective to enhance the potential to reach the objectives (or surpass them).

## 3. Role of the speakers

The role of all speakers is to deliver content and motivation. While some speakers view the audience as a market for selling books and future speaking engagements, the majority would welcome a clear and concise set of objectives that they can review and contribute toward. Speakers must strive to understand the issues of the organization and present content that produces results, even if this changes their standard presentations.

As a speaker at many events, it is far easier to design a presentation or workshop when you have clear learning objectives for the audience. I can add specific elements to my program that reflect these objectives and I can reinforce the objectives during my time in front of people.

### Start with better conference evaluations

Most conferences use evaluation or feedback forms. The majority of forms are not written from the perspectives of learning and development. They are written from the perspective of one of two stakeholders:

- **Meeting planners:** These evaluations most often ask questions of the venue, meals,

entertainment, registration processes, and so on. Sometimes, they go into more depth to ask questions about the content. The problem with most is that the content is not isolated for individual speakers and workshops. It is written from the perspectives of themes like “Did you like the keynotes?” and “Did you like the workshops?” Most often a form is used at the end of event. At the end of a long conference, it is difficult to remember who the speakers were at the beginning of the program.

- **Speakers:** Speakers who provide evaluations want positive referrals and contact details to build their databases. This is to be expected as the vested interest of the speaker is to build their business.

It is also possible to take a tiered approach to evaluations:

- ① All participants can get a written evaluation. These are your quantitative results measured in overall statistics.
- ② Small groups of participants can be interviewed during the event much like a focus group. These can be particularly useful to ask questions about what actually happened at the conference plus what people would have liked to see. This provides a focus on qualitative results in terms of more in-depth opinions and feelings.
- ③ Research feedback can also come in the form of one-on-one interviews during the event. It is much easier to get some in-depth feedback during the event about what is working and what is not.

## Tips for developing more effective conference feedback processes:

### For the overall event

Design a form that starts with the name of the event and two or three main objectives for the event. This provides a valuable context for the event. Tell people what the event was designed to achieve. Let them decide what they feel is most valuable based on what the event was designed to achieve.

You can start by developing questions around these traditional themes:

- What do you think of the venue, the administration, meals, etc?
- What do you think of the speakers, the workshops and any other aspect of the content?

These may take 5 to 10 questions. You can also ask about any specific elements of the event that you added to it such as specific workshops, lunch sessions, entertainment, and so on.

You can also evaluate how the participants view their own participation:

- How would you rate your own participation in the conference? To deal with this question, you can create a scale (1 to 5) ranging from:
  - Passive – didn't make notes.
  - Active – made lots of notes, talked to speakers, and participants. Plan to use these after the event.
- Do you intend to review your materials (your personal notes, speaker handouts, sponsor materials, and so on) after the event?
- Have you taken any specific ideas and developed them further?
- Will anything stop you from acting on your ideas back at work?

To obtain this feedback, provide participants time to complete the feedback. Few events actually allocate five to ten minutes toward the end of the conference dedicated to giving people time to reflect on the event. This should be built in to the timetable to show that the feedback is truly important. Do not make it easy for people to leave without providing their feedback.

### For individual workshops and keynote presentations

The only way to get useful feedback on individual sessions is to have your participants evaluate these after each session. This should be based on three factors:

- ① Objectives: what is the speaker trying to accomplish with the presentation?  
This is easier for workshops and more practical sessions. For motivation keynotes or humor keynotes, this becomes harder to assess. The evaluation form can include two or three objectives set by the speaker for the workshop. This becomes the benchmark people can use to answer the question: were the objectives met during the session?
- ② What did people think of the content?
  - Were the ideas relevant, useful and thought provoking?
  - Was the content at the appropriate level for the audience?
- ③ What did people think of the presentation of the content?
  - This reflects concerns like style, pace, and clarity of the presentation.
  - Were the handout materials of a sufficient quality and usefulness during and after the event, and are they worth keeping? (I have talked to a number of major associations who found that participants left the large book of handouts in their hotels).

Some events do provide a short evaluation for each workshop. These best capture the immediate response to an event.

## Post Conference Feedback and Evaluations

Based on using email or on-line surveys, the best feedback measure will combine the factors above with a look back to reflect on what participants remember once they are back at work. Questions that can be used include:

- Looking back at the conference, what were the most important insights or ideas that you gained by attending this event?
- Which speakers or workshops did you find most useful?
- Which elements of the conference did you find most useful?
- Was anything missing from this event, such as topics you would like to hear, specific sponsors or better ways to present workshops?
- What is your overall evaluation of this event?
- Did you get value for your investment of time in this event?
- How does it compare to other conferences you may have attended?

What people learn and experience will differ from others attending the same conference. Clearly, the more they take home, the greater potential value the conference has to them and their success.

## What people achieve during the conference

If we develop the program to involve participants in a range of ways that interest and stimulate them – rather than just have them listening to a speaker after a speaker – then we stand the greatest chance of prompting people to achieve something

meaningful during the event. In the future, it is highly likely that a model to truly measure the ROI of a conference will require a measure taken at three different times:

- ① What people do differently at the conference
- ② What people do after the conference (within a week or two) when they are back at work
- ③ What people do differently long after the conference (three to six months after the event)

Essentially the question that will drive any discussion on return on investment is this: did it change the thinking or behavior in some way? Those conferences that do so in a way defined by its learning objectives that are linked to the overall objectives for the association or company will have a long future.

### *ROI Resources*

**MPI ran a series of articles on themes of ROI in the late 1990s. These and newer resources are available by searching on [www.mpiweb.org](http://www.mpiweb.org). Some of the many books on this topic include:**

**“The Bottom line on ROI” by Patricia Phillips.**

**“How to Measure Training Results” by Jack Phillips.**

**“Return on Investment in training and performance improvement programs” by Jack Phillips.**

**“Measuring Return on Investment Volume 3 Case Studies” by Jack Phillips.**

**“Evaluating Training Programs” by Donald Kirkpatrick.**

**See [www.innovativeconferences.com](http://www.innovativeconferences.com) for additional links to articles and downloads as this work develops.**



n o t e s

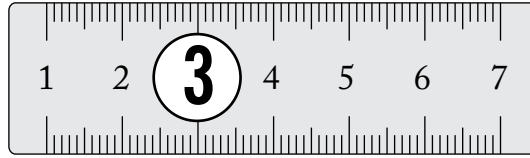
ideas to save  
quotes to remember



questions to ask  
actions to take



# RULE



## design your conference based on plans for logistics and learning — a new model for planning conferences

The vast majority of conference planning books focus on the thousand details of a conference. This reflects the management and logistics of a conference to ensure everything works on time, as planned and on budget. But an effective conference takes more than a focus on logistics. When creating a plan for *conference effectiveness* think in terms of logistics and learning.

When great logistics come together with well-developed learning strategies, the event creates *leverage*, the wow factor that leaves people saying, “What a great conference. Where do I sign up for next year?” Let’s review the terms:

### Logistics

Logistics tend to take most of our energies. Logistics involves everything from selecting venues to registration to name tags. Logistics involves getting people to the venue and through the venue to ensure everyone is where they are supposed to be at the right time. Effective logistics is best measured by how easily everything falls into place during the conference, knowing that hundreds of decisions have already been made and a small army of people are coordinated to make everything seem easy!

Here’s the paradox. If you audit the amount of time and energy the typical conference committee invests in the planning of logistics in comparison

to the amount of time invested in the development of learning and content, I believe it would be about 80 percent in logistics and 20 percent on content. I have been at planning sessions where long discussions were held about the color for name tags leaving the discussion on presentations to a few minutes at the end. The amount of time invested in logistics must be matched by that invested in the learning and leverage aspect of the event. After all, that is what the paying participants want!

### Learning

Consider “learning” to be everything that happens inside the conference and breakout rooms. Conferences must be driven by objectives for presenting, sharing and creating information.

Research from Meeting Planners International found that:

“Meetings should be planned around clearly identified problems or issues with specific desired outcomes. These outcomes should dictate the form and process of meetings. Meetings should be viewed as learning experiences designed to change the behavior of attendees.”

People who attend conferences go to get new ideas, meet people, get motivated and get a break from their day-to-day work. The form, process and structure of the event must be carefully

conceived to maximize the opportunities for people to get new ideas and then to act on them. This is much more involved than breaking a day into six slots that need to be filled by a speaker. It is carefully assessing what participants “need” in the upcoming year to be successful and finding the best ways to get this information to them.

A good learning strategy starts with a clear understanding of why people will attend your conference and what they need to:

- ① **Learn, explore and share** – this can range from new product information to new processes to new personal development skills.
- ② **Change** – many events are used to launch some form of change, perhaps in behavior (e.g., sell more, more teamwork), in direction of a company if a strategy is launched, or in focus if new legislation or significant challenges will impact in the near future.
- ③ **Create** – this is perhaps the least developed objective of the conference industry. Can people create solutions to important challenges? From an innovation perspective, the best opportunity to solve a challenge is when everyone is in the same room at the same time. Take advantage of this opportunity.
- ④ **Motivate** – this is crucial for many industries and organizations today. While we associate motivation with sales conferences it is also important to prompt people to take new initiatives.

## Prompt new thinking by reviewing your events

New ideas are hard to find unless you challenge yourself to think in new ways. We need new ideas and insights to shape a learning strategy. Here are some specific questions on conference design to prompt your design thinking.

Start by doing an audit of your last conference or the conference plan you are putting together. Think about these questions for your event. There is a specific planning tool for each question in Rule Four that you can use as an outline for a learning strategy. For now, understand the intent of each question.

- ① **What is the focus of your content?** Start with the facts by looking at your event in terms of how content is presented today. What percent of your content (defined in terms of all of the keynote and workshop presentations) is one way, two way, or driven by the audience?
  - One-way refers to a speaker speaking to the audience.
  - Two-way involves some interaction with the audience.
  - Being driven by the audience reflects techniques like Open Space, group brainstorming sessions, or panel sessions in which the participants lead and drive the discussion.
- ② **Define how much involvement you want from your participants.** Is showing up enough or should you plan to harness their brainpower when everyone is in the same room at the same time?
- ③ **What objectives could you create based on MPI research?** What type of change in behavior do people need to adopt to be more successful? This can range from in-depth knowledge of a specific important topic for the audience, more teamwork or collaboration, or it could involve learning new personal insights that caused people to reflect and say “I never thought of that before.”

## Logistics + Learning = Leverage

When great management plans combine with a great learning strategy, something great happens. I call this 'leverage'. It is the trickiest element. It is the X-factor. It is creating value for conference participants in a way that they are not expecting. It is breaking the rules and creating a total experience for participants intellectually (the ideas, what they think) and emotionally (what they feel).

It can be the overall agenda, something totally new like a business simulation, or a location that is used in some new way. Once in a while, a speaker makes it happen.

I attended the National Speakers Association conference in 1997 in the U.S. A deaf woman gave a powerful closing speech talking about the discrimination she experienced. This was inspiring but it was overshadowed by a blind pianist who had a talent to compose music as he sang. His job was to create a musical summary of each keynote presentation. He was so touched by this woman that he created a song for her. He pounded the keyboard passionately and sang so she could feel the music. He sang:

"A blind man singing to a deaf woman.

Someday...I'll see the lightning and...you'll hear the thunder.

A blind man singing to a deaf woman.

Today...I'll see the lightning and...you'll hear the thunder."

Two thousand people sat still. Some cried. The pianist captured the angst and passion of having a handicap in way that reverberated in the hearts of people. You knew something special had just happened.

You can't plan for this impact nor can you expect speakers to do this for you. When it does, consider it a bonus. How can you create a more powerful experience? The answers will be found in finding what is unique about your event, its people and bringing something new, original or

meaningful to life during the event. That takes creativity.

The process begins by defining a clear and compelling purpose for the conference. Whether it is an annual event or a special event, every conference must be created to achieve the vision of what participants need to be successful in some way. Otherwise, why waste so much resource in planning something that does not achieve much? This can be a half page statement of the essence of what the conference is designed to achieve.

Most conferences in fact have a theme such as:

- Power in our purpose
- Knowledge and innovation in everything we do
- Building community, forging solutions, saving lives

A theme is not a learning strategy. Nor is it a particularly useful tool for designing a conference. As a speaker I have asked for information about a conference to be told, "Our theme this year is 'fostering creativity and reaping innovation'." When I ask what this means or what the event is designed to achieve, the response is very limited. It becomes challenging to design a workshop or customize a keynote presentation when the concept behind the event is shallow. The solution is found in developing this to a statement of purpose. The case studies at the end of this section offer some ideas for you.

In a practical sense, you can start with a theme and then develop a fuller statement of what the event is designed to achieve or begin by writing a full statement of intent and then the theme will appear. This is like asking, "Which came first... the chicken or the egg?" It does not matter as long as the process leads to a clear and concise overview of what the conference is designed to achieve. From this type of vision, it becomes relatively easy to define the strategies and parameters for the conference.

This would include issues such as:

- ① The types of presentations to use, the mix of keynotes to workshops, idea factory brainstorming sessions, etc.
- ② The types of speakers to consider, whether professional speakers, members, government, suppliers, and so on.
- ③ The degree of new ideas and innovations to use.
- ④ The use of a conference “weaver” or facilitators, navigator guides or other techniques or tools to make conference participants more effective in their participation.

The Rules that follow will provide numerous case studies and ideas that can be used once you have a clear understanding of the conference.

A statement with this depth is meaningful but it takes a great effort to create. It sets an expectation for speakers and the association to live up to. People who attend the event will immerse themselves in the best thinking and presentations that will leave them with greater insight into how values shape, develop and grow organizations and our contribution to their success.

A statement like this is also the best tool for both planning initiatives.

- ① Learning planning group: this overview will now be used to design the actual event. It can guide the selection of presentations, workshops, speakers and other features.
- ② Logistics planning group: the overview defines the type of experience that this conference wants to create for the participants. This is the ideal starting point for establishing the logistical plan for the many elements of the event.

This overview is also useful for other stakeholders in the event:

- The host organization: Whether an association or corporation, such a statement also sells the potential value of the conference and helps to justify the investment in the conference. It can also provide the framework for the evaluation of the event.
- Speakers and presenters: A statement like this makes it easy for speakers to understand the event and for speech writers to build the theme into their presentations.
- Marketing purposes: People will understand what they will experience during the event. The words can be used in brochures, websites, media, advertising, and so on.
- Sponsors: It makes for a clear and compelling reason for sponsoring an event. It may provide the opportunity for sponsors to create or provide materials related to the theme.

Planning a conference based on a learning strategy and a logistical strategy offers many advantages. There are numerous books which can help with the management of a conference. They offer advice, links to conference planning software and a wealth of resourceful ideas to manage the many details of an event. This is very important but must be combined with the learning plans.

A practical way to write a learning strategy for a conference is to start with the “vision” of the conference and its theme. Then use the planning tools in Rule Four to lead to decisions on the types of involvement you want from participants. A complete step-by-step process for creating a learning strategy is provided in the final section of this guide.

## values as a theme for a conference

The Human Resources Institute of New Zealand designed its 2005 conference on the theme of values. Many organizations focus on values but what made this event special was the vision created for the event. Beverley Main, CEO of the Human Resources Institute of New Zealand wrote the following vision for the conference. This was later used in brochures, websites and media materials.

### **Why Values, Why Now?**

It seems odd that we can run a whole conference around a theme of 'Values' — aren't values an integral part of everything we do, a 'given' and doesn't everyone already know about values?

Apparently not. In a society at a time in history when integrity is just another buzz word in the mission statement on a company's wall, when work comes before family, when being honest can get you fired and when staff retention is akin to finding the holy grail, it seems that the world of work for some has truly gone mad. So why not values?

We're living in times never before experienced. Looming labor shortages, an aging population that's growing faster than ever, half the world distrusting the other half, an economy that's solid one minute and soft the next — where will it all end? And what does it mean for those poor souls working in people management?

In putting together this year's conference program it seemed that many others shared our concerns. We received a record number of applications from experts in their field who wanted to speak out about their experiences and lessons they'd learned when working with (and sometimes without) clearly defined and aligned values. We've never attracted this much interest before around a conference theme, nor this much controversy.

This conference will address the four main areas of your working life: Social Values, Corporate Values, Personal Values and Developing Values.

**Social Values** will address such things as how organizations benefit by addressing social and environmental issues in their planning and operations; how diversity is approached in the workplace; the role that corporate social responsibility plays in the attraction and retention of employees.

**Corporate Values** will deal with the value of human resources as a return on investment; the value that HR adds to an organization's competitiveness and sustainability; employer branding; the impact that culture has on the success of an organization; increased productivity and the HR paradox; integrating people management and performance with strategic goals to lift the game and the bottom line; values-based leadership.

**Personal Values** will cover why people work and what's in it for them; the relationship between personal ethics, integrity and career advancement; managing their own work/life balance without being a martyr; remuneration and why HR is often undervalued; developing a culture of trust and knowledge sharing; creating an environment of candor.

**Developing Values** will look at how a high performance organization can be created through the development of the right values and vision within its people; growing our own — investing in the learning and development of our future workforce; coaching and mentoring as an investment not a cost.

If you value the contribution that work makes in your life and vice versa, be there...

Beverley Main, Chief Executive

[www.hrinz.org.nz](http://www.hrinz.org.nz)

## the PTA: parent teachers association, USA

The PTA developed the following message to define the essence of its annual conference for leaders within the PTA. The style of writing and language was clear and concise. It said:

***President's Message:***

The strength of PTA is measured by the strength of its leaders. As PTA's national president, I appreciated the many opportunities I have had to participate in leadership events and I continue to benefit greatly from the training that PTA offers me. You too, as an established or emerging leader of PTA, can take advantage of the great learning opportunities available in September at the Leadership Conference and in October at the Minority Leadership Conference. Learn more about running an effective and efficient PTA that will gain more members, involve more parents and deal with important issues. Help make your PTA stronger to better serve the children in our communities and across our country.

Anna Weselak  
PTA national president

From this concise statement participants and speakers know that the event is designed to help people learn more about running an effective and efficient PTA that will:

- Gain more members,
- Involve more parents, and
- Deal with important issues.

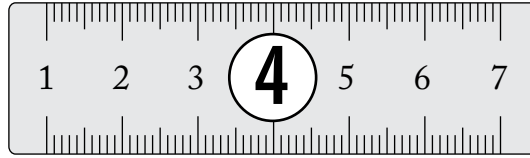
An astute speaker will know that their presentation must focus on these challenges to be successful. The following promotion was written to attract the attention of participants. The PTA could also use the following overview to ensure the final event delivers on these promises by designing its feedback questions to deal with these issues:

***This conference is for you if...***

You are a current PTA leader who wants an opportunity to recharge, reconnect with fellow leaders, network, and acquire new competencies to use in your role. As a leader who serves the school community, you need to make time for your own development. Stay abreast of the nation's important issues in education and realize how you can continually grow in your abilities to lead a group of volunteers. You will be inspired to reach out-of-the-box, challenge traditional ideas with new concepts, and build even greater capacity to collaborate with your school community.

[www.pta.org](http://www.pta.org)

# RULE



## learning objectives drive the design of your content

To begin our development of a learning strategy, it is helpful to use an innovation tool developed by the Idea Factory to look for new insights into a situation. It is called *Make the Implicit Assumptions Explicit*.

It's a simple technique to identify all of the assumptions that are involved with the current design of your conference. For example, focus on these questions as background to the design of the content of the event:

- ① Exactly how do you want to involve people in the event?
- ② What do you want people to achieve or create at the event?
- ③ How can the conference be used to provide the insights, contacts or opportunities that add directly to the bottom line of the participants?

To make the “implicit assumptions explicit” I have developed these three questions into worksheets. These innovation tools help uncover the underlying assumptions of the current design of our conference. To make the implicit design assumptions “explicit” means to make them obvious. This allows you and your team to step back, think about the assumptions, and decide whether it actually makes sense. These assumptions are always built in. It is better to recognize, acknowledge them and then decide whether you need to make a change.

For example, Tool Two is a list of increasing levels of possible involvement at a conference. For some events it appears that some event organizers are happy if people simply show up! In this case, the meeting planners would have to admit that their concern is that people show up with little regard for what they go home with. But is this good enough? By defining the exact way you want people to participate in your event, you can prompt new ideas to achieve that level of involvement. Perhaps you should consider how you could create opportunities for a round table session at which groups of eight people brainstorm solutions to a specific challenge.

You can use the following tools as a way to prompt your thinking to find new and more powerful ideas to shape the conference experience for your participants. It is worthwhile to invest some time in analysis to shape more powerful events. While there are many ideas you can copy in this guide, you must use these tools to prompt and focus discussions that lead to new and original ideas.

To create an innovative event, you must be able to look at the same situation that everyone sees but see it in a different way. This the way we can start to notice the differences and distinctions that can make your event even more effective. The best way to find new ideas is to think about the questions that arise. Challenge yourself and the planning group to find answers that lead to new ways of presenting content.

## Tool one: What is the focus of your content?

Tool one focuses on the involvement you want from your participants. It may sound like an odd question but how do you want your speakers (both keynotes, workshops and other presentations) to engage participants in the conference? This shapes the experience people will have with the conference.

Consider your last conference when answering these questions to assess your event in the chart that follows.

To start, review your last conference from the perspective of three basic levels of participant involvement. Look at the number of keynote presentations and workshops, and whether or not they involved participants. Add up the amount of time your conference plan allowed for these three levels of participation.

How much of your conference involved:

- ① **One-way presentations?** The speakers speak to the audience. There is no interaction nor is the participant involved in any meaningful way. This is the typical keynote presentation.
- ② **Two-way presentations?** Participants are expected to get involved in some meaningful way. This may be participative workshops (but not all workshops are participative).
- ③ **Reversed content?** These sessions are those like Open Space Technology in which the participants and their expertise drive the session.

Here is a fuller explanation of these three levels of involvement.

- ① **What degree of your “content” is one way?** One way means that your speakers as “experts” speak to the audience. The audience has one job: to sit and listen. This is most often as a keynote presentation and sometimes as a breakout workshop. The range of keynote speakers is very wide but the common element is that the audience is expected to sit passively and listen.

- **Celebrity speakers** – these individuals have done something to make them famous enough to be recognized by the public. The best speakers package their stories into entertaining keynotes.
- **Motivational speakers** – these speakers can be sports stars, those who climbed mountains or those who have overcome some handicap to achieve something. Motivational speakers are generally storytellers who leave audiences feeling good about themselves and the potential for their own success.
- **Informational speakers** – these speakers have an interesting or unique perspective in some business or scientific perspective. They may be management experts or academics who can offer important information.
- **Political speeches** – these may include politicians or board members of an association. These are often about promoting a particular issue or position.

### ② **What degree of your “content” is participatory?**

To what degree do participants listen to the expert and are expected to do something with the content such talk to a neighbor, ask questions or connect it to their own experiences? This could be a keynote presentation or a workshop designed for engagement. Some speakers are very good at engaging participants in meaningful ways. Not all workshops are participatory. Some are lectures or more like key note presentations.

### ③ **What degree of the “content” is reversed?**

To what degree does the focus change to the participants as “experts” who speak, lead or contribute to the content or presentations of the event? This could be question and answer sessions, Open Space Technology, brainstorming sessions, ‘meet the pros’



sessions, business simulations, or a presentation of ideas from the audience. These sessions are quite different to a typical workshop session. Most events have very little reversed content in their design.

## CASE STUDY 4A

### reversed content — meet the experts

This is ideal for any association conference or a way to further involve your speakers.

The National Speakers Association and the Canadian Association of Professional Speakers include a “meet the experts” workshop in their design. This involves about 30 or more conference participants creating a 20–25 minute presentation on a broad range of topics. They are expected to deliver this session three times over a 90 minute workshop.

The setting is a large room full of round tables with about 8 chairs around each. An expert is seated at each round table. There is room for another 7 or so people at each table.

People pick up tickets for the three experts they want to visit on a first come, first served basis. An MC rings a bell to start the session and people move to the first ‘expert’. The bell rings again to end the session and to prompt people to move to their next ‘expert’. This process is repeated until people have moved to participate in three mini-workshops.

This is a highly effective way for people to meet and learn from a range of experts.

*What is an engaging presentation?*

- It makes you feel something.
- It makes you think.
- It creates an experience.



### Tool two: Define how much involvement you want from participants.

Start with this simple assessment of how you want your participants to participate. What do you want them to do at your event? Consider this the second step in the process of shaping a great event. These levels of participation may seem obvious but far too few events get past the minimum level of involvement.

To start, review your past conferences in terms of how people participated. Secondly, set a new target for designing your event based on how you want people to participate:

#### Level 1: The Minimum Basics:

- ① People show up for the conference and its presentations. Speakers show up as well!
- ② People attend sessions (which often gets challenging toward the end of the event).
- ③ People actually listen and hear what is presented.

#### Level 2: Creating a learning event

- ④ People ask questions. They are curious and interested in the presentations and workshops.
- ⑤ People listen, ask questions and make connections to find insights. People say things like, “I never thought of that before.”
- ⑥ People are presented with ideas from speakers and they get time to work to create something or achieve something.

- ⑦ People find and capture ideas that they see of value right away.

### Level 3: Creating an innovative event

- ⑧ People contribute toward solving or defining some common challenges. For example, one or more sessions are designed to involve participants to tackle these challenges:
  - What are the two biggest challenges that you will face this year?
  - What are two ways to improve our business?
- ⑨ People find ideas and get some time to shape them into personal or business opportunities at the conference.
- ⑩ People find ideas and have the time to create plans to launch them after the conference.
- ⑪ People continue to act on ideas in the future based on a conference design that extends the relationship with participants into the future.

These levels are presented in a chart in Tool 2.

Although these degrees of involvement may seem quite simplistic, these are the building blocks that should direct the style of speakers, workshops and related tools that you should invest in. For example, for people to find insights and ideas that have meaning to them, they need time to work with ideas to create something of value. At minimum, your program must allow time for this to happen. Moreover, you could design a workshop session that allows people some flexibility to advance some ideas before they leave the conference.

### Tool three: Defining the learning objectives for your conference

Several years ago, Meeting Planners International (as quoted on page 2 of this guide) made a number of recommendations for the design of meetings based on research it had undertaken. This produces

an ideal framework to draft your learning strategy.

It proposes four key recommendations. These have been reproduced in Tool 3 as the final step in shaping your learning strategy:

- ① **Meetings should be planned around clearly identified problems or issues with specific desired outcomes.** These outcomes should dictate the form and process of the meeting. These issues and problems should be outlined in your vision for the conference (review Rule 3) and be summarized by the overall theme of the event.
- ② **Meetings should be viewed as learning experiences designed to change the behavior of participants.** The challenge for meeting designers is to dig into the corporate or association issues to define what can be influenced, changed, promoted or advanced in some way to benefit participants. This can reflect personal or business development issues. Some events focus on bringing company values to life while others are intended to prompt sales people to sell more through new approaches.
- ③ **The agenda, pace of the meeting, amount of content, delivery methods, and degree of relevance are critical factors that must be carefully planned.** Tools 1 and 2 are designed to help with this. The issue of pace, amount of content and delivery methods can also be used as a checklist when you review the design of your event.

### Learning Strategy Planning Worksheets

Each of the three tools in this section offers a valuable planning perspective to make the implicit assumptions about your event explicit. Use each of the tools on the following three pages to review of your past conferences and to discuss the issues. They are the foundation on which you can design your conference. They are also reproduced in the Learning Strategy Planning Worksheets at the end of this guide.

# what **drives** participation and **engagement** at your conference?



Look at the brochure or program from your last conference to determine the amount of time that was invested in the different types of presentations.

	Percent of your content as measured at past conferences	Target for future events
<p>1. What degree of your “content” is one way? <i>Your speakers as “experts” speak to the audience. The audience has one job: to sit and listen. This is most often as a keynote presentation and sometimes as a breakout workshop. It may be a motivational speaker or the president. The range of keynote speakers is very wide but the common element is that the audience is expected to sit passively and listen.</i></p>	%	40–60%
<p>2. What degree of your “content” is participatory? <i>To what degree do participants listen to the expert and then do something with the content such talk to a neighbor, ask questions or connect to their own experiences? This could be a keynote or a workshop designed for engagement. Not all workshops are participatory. Some are lectures, more like a keynote.</i></p>	%	25–50%
<p>3. What degree of the “content” is reversed? <i>To what degree does the focus change to the participants as “experts” who speak, lead or contribute to the content or presentations of the event? This could be question and answer sessions, Open Space Technology, brainstorming sessions, meet the pros sessions, or a presentation of ideas from the audience. These sessions are quite different to a typical workshop session.</i></p>	%	10–25%





tool  
2

# how much involvement do you want from your participants?

	<b>The Minimum Basics</b> One way communication	<b>Creating a learning event</b> Two way communication	<b>Active Participation</b> Participant driven conferences
Different levels of involvement that are possible at a conference	<ol style="list-style-type: none"> <li>1. People show up for the conference and its presentations.</li> <li>2. Speakers show up as well.</li> <li>3. People attend the sessions they book.</li> <li>4. People actually listen and hear what is presented.</li> </ol>	<ol style="list-style-type: none"> <li>5. People ask questions. They are curious and interested in the presentations and workshops.</li> <li>6. People listen, ask questions and make connections to find insights.</li> <li>7. People are presented with ideas at the conference from speakers, and various presentations that they work with.</li> <li>8. People find and capture the ideas that they see of value right away.</li> </ol>	<ol style="list-style-type: none"> <li>9. People contribute toward solving or defining some common challenges.</li> <li>10. People find ideas that they shape into personal or business opportunities at the conference.</li> <li>11. People find ideas and then create plans to launch them after the conference.</li> <li>12. People continue to act on ideas in the future.</li> <li>13. The event continues to engage people long after it is over.</li> </ol>
Potential strategies	<b>One way communication</b> creates awareness of key issues but you can't tell if the message stays with people.	<b>Two way communication</b> allows more knowledge to be created.	<b>Active participation:</b> new ideas and innovation are possible.
Types of activities:	Encourage keynote speakers to incorporate learning objectives. Add value by adding a few minutes for participants to reflect after each session. See Case Studies: 5F, 6A, 6B, 6C.	People start to find personal meaning in what they hear and experience. Use Rule 6 for networking ideas. See Case Studies: 1A, 5B, 5C, 5J, 5K, 6D, 6E.	People create something of value after attending the event. See Case Studies: 5A, 5D, 5E, 5G, 6F.
Your ideas:			



# enhancing the “learning objectives” of your conferences

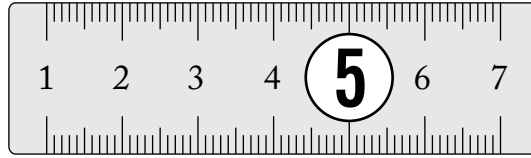


Meeting Planners International studied the effectiveness of meetings and conferences and recommended three perspectives for making them more effective. These give you insights to enhance or improve the effectiveness of the conference.

MPI Research Recommends	Brainstorm the key implication of the research Finding..
<p>Meetings should be planned around clearly identified problems or issues with specific desired outcomes. These outcomes should dictate the form and process of the meeting or conference.</p>	<p><i>What are the specific issues, problems or challenges that the event is designed to achieve?</i></p>
<p>Meetings should be veived as learning experiences designed to change the behavior of attendees.</p>	<p><i>What behaviors are you looking to influence, change, promote or advance?</i></p>
<p>The agenda, pace of the meeting amount of content, delivery methods, and degree of relevance are critical factors that must be carefully planned.</p>	<p><i>What the special features could be built into your event?</i></p>
<p>Therefore, what do you want people to do with the ideas and information they get at the conference? How does it contribute to their personal and business success?</p>	<p><i>How should they use their ideas in the future?</i></p>



# RULE



## always use the brainpower of an audience to create something – ask “what can we create here?”

Although many people talk about brainstorming, few people have actually read the book where the term was introduced. In 1953 Alex Osborne wrote *Applied Imagination* and talked about a process that involved, “...using the brain to storm a creative problem...and do so in commando fashion, with each stormer audaciously attacking the same objective!”

Osborn’s idea of harnessing the brain is an ideal way to leverage the collective brainpower of the audience. Otherwise, it is a tremendous waste of potential to provide the content of a conference and not use the creative capacity of the audience to benefit all participants. You may find it interesting to note that the original context for *using the brain to storm through problems* was that too many problem solving meetings ended up with poor ideas and decisions.

It’s a rare conference that actually uses the expertise in the audience. For example, what if you convert a keynote presentation into group brainstorming session to engage people in a meaningful way? This can create new knowledge and insights that can benefit everyone in the room (plus others who did not attend the conference if you turn this into a report or booklet).

You will find case studies to prompt your thinking. An association or a corporation can use a conference session to engage people in a wide

range of ways. There are several golden rules for engaging an audience to turn people into an idea factory:

- If you want people to contribute their ideas toward solving a problem or creating an initiative, know how you will use the ideas. Be very clear with your audience that all ideas will be collected, assembled into a document, assessed and so on. If you have no intention of using the ideas do not ask for them.
- Hundreds of people can brainstorm at the same time if the session is organized and structured. The use of round tables is perfect as this is ideal for tabletop brainstorming. Sixty tables of 8 people gives you about 500 people who can provide 3000 ideas.
- Be very clear with the details for each table. Each table or group needs a clear and concise written one page statement of two things:
  - ① What is it that you want them to discuss and brainstorm? This must be absolutely clear and concise.
  - ② What do you want each table to produce with their discussion? If you want four quality ideas from each table, say so explicitly and leave room for four ideas on a page that is collected or returned.

- After collecting the many ideas, tell your audience what will happen next. Make sure they feel that their contribution was important.
- Never make it impossible for someone to contribute their ideas. See Case Study 5I: How not to involve your audience. Never compromise on the design of this session and use a facilitator to help design it if necessary.

## A simple way to engage audiences: Your Big Challenges

Here is a simple process I have used several times called “**Your big challenges for next year.**” You can use this model to design such a session:

- Change a keynote from 75 minutes to 40 minutes to prompt the audience to reflect on a specific topic. Use this keynote or presentation to set up the discussion. It should be thought provoking in some way.
- Have the MC or president set up the second phase of this session with five minutes to outline the need to ask one simple question: what is the biggest challenge you will face next year?
- Prompt participants invest 10–15 minutes to write something meaningful.
- These are collected. You can read a couple of them to show the importance of this feedback.
- Tell the audience what will happen to their ideas.

A second option is to have people discuss their challenges at round tables for 15 minutes before writing them down.

This format has been used by some events to generate hundreds of ideas which associations turn into articles for newsletters, themes for workshops, and ideas for new services.

The term idea factory simply refers to any event designed to generate new ideas. The use of idea factories along with workshops and keynotes should be carefully designed to create more impactful results. The proviso for using this approach is that the company or association must use the ideas that are generated.

These types of audience involvement processes can have a dual focus.

- ① The first relates to the technical aspect of the program. Whether the event is for lawyers, Ford Truck owners, nurses, teachers or environmental workers, people need content. This reflects the ideas, insights, and knowledge that are presented, discussed and used in some way. Often this is a technique or industry specific content. Outsiders may wonder at the jargon and technicalities but the audience loves it.
- ② The second relates to people as individuals, businesses or organizations. This reflects the many issues involved with managing their lives, careers or businesses. Everyone is interested in new ways of thinking or change when they see a benefit. Often a speaker may raise a unique perspective which quickly gets forgotten, as people do not have time to reflect on it.

You can focus on either aspect. People need results from a personal and technical perspective.

### How will you close your conference?

There are many opinions on how to close a conference. Some events have a formal close that matches the opening session. It may involve a complex ceremony of lowering flags and closing speeches. Other events simply end with the last



workshop. There is no ceremonial connection to the participants.

My observation is that most meaningful conferences end with everyone in the room having the same experience. This can review the conference in terms of showing pictures of the participants and a brief summary of the core ideas from the main presentations. This is an ideal way to remind people of the presentations, people and possibilities from the conference.

You can also provide 10 to 15 minutes toward the end of the event to talk about the need to manage the many resources people were given during the conference.

The most successful and memorable events often have a facilitator create an informative summary of the event. This is not just a summary of the social events but of the key ideas presented at the conference.

- During this closing session, encourage people to review their materials by looking through their notes, handouts, business cards and brochures. Prompt them to find the important ideas or insights, those ‘aha’ moments which justify their investment in your event.

- Remind them of the value of the variety of speakers and what needs to be done after the event. Often simply suggesting that people invest “30 minutes to find a year’s worth of ideas” is enough to get many to commit themselves to a personal review once back at work (or on the trip home).
- Prompt people and give them a few minutes to decide which ideas they will take advantage of back at work.

The best way to leave your participants wanting to come to the next event is to demonstrate the value of the current conference. The more ideas they act on after the event, the more value they will create from their investment in this event.

## Case studies

Here are some case studies of events to kick start your design thinking in terms of harnessing the brainpower of your audience. You can use these ideas as a base to develop customized solutions for your events.

Here are a series of case studies selected to demonstrate a range of ways to involve and engage people. In some cases, they provide lessons of *what not to do*. I have then added ideas to fix the problem. If your events involve and engage people and you want to share your ideas, please email the details for possible inclusion in revised versions of this book.

## CASE STUDY 5A

### Getting your audience to create a book or manual

#### *Australian Institute of Engineers*

The focus of this one day event was leadership for “innovation”. The audience was 230 CEOs from large corporations and very senior public sector managers. The seating was groups of 7 or 8 people at round tables.

I was asked to be the fifth speaker on innovation. Instead I proposed to introduce some research on ten factors that make innovative organizations “innovative.” I designed an idea factory to have each table pick a facilitator and then gave each a one page challenge. I randomly distributed these challenges to allow each table to focus on one factor only. Each table was asked to come up with five ideas to support that specific factor. After a 10 minute introduction, the focus of the session shifted to the individual group session at the table level. It was made clear that each table facilitator was to summarize the key ideas on the form that was provided.

About 300 ideas were then collected and later published in a booklet which was distributed to all participants. This booklet summarized the theme of innovation, provided all of the ideas and enhanced the reputation of the Institute of Engineers in the eyes of senior executives.

Idea: Use your audience to generate research, ideas, processes, challenges or other important ‘calls to action’. Be creative in how you generate ideas and then use the ideas to create value for the participants.

Challenges could be:

- What are the big challenges you face next year?
- How could we make this a better company to work for?
- What have our customers said is ‘wrong’ with our company?
- How could we improve the way we service our customers?

# CASE STUDY 5B

## Defining what people need to know

### *Global Business Women's Network Conference*

This Australian women's conference was designed to provoke new thinking in business. Rather than starting with speakers, the learning strategy defined three themes that were important for success in business.

These were:

- ① Business models for success,
- ② Exploring the digital culture: finding your ramp onto the information superhighway, and
- ③ Transforming the female myth: selling, negotiating and closing.

This led to a conference with the theme of "new ways of working, thinking and leading."

A panel of experts for each of the themes was put together headed by a "thought provocateur."

Each used the same format:

- A *Thought Provocateur* introduced the theme and highlighted its importance for 20 minutes. This title was selected to tell people what their job was.
- Three speakers were then given 15 to 20 minutes to contribute their perspective. As these were short, they had to clear and concise.
- The 400 participants were seated at round tables and were given 30 minutes to discuss the topic and come to a conclusion for each table. They were also expected to define one or two questions that they would like to ask the panel.
- The final element was a question and answer section hosted by the thought provocateur based on the submitted questions.

This format was used for all three themes. There was also an opening and closing keynote to provide a context and challenge for the audience. The result was very positive as it gave people new insights and time to reflect and create meaning for themselves. People were also given the time to define the follow up plans that they would commit to.

Idea: Pick the important themes and then develop 'mini' conferences for each theme.

## Design your event on a university model

The National Speaker Association created an innovative conference much like Case 5B. Four themes were selected for members. It was packaged on the idea of a university. Participants had to select one "major" to study and one "minor" to study. One person was selected to develop each school. They selected expert speakers for that theme. Each Major was a mini conference as it

involved a full day speakers and workshops. People had to attend the entire day. The Minor themes were a half day. There was an opening session to explain the concept and a closing session. There was no main keynote. The benefit is the intensity of learning that takes place. It was a successful event.

## CASE STUDY 5C

### Using a Conference Weaver

A number of events are using a speaker to go beyond the traditional MC role in terms of opening the conference with an introduction to the event (in terms of what you can accomplish at this conference), setting the scene plus breaking the ice to open people up to each other.

They prompt (or provoke) people into taking a more in-depth look at the content of the event and how to take full advantage of it. Often they will close each day with

a summary of the content as a reminder and a preview of the next day. They often connect the messages from different speakers and presentations. The best conference weavers will close the event with a brief session to remind the participants of the many great presentations and the need to take advantage of the content back at work.

Idea: Use the services of a conference weaver to keep people focused on their personal results.

## CASE STUDY 5D

### Changing the way participants “navigate” the conference

#### *Canadian Society for Training and Development*

The Executive Director wanted to make a major impact on participants and used the Conference Navigator Guides.

The Navigator Guides replace the standard “tool” of a conference – *the blank pad of paper* – with a journal that prompts people to be more effective participants. The Navigator Guides combine a traditional journal with editorial pages with many ideas, tips and suggestions for getting more value from a conference.

At the beginning of the event, the president of the Association provided an opening address that stressed the need for participants to take full advantage of the event by listening and taking notes more effectively. She told participants to open their Navigator Guides and to start navigating. She provided some highlights

to spark their imagination. It worked. Throughout the event, people were reminded of the need to continually navigate and to ensure that they reviewed their notes once they got back to work.

Post conference (online) research found that about 54 percent said that the Navigator Guides were either ‘very’ or ‘extremely’ important to the success of the event. Another 28 percent said that they were ‘somewhat’ important. The objective of the Navigator Guides is to change the behavior of people: from attending conferences and never looking at their notes again, to using their Navigator Guides to bridge the gap from the event to the reality of the workplace. Many events have used the Conference Navigator Guides over the past six years. See Rule 7 and the appendix for more information.

## Helping Participants turn an idea into action

*Inc.* Magazine’s conference group wanted to add more value to its conferences. We were asked for ideas to help people take advantage of their ideas more effectively. We designed a post conference innovation workshop. The objective was to create an “insights into action” workshop to start participants acting on their ideas in a meaningful and tangible way.

There were three parts to the workshop:

- ① Background innovation concepts for developing and judging ideas – about 2.5 hours.
- ② Group interaction to practice the new skills – about 90 minutes.
- ③ Individual time to develop their own idea – about 2 hours.

Participants identified one idea or insight they had at the conference that, if implemented would make a bottom line contribution to their businesses. People were taken through a series of workshops to help them develop this concept to its fullest.

By the end of the day, most people left with new skills and four or five pages of detailed action plans. Some people were ready to launch an idea that they

conceived that morning. For example, one executive from the U.S. Midwest region represented a fourth generation family sausage business. He wanted an idea for marketing sausages. Another participant who knew nothing of the meat business suggested he promote BBQing. What seemed so obvious in retrospect was a strategy the company never pursued.

He saw the value right away and spent the day brainstorming ideas such as sponsoring a BBQ competition in his region, having a BBQ book written, changing their advertisement to showcase BBQing, offering incentives and prizes of BBQs on the packaging, and so on. He left with five pages of detailed ideas to advance this concept further.

The workshop was marketed as a separate workshop and it created a new revenue source for the conference. About 10 percent of the total audience invested several hundred dollars in this extra workshop.

Idea: Include an extra session at the end of the event to give people time to create their own follow up plan. This can range from 10 minutes to a full day post conference workshop.

## How to use a great speaker poorly: Canadian example

The motivational speaker was inspiring. He was a former Canadian professional football player who suffered a major brain injury in a terrible traffic accident. From a dynamic larger-than-life well known personality, he had to start life again. He had little or no memory of his wife, his family or his sporting achievement. Nor could he remember his speeches. He needed a deck of cue cards to remind of him of what to say next but this did not stop his message from being very powerful and memorable.

He opened the conference and ended at the right moment. People applauded. People left, perhaps a bit weepy.

A group of us sat as people left because we felt that his message deserved more reflection. We discussed this question: what moved you the most about his talk? The result was a meaningful conversation and allowed us to revisit his stories and insights. This discussion allowed each of us to create our own personal meaning of his message. Here lies the dilemma: we were late for the next session despite getting this value from his talk.

How many great inspiring speakers fail to connect with an audience as people have no time to reflect and to create their own meaning? Build in an extra 20 to 30 minutes to get the extra value from your investment in your high profile speakers. Have your MC start a conversation at your tables based on this question:

Which of the speaker's main messages was the most meaningful to you?

Discuss this in groups and share insights.

You can take this one step further by getting teams or groups to define questions that they would like to ask the speaker. Despite the brain injury inhibiting his ability to remember a presentation, his ability to answer questions with meaning and power was inspiring. Too bad the conference designers were unable to let the whole audience benefit from the lessons he learned in life that brought him to that conference room.

Idea: Design keynote presentations to include 20 to 30 minutes for table or small group discussion on the key themes of the presentation. This will make the keynote more meaningful to your audience.

## How to use a great speaker poorly: American example

A large conference of 10,000 featured high profile keynote speakers. Liz Murray is a lovely young woman whose story is heartbreaking yet uplifting. She grew up in New York and ended up on the streets at 15 when her mother died. Sleeping on the subway and eating from dumpsters was about survival not education. She decided to find a high school that would accept her. Despite not having a regular place to sleep she finished high school in two years. She dreamed of university but that dream cost money. A teacher suggested a scholarship. Liz found one offered by the New York Times and applied. Her compelling story earned a scholarship to Harvard University. A movie was made about her life, “From Homeless to Harvard.”

Her message involved the theme of “What if...?” “When I was living on the streets, I asked myself, ‘what if’ I got accepted to high school, what would that make possible?” She wanted people to consider, “What are your ‘what if?’ challenges? What could be possible if you challenged yourself by asking, “what if?”

Her presentation ended. People left. I sat thinking... what if... we had time to consider where we could improve our lives right now? What if... thousands of people at this conference took the time to reflect and to act on one ‘what if?’ aspect of their lives?

The session could have included 15 minutes with this agenda:

- The MC thanks the speaker and explains her presentation is not yet finished. The MC asks if she could remain on stage.
- The MC reviews the presentation and reviews the “what if?” challenge. The MC rewords the challenge to encourage people to consider it in context of the conference.
- Some details on the large video screen help to clarify the instructions.
- The MC then encourages all people to reflect on this challenge for five minutes and perhaps talk it over with someone.
- After five minutes, the MC brings the attention and focus back to the stage.
- The speaker then delivers the true closing story of the keynote that prompts people to commit themselves to achieving their “what if” possibilities.

This brief addition would have added a great deal of meaning to the message of “what if?”

## CASE STUDY 5H

### Create your own Idea Factory on site

A number of years ago, the American Society for Association Executives' (ASAE) major yearly conference created an on-site creativity room (something like an idea factory). The room was designed for members who needed a timeout or who wanted to work on an idea or some plan of action from what they heard at the conference.

A sponsoring company provided some facilitators to work with members. Members could take advantage of the service and kick start a personal brainstorming session. The value of getting this type of attention for

20 minutes is tremendous to the individual's bottom line.

To make this work, tell your members that there is a place to develop ideas. Include some flipcharts and encourage people to use it. The more they use it, the more they will value the event. ASAE continues to use creativity rooms at its conferences.

Idea: create a room or space for people to step out of the conference briefly to work on an idea or to think about what they have already learned during the conference.

## CASE STUDY 5I

### Laser light shows do not make your event innovative

I spoke at a high-tech conference. As I was introduced, the lights went out and the music roared. A laser light bounced my name across the room along with the name of a sponsor. The lights stayed dim as I delivered a power point presentation to show off their latest technology. Was I impressed? Absolutely not.

It was too dark to see the audience, making it difficult to connect with people. It was also too dark for the

audience to capture any of the ideas I had to offer.

The seating was a throw back to their schools days.

The agenda allowed for no interaction or learning. The venue, meals, seating, lighting, music and the agenda were designed to sell the sponsor with little regard for the learning experience. If you simply want to impress sponsors, don't sacrifice your audience in the process.



## CASE STUDY 5J

### How not to involve your audience: Ineffective brainstorming processes

If you want to organize sessions for people to contribute their ideas, start with a proper and productive process to guide people through the exercise.

I attended an Innovation Summit in Australia and went to an important session on developing the right culture for innovation. So did 129 other people. Here's what happened:

- A university lecturer was chosen as facilitator,
- An assistant drafted some notes for the overhead projector (which allowed the large group to see the rough notes), and
- The process was for people to come to the microphone to raise ideas while the other 129 sat passively.

Some ideas were noted on the overhead projector. This lasted for over two hours.

In the end, the loudest voice won, not the best ideas. We agreed on some common ideas and actions. Most people saw the futility of brainstorming with 130 people with no process, tools or technology involved.

Like all brainstorming efforts, there must be a defined process that is used to take people from the introduction of the challenge, to discussions, to raising new ideas, and to gaining consensus. Many events use a process that is about control, often out of fear. The key is that participants must feel that it is their event. Facilitation is a support role, not a leadership role.

For all techniques, the bigger the group, the smaller the individual contribution. Ten people is the optimum number for a single focused conversation, discussion or brainstorming session. Any bigger, people start to lose their chance to voice their opinions. Luckily, most venues offer round dinner tables as an option for seating. These are ideal for discussion groups. A better process would have been to:

- ① Have people seated at round tables of 7 to 10 people.
- ② Introduce the challenge or problem that the session is designed to solve. When everyone is clear about the challenge (which should be written on page and distributed to all tables) – spend one-third of your time in these small group sessions discussing the challenge.
- ③ The second element is to have each table summarize their conclusions (in the form of ideas, issues or insights) and then prepare a brief summary for each table outlining their ideas. Each presentation must be set for no more 3 minutes. Each table should hand in a written summary of the ideas they present.
- ④ For the next section the MC should summarize the key points and bring the session to a conclusion. The result should be a page or two with 5 to 10 key ideas or points.
- ⑤ The final summary of the session should include a 'thank you' and an outline of what will happen with the results of the brainstorming session.

## The ‘Hypothetical’ Group Panels

About 1990, Australian Geoffrey Robertson started a television program called ‘Hypotheticals’. Each program hosted a panel discussion on meaningful topics to the viewers. The objective was to host a panel of experts that is structured in terms of answering questions specific to the person’s expertise. This model has been used by many conferences in Australia.

For example, I was on such a panel for a conference on entrepreneurship hosted by the Australian Stock Exchange.

The contribution that I was expected to make from The Idea Factory was to talk about ideas that people create to start a business. The host concluded my section with this comment: “Now that we have an idea for the business that seems sound, how do we take that idea and turn it into a business?” The next speaker talked about turning the idea into a business plan. Other speakers talked about protecting the idea legally, licensing or franchising the idea, financing the business, and then finally selling the business.

In terms of converting this to a conference setting, think of your stage as the set for a television program. The objective is to create an entertaining event that tests the knowledge of the speakers to come up with solutions on the challenges raised by the MC.

- For example, if the theme was to develop a coaching service for executives within an organization, the MC would define several scenarios that become the platform for a conversation.

- The MC could then ask specific speakers a question based on their expertise such as, “Let’s start with the situation of a company starting a new coaching program. What would you recommend for starting a pilot program?”
- With the discussion of this start up phase, the MC would then go to the next speaker and ask about turning the pilot into a full company-wide program.
- The MC could then move to a different scenario such as: “Let’s address the issue of coaching different types of people. Who benefits the most from coaching programs?”
- The final role for the MC is to summarize the many ideas and recommendations given by the panel and then to seek questions from the audience based on what they just heard. Often questions will be targeted at a specific panel member.

The MC must have a depth of knowledge of the subject and they must prepare a series of insightful questions that will lead to discussions that use the expertise of the panel.

The benefit of the Hypothetical is that it goes into depth. The traditional question and answer panel session leave the ‘questioning’ to the audience. The Hypothetical adds structure to the discussion and the result is often much more powerful.

## CASE STUDY 5L

### Extra involvement from a keynote speaker

A large association wanted to extend the value of an expensive keynote speaker. An idea was created to offer a conference prize that involved some personal coaching by this speaker. As such, three people were

selected for 15 minute coaching sessions. The speaker thought it was a great idea and did it for free. Note: this idea could be extended by auctioning these coaching sessions with the proceeds going to a cause.

### Tips for more effective conferences

#### Seating

Start with the basics. The least effective way for people to connect is sitting in long rows. Can your seating be altered to a herring bone? Many speakers prefer this and it allows people to look at each other. Ask the speakers what seating works best for their presentation. The good ones will know. Round tables are the most effective and efficient for people to reflect, discuss and manage their notes.

This may be impractical for large conferences but recognize that there is a cost to the degree of involvement and learning that will likely happen as a result.

#### Lighting and PowerPoint presentations

Drop computer presentations that require the room to be dimmed too much. There may be an issue with PowerPoint presentations or the giant video screens used to showcase a speaker.

Give your speakers an overview of what you expect from them. Professional speakers know how to use overheads (e.g. size of type, etc.) but many people do not. PowerPoint is only a problem when it is used badly. Great PowerPoint presentations add experience and perspective to a presentation.

One common concern is that too many events make the room so dark that it is impractical to

make meaningful notes. You will have to consider what is more important – a bright PowerPoint or video presentation or enough light to encourage people to make notes.

#### Use the venue creatively

Consider other aspects of your venue to add to the experience of participating in your conference. For example, does the venue have a view, a place for people to walk or other assets you could be using? Is there a view or can break-out workshops be planned in interesting places within the venue? Can you do something outside for variety?

Is your venue close to a museum, ocean, mountain or historical sight that could create an interesting experience for participants? People remember experiences when they are inspired!

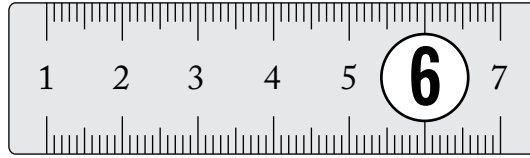
#### Incentives for ideas and insights

Can you add incentives for people to generate ideas? People love to be recognized and rewarded. Seek prizes from sponsors to reward people who find ideas at the event.

When participants are engaged in your event, everyone wins. An engaged audience knows how to respond to a speaker. Innovative thinking is not just a business function. The process of finding ideas that lead to opportunities applies equally to our personal lives.



# RULE



## put structure into your networking and mingling opportunities

Many conferences provide ad hoc opportunities for people to meet. However, is it good enough that people should meet by chance? You can create new alliances at numerous levels by starting with some objectives for your event. Why do you want people to meet? What do you want them to do when they meet?

For example:

- Do you want people to meet who have common problems or challenges?
- Do you want people to find common interests for potential collaborations or alliances?
- Do you want people to meet who can mentor or act as a sounding board in the future?

All of these add value and make your event more impactful. This is the best way to ensure that people come back to your event. Keep in mind that my research continually finds that most people go home with a pocket full of business cards from people they can't remember from the conference.

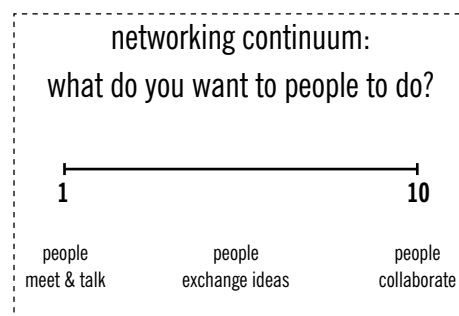
Many associations ask members what they want from a conference. A common finding is networking. This also applies to many corporate events that involve people from various offices, departments or regions. People want to meet other people who have common interests. There is a growing pool of research coming from the field of knowledge management that finds that the most innovative organizations are those in

which people are well-networked within the organization.

Conferences and meetings create the ideal opportunity for people to share ideas, insights, and stories across the organization or an industry. People who network learn from each other as well as from the “expert” speakers involved with conferences. Therefore, your events must include elements that allow people to talk and share their experiences and expertise.

### By design or by chance?

Everyone has a story to tell about someone they met at conference that ended up contributing to their success. What strikes me as odd is that so few events actually structure their networking. Surely the chance of meeting someone who can contribute to your success should not be left to chance, such as, who happens to be walking beside you en route to the washroom!



Networking is like brainstorming in which you connect various ideas which leads to new and more powerful ideas. Networking is connecting people together to see what happens! But brainstorming is a structured process to harness creativity. It's not random.

The goal for conference networking is to get people to talk in meaningful ways about issues that can contribute to their business and personal interest and success.

If you prefer, networking is also like a dating service. While it is nice to meet lots of people, whom you want to end up with is the "one" person who can contribute to your success. When planning an event, be creative and steal ideas from the many dating services that get people to meet.

*A reminder to your sponsors and suppliers!*

**Some conferences resemble a feeding frenzy of suppliers circling those delegates they see as prospects. I have seen salespeople quiz people about their potential as customers. If they don't meet their bottom line requirements, they can be almost rude in their treatment of people as they move on. Tell them to go easy! People go to an event to meet people, learn new things, and take home ideas. Many do not go to an event to be sold something. Remember that someone who is not a prospect can be someone who refers a sponsor to someone else.**

Networking is about making connections between people. The conferences that get remembered and valued will be those in which people continue to have conversations long after they have returned to work. Here are some ideas for structured networking defined in terms of prompting people to meet who can contribute to each other's success.

## 6.1 Meet & Greet

The easiest way to start is to have people introduce themselves to the neighbors at an opening session and exchange cards. This can be fun but it is random. At many events, people will sit with people they already know. It is a start, but at a

## 6.2 Find the Person

A fun game is to collect business cards from everyone at registration. At the first session, distribute cards at random to everyone. The goal is to find the owner of the business card by the end of the day. How? Networking. This works best for smaller events and it forces people to interact. You can encourage this by having people write a clue on the back of their card before they hand it in. You could also support the effort by offering prizes as incentives.

## 6.3 Themed Coffee Breaks

This is one of the best techniques I have seen to get people with a common interest to meet over the coffee break. Here's how to do it:

- Select a series of topics or themes related to your conference that would interest people (related to the event or the workshops and keynote presentations).
- Set up your space into 4, 6 or whatever number of topics or theme areas, each equipped with a flipchart. On each, write down one of the themes. Assign someone to lead an informal discussion around each theme. As such, people get their coffee, tea or juice, and move toward the theme that interests them.
- Spend 15 or 20 minutes hosting a conversation on this theme. Have people introduce themselves. Capture any interesting ideas and report back with any interesting results. People can be encouraged to continue

the conversation after the session or perhaps after the day.

This can be set up just prior to the break by the MC. Have them announce the session and provide a brief two minute overview of the concept. The leaders of each theme can be introduced or be given something quirky to wear so they stand out! It also makes it fun. It may be a traditional conference but your theme leaders can stand out. Remember Patch Adams? He opened the hearts of many patients by his wacky clothes.

You can enhance the potential for more themed networking by providing each leader with a pack of sticky colored “dots.” These can be distributed to all participants to put on their name tags. Then people see their color later in the conference and strike up a conversation.

#### **6.4 Table Experts Talk**

This idea of having table talk discussions is used by many events. This may be called “Meet the Pros” or “Meet the Experts.” Instead of a keynote speaker at lunch, define 20 or 30 topics or themes related to your event. The goal is to have a quality discussion about each topic. Use the table number stands hotels provide and insert a card with the table topic on it. People who want to talk about that topic will pick that table to sit at.

Assign “leading thinkers” to host a table lunch discussion for 8 to 10 guests. Some of your speakers may find this a great way to add more value to their contribution to your event.

Their job is to:

- Introduce themselves and the topic.
- Prompt people to do a “30 second introduction.” This can include why they are interested in this topic.
- The conversation can be started by a simple opening statement or a challenge. For example, “We all know that the changing regulations will create a change in how we do business.

Let’s have everyone suggest one idea how we can better manage this change and take advantage of it.”

- This can be made a bit more formal by organizing an idea swap. See 6.6 for details of a verbal approach and a written approach for swapping ideas.
- At the end of the lunch break, if the leader believes that a series of valuable ideas has been raised, they can offer to summarize the key ideas and email them to the participants. This is a great way to provide extra value from the event.

As people pick a topic they want, some tables will be more popular than others.

This approach allows people to talk, eat and listen to each other. This takes some work but the results can be great. A key to success is encouraging people to continue with these discussions afterward.

#### **6.5 E-mail eNetworking**

Getting a delegate list at a conference without being able to reach people defeats the purpose. One approach is to provide early registrants with a list of participants (via e-mail) with details of other participants. The point was to start discussions prior to the event and to arrange meetings. There are some issues of confidentiality here. However, it is a great way to enhance the value of the conference. Perhaps change this to a conference blog or discussion board prior to the event to build some buzz for your event.

#### **6.6 Running an IDEA SWAP at your table**

A good source of ideas and insights on a specific topic are other conference participants. You can organize idea swaps to have people exchange ideas either verbally or in a written format.

Both are useful and can create lots of great ideas. For either, your overall theme is Think Fast. If you want to provide ideas in writing, make sure

each table has some pads of paper (the hotel usually provides these anyway).

This is a great way to enhance relationships with people. When someone gives you an idea, the relationship changes for both people.

The rules for an idea swap are:

- The quantity of ideas is more important than quality. People should not fear that their ideas may seem silly.
- Have people defer judgment on any ideas until all ideas are raised.
- Word all ideas in a positive and enthusiastic way. The way to do this is to start with this phrase: “Wouldn’t it be great if you could solve the problem by...”

### **Written Idea Swaps**

To start, the leader serves as timekeeper for others to move the process along. This approach is designed to have all participants in a small group write out their ideas for each individual. In this way, everyone gets ideas from the group without worrying about recording the conversations. To start, have everyone write down one question or challenge that they face involving the topic. Write it in terms of: ...I am looking for ideas about...

- how to solve a problem...
- how to launch something new...
- how to manage something, etc.

Follow these steps:

- ① Make sure everyone has a pen and paper.
- ② Remind people of the rules of Idea Swaps.
- ③ Open the session by stating the overall theme. Give a brief background on the topic including some ideas you have already tried.
- ④ Start the first round by getting the first person to state their question or challenge to the group and ask for suggestions on that specific problem.

- ⑤ Everyone takes two minutes to write down as many ideas, suggestions or contacts as possible. Have people sign their page before they hand it in so you can follow up with them after the session for more specifics.
- ⑥ Collect all the pages but do not discuss or debate. Just collect the ideas and thank the participants.
- ⑦ The next person starts the second round by stating their question and asking for suggestions. Proceed until the entire group gets written ideas that respond to their question.

When everyone is finished, have all participants read their ideas and pick one or two that they think are really good. Make sure everyone can read the notes they have received before they go. You can open the discussion for those who are interested in staying longer.

### **Verbal Idea Swaps**

Follow the same basic steps as above but instead of having participants write out the answers, go around the group to get their ideas.

- ① Have one participant read out their question, problem or challenge.
- ② Have each person at the table respond with one or more ideas. Keep this short and to the point. The leader must ensure that each round lasts only 2 or 3 minutes.
- ③ Make note of the ideas that are raised for your question.
- ④ When the round is finished, the person who raised the question summarizes what they heard in one minute.
- ⑤ Continue with each person until everyone is finished.
- ⑥ Encourage people to record these great ideas right away while they are fresh.



Idea swaps are a great way for people to connect and collaborate. They are particularly useful at association conferences when someone's current problem or challenge is something someone else may have experienced in the past.

## 6.7 Networking for Partnering

A technical conference had a mix of researchers and corporate sector participants. It offered an interesting opportunity for academics looking for funding from the corporate sector to present a five minute overview of their idea for research.

The objective was to peak the interest of the corporate sector for a specific project. A page with the contact details of all presenters was given to the audience. People could follow up with the presenters at the conference or afterward. This was an ideal way to expose a lot of ideas to an audience. This same approach could be used by many associations:

- Members looking for someone to collaborate with on a project.
- Sponsors willing to sponsor specific types of activities could present the criteria they would use to judge projects.
- Members looking for volunteer advisors within the association to help with a challenge.
- A member with a specific or unique expertise could offer to assist others who need that expertise.

### *Remind People of the Networking Basics*

**Here are tips that can be used at the beginning of the conference to remind participants about the basics of networking. Have the MC or host present these in a fun way:**

- ① **Don't spend all your time with people you already know (say this one twice!!!)**
- ② **Scan the list of attendees and decide who you want to meet and why. If you don't know who you want to meet, think about it from a general perspective, perhaps someone with a certain type of experience or from a specific company.**
- ③ **Don't leave it to chance, make the connection. Leave a message to meet at a specific time and place.**
- ④ **Introduce yourself every time you sit down. Keep business cards handy and give them out generously.**
- ⑤ **Be a good contact and do what you promise. If you say you will send some information do it immediately.**
- ⑥ **Make a note as a follow-up plan and include a brief description of:**
  - **Who they are,**
  - **How you met, and**
  - **Your follow-up plan or actions.**



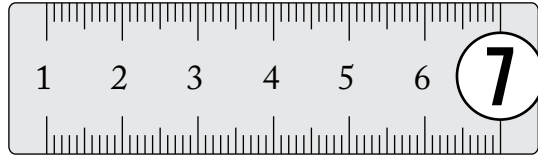
n o t e s

ideas to save  
quotes to remember



questions to ask  
actions to take

# RULE



## assume your conference participants have weak skills for participating in a conference

This may sound rather derogatory. After all we're in a knowledge economy and our events are full of educated and sophisticated people. However, if you ask a sample of your typical conference attendees the following questions, what conclusion would you come to?

Think about the last conference you attended...

- ① Did you make notes and ever look at them again?
- ② Did you put your conference binder on a bookshelf and ever take it off the bookshelf?
- ③ Did you go home with a pocket full of business cards from people you can't remember?

Experience suggests, once people stop laughing, about 50 to 70 percent of participants freely admit that they make notes and never look at them again. I have asked this of nurses, business executives, college professors, government employees and association members. It is clear that they can benefit from a review of their skills for participating in a conference. If people do not even look at their notes, the notion of measuring "return on investment" becomes meaningless.

Perhaps the most valuable insight for most people is that they think about how they participate in a conference. Most people say they never do.

Participants are the most important element of a conference as it would not happen with them. They have a role to play. This role requires that they are active during the conference in terms of:

- ① How they listen,
- ② How they make notes,
- ③ How and why they network, and
- ④ How they manage their ideas after the conference.

Conferences and workshops can be inspiring and informative. But ideas should not get lost, be forgotten or die. Consider for a moment the tools we give people to manage their ideas and knowledge:

- A blank pad of paper, often with hotel logos on it,
- A binder often filled with photocopied PowerPoint slides (or perhaps a CD Rom), and
- A bag filled with promotional materials.

One option to consider is a conference journal as people may perceive a great value to this. Another option is the use of the Conference

Navigator Guides as this provides each participant with a combined idea journal and innovative thinking guide in one. It includes many ideas for getting more value during the event and after the event.

What skills do conference participants need to effectively participate? Here are some suggestions:

- Making notes with meaning,
- Listening to speakers in ways that lead to ideas and insights,
- Knowing how to listen to different types of speakers,
- Picking workshops, ranging from those that are “need-to-know” to “nice-to-know”,
- Networking and making new contacts, and
- Turning their ideas into actions back at work in ways that make a difference.

## Conference training for your participants

Some conferences now open their events with a brief 10 to 15 minute “mini” keynote designed to prompt the audience to develop some of the following skills for being more effective participants. The objectives for your participants are twofold:

- ① Listen and participate more effectively to find more useful ideas at the conference.
- ② Act on these ideas after the event.

You can use some of the following points for the MC, president or host as lessons for your participants. A review of the basics works as effectively with CEOs as it does with line staff.

Parts of the following sections are written from the perspective of the individual conference participant. You can use some of these points to open your conference.

## How to be an Active Listener

You will do a lot of listening at this conference. It pays to sharpen your listening skills to insure you don't miss anything important. Here are some tips:

- Let go of assumptions and expectations. These limit what you are able to hear.
- Don't allow yourself to slip into a passive listening state. Refocus on the presentation.
- Block out distractions, those in the room or those in your mind.
- Stay focused even if the style of the presentation is very dry.
- Listen for the message.
- Stay engaged by taking notes and formulating questions.
- If an insight is triggered, write it down.
- Don't let information overload shut you down.
- Build in some quiet time between sessions.

## Tips for listening to different type of speakers

Keynote speakers are chosen because they have a message to offer an audience. The problem the conference industry has brought onto itself is that many conference participants are so familiar with inspirational and motivational speakers (those who tell a story of climbing to the heights of success and suggest listeners can achieve the same by following their formula for success), they don't know how to listen to other types of speakers. The reality is that the majority of speakers are not motivational speakers. They present content.

Speakers are selected for many reasons, most often as they have research, perspectives, ideas or insights that are important to the audience. In my coaching of conference audiences, I often explain it like this: Don't blame a dull speaker for the fact that you did not listen to their message. To criticize a speaker for being dull serves no purpose

(unless this was the motivational speaker). Encourage your audience to reflect on the issues of how they listen to different types of speakers. Some speakers introduce you to thinking that is completely new. Others cover ground that confirms what you already know. Each type of keynote presentation has its own unique challenges for listening.

{ quote }

**Participants must learn that they can't blame a dry or dull speaker for the fact that they did not listen!**

### **Suggest to your audience, if the speaker is:**

- ① **Inspirational:** Listen for good quotes and stories that motivate and entertain. Share these stories with others.
- ② **Leading edge:** Listen to everything as if it has value even if you want to disbelieve or discount the information. Be open to new ideas.
- ③ **Entertaining:** Listen to jokes and stories and enjoy them. Humor provides the playfulness needed for finding new ideas.
- ④ **Familiar:** Listen for things that confirm your experience and build confidence. Listen as if it is new to you and see what you can hear differently.

There is another category of speaker we most often hear at association conferences: the politicians. They may be government politicians or executive members of the association. Many people dread the annual general meetings and dry presentations of financial statements, yearly objectives and various reports. However these are important. Participants should be encourage to stay focused on the topic and recognize that many of these people are not professional speakers and they are doing what most people fear – speaking in front of an audience.

## **Where do great ideas come from?**

There are many sources of ideas at this conference. These include speakers, workshops and other participants. You may find a great idea and see how to apply it to your work right away. If so, be sure to get the information necessary to act on the idea. What does it take to make the idea work? What would cause it to fail? Brainstorm both sides of the idea.

Not all great ideas are handed to you ready to use. You may need to modify an idea to make it fit your circumstances. Be flexible in how you think about using an idea. You may change it in scope, or use only a part of it. In this way, you customize the idea so it becomes viable for your work.

### **Ultimately, you are the source of the great ideas you find at this conference**

Here is how it works...

- ① **Collect insights and thoughts that interest you.**  
Insights come from harnessing your intuition by taking the time to observe and understand. Insights attract your attention; they surprise you; they nudge you to pursue a topic further. These are the raw materials you need for ideas. Listen to your intuition.
- ② **Convert insights into ideas.**  
When you focus on an insight and work with it, you shape an idea. Combine several insights in new ways, and make connections. Play with insights until something clicks. Ideas are the result of forming, reforming and transforming insights.
- ③ **Capture your ideas.**  
You never know when an insight will suddenly transform into an idea. It's often when you least expect it – while in the shower, jogging, having a cup of coffee or in a dream. Ideas can be triggered by a comment you overhear or something you observe. Write down your ideas immediately. Really new ideas come and go in a flash.

n o t e s

ideas to save



questions to ask

actions to take

# putting it all together

## writing your learning strategy

The purpose of this book is to help you create a conference learning strategy and plan. This learning strategy may be a couple of pages in length. The plan is your conference agenda.

This final section provides many practical ideas to help you through process of writing the learning strategy in terms of:

- ① Putting together a team of people who work together to create the learning strategy and the overall plan or agenda for the conference.
- ② A process to help this team create the actual learning strategy and plan.
- ③ Templates to help write the strategy.

The process of working together is complex. Too often groups get side tracked from a focus on results because they do not talk about how they can work together. One writer calls this the act of “thinking about the thinking before thinking.” This is not about setting ground rules; it is about having conversations that will allow people to contribute their ideas and insights without having to feel that they have to fit in to the status quo of existing ideas.

### Create two planning groups: logistics and learning

Some events now use two planning groups. This can lead to a more effective conference if you pick the right people for both groups. For example, consider the type of thinking or problem solving that each has to do:

- ① Logistical management plans require people who are detail oriented, structured and disciplined in their ability to set timelines and achieve them. Efficiency drives the logistical planning process. These are the attributes that make for good conference planners. Experience and insight are crucial. Key responsibilities are planning, negotiating and decision making in the mechanics of the event.
- ② Learning plans require people who question and challenge, and who learn from past experience to see what worked, what didn't and what's possible. They need to borrow ideas from many sources and create some new ideas too. Learning takes people who are prepared to create and explore new options to find better ways to do something regardless of whether it has been tried before.

The difference is like that of architects and builders. Architects look at what is ‘today’s reality’ and search for ‘what is possible’ regardless if their clients can articulate what they need. Great architects take people to where they want to go even if they don’t know it yet. They create a vision. But an architect may be a poor builder and actually dislike the detail. Builders need the expertise to see the vision and then create it. When you select people for the conference, are they more like designers or more like planners?

Use these insights to allow people to work in a way that best uses their skills and their style of problem solving.

The first planning principle is to make a clear distinction between two important team concepts:

- ① The goal or *challenge* the group is to achieve: to create the strategy.
- ② The process the group will use to work together effectively to achieve this goal.

The challenge is clear: produce a learning strategy for the conference. Discussing the process helps people to contribute effectively. This leads to a better event and minimizes the conflict that may arise.

## 1. The learning strategy committee

Here are some perspectives to discuss during the first meeting. The aim is to create a climate that is welcoming and inviting for all participants.

- ① As a group have a conversation about people’s conference, training and educational experiences that may be useful to the group. What unique perspective does each person bring to the group? These may be from within the organization or from previous volunteer roles or past employment.
- ② Have each person talk about their experiences of working on highly effective teams. Ask, “What did these teams have in

common?” Notice the words people use. Often people use expressions like:



- People had respect for each others ideas.
- People were ready to hear what other people had to say.
- People were open and honest.
- People were allowed to bring different and unique ideas to the group without being criticized.

As a group, pick the most insightful words and use these as “team guidelines for working together.” Some people even create a poster version of these words as a reminder.

- ③ Recognize that people have different styles of problem solving and learning. Some people are very analytical in their approach and want to back up everything with research. Others are very original in their ideas and they are very comfortable recommending ideas that are original. Some people feel one or two good ideas is all that is necessary while others come up with a dozen ideas knowing that most will not be great. This reflects their personal style. One style is not better than the other.
- ④ Create an opportunity within the team for the “devil’s advocate.” One of the benefits of working with a diverse range of people who solve problems in different ways is that they will see the same issue differently. While this can be seen as a problem for group consensus, take the initiative to turn it into an opportunity to improve the quality of decisions your team makes. Agree upfront to test the quality of ideas that your group is creating by periodically stepping back to reflect on the work completed so far. The original concept for the devil’s advocate was for two people to switch sides of the debate.



For example, have the person who raised an idea with great enthusiasm take the opposite side: why might this idea not work? Often this leads to an even better solution.



**Sometimes people who seem negative or critical are those who see the implications of a decision before anyone else does. Treat this as an opportunity to gain a new insight rather than criticizing them as being a problem. Create a time for the 'devil's advocate.'**

## 2. The art of working together

Here is a process to start working together for your first meeting.

### ① Define the 'challenge' for your event.

Few people would leave for a wilderness trip without a map or compass to direct their travels. This is exactly what we often do when starting a team project.

By observing many groups starting the process of creating a new idea or strategy it's clear that many fail to achieve the quality of results that wanted. The reason seemed quite simple from the outside: they failed to define and agree on the 'challenge' they wanted to achieve. In other words, they are not focused in the same direction. Often mid way through the meeting or series of meetings people suddenly realize that they are solving a different problem. For example, some people invest their effort to look for new ideas for the conference while the chairman only wants to repeat the actions from the last event. The result is frustration and wasted effort.

Consider the original definition of brain storming from Alex Osborne's 1953 book, *Applied Imagination*. He talked about the process he created to "harness the brains to storm through a problem with each 'stormer' audaciously attacking the same creative problem, and doing so in commando fashion." What a wonderful definition! The key is to ensure that the entire group is heading in the same direction by attacking the same challenge. Therefore, your first exercise is to define the challenge for the group.

The way to start is a clear definition of the challenge for the group. It could be something like this:

*Our challenge is to create a learning strategy for our conference that enhances the overall conference experience for our members (or staff) by bringing together our members and a range of speakers and important ideas to enhance the success of their businesses after the conference.*

This type of definition helps set the parameters of your discussions. It suggests questions such as:

- What conference experience did people 'experience' in the past? What is enough?
- What do our members need to be more successful? Does this differ from other stakeholders?
- How would our members define 'value'?

You may also include some bullet points of the resources that you can work with. This may include the budget, the number of days for the events, the location, and so on. While this may seem like a great deal of effort it helps to shape a map and the direction you need to head toward.

## ② **Review your past conferences and state the obvious.**

Use feedback from previous conferences as a base. Every event gets some feedback from conference participants. Depending upon the questions, this may or may not be useful for designing the following year's strategy. Look for the insights that may be hidden in the feedback. For example:

- Do participants make notes and never look at them again?
- What do participants remember of the event six or nine months after the last conference? This is a very strong indicator of the value of previous events.
- Does anything stop people from acting on the ideas, insights or recommendations from previous conferences?
- What do people notice from attending this or other conferences?
- What types of speakers seem to work best and for what reasons?

Also get observations and insights from people who attended the event. Often what people remember months after a conference is a strong indication of the true value of the event. Ask:

- What did you like about the event?
- What did you not like about the event?
- What could we do better or differently?

You should be prepared to deal with the implications of this feedback.

## ③ **What are the 'defacto rules' of your conference?**

The term 'rules' is used in the context of defining the reasons why things happen the way they do. If your conference format is always the same, ask 'why?' When things happen for historical reasons, these become the defacto rules. Often they re ect

assumptions that were once made but few can remember. Why do things happen the way they do? For example:

- Why is there always an opening speech by the President or a keynote speaker?
- Are the main keynote speakers brought in for their celebrity or their knowledge and insight for the company or association? Why?
- Why is there an after dinner speaker? (or why isn't there an after dinner program?)

Start by writing down all of the standard elements of previous conferences and ask, "Why is it done this way?" If the answer is hard to find, it may be time for a change.

## ④ **Look beyond the obvious.**

Look to see what other events have done or what other forms of training may offer. A useful question is to ask is: What could we do if our budget was unlimited? This often leads to new ideas, many of which may not be costly if developed early. Often great ideas are free if designed into the system.

## ⑤ **Is your conference necessary for the success of the participants?**

This is a challenging question. Perhaps you could change this question to consider what would participants miss if they did not attend the previous conference?

You can view these insights from your observations and your research as the raw materials for your 'idea factory' meeting(s) that produce your learning strategy.

## **3. Using the tools to design your conference**

The tools that were introduced in Rule 4 come from the perspective of 'making the implicit 'explicit.' To review, this means making decisions that are obvious for all to see. This greatly

improves the quality of decisions that follow. Here is a review of the three tools.

- ① Use Tool One to set some targets and guidelines for selecting the format of your presentations.
- ② Use Tool Two to define the level of involvement you want from your participants. The degree of involvement will dictate the types of presentations and the number of presentations you offer.
- ③ Use Tool 3 to summarize all of the above discussions into a comprehensive resource for shaping the final conference. This involves the MPI research quoted at the beginning of this book. It offers a useful framework for prompting this discussion. To review, MPI research concluded with this statement:

“Meetings should be planned around clearly identified problems or issues with specific desired outcomes. These outcomes should dictate the form and process of the meeting. Meetings should be viewed as learning experiences designed to change the behavior of participants.”

As such, the first step in the process is for the learning group to take a look at the company, industry or association and make some decisions to address these three challenging questions. While developing the concepts for this book, a range of people tested the usefulness of the research from MPI and its implications for planning. In all cases, it prompted a discussion that led to conclusions such as ‘I never thought of it like that before.’

## What are the problems and issues important to the success of participants?

There may be legislative changes that will impact an industry or there could be the launch of a new product or strategy for a company. Look at the past year and then look forward over the following 12 and 24 months to see what will impact on participants. What do they need to know (or to do) to be successful?

### CASE STUDY

When the Ontario Soccer Association wanted to enhance the skills of its local club administrators (e.g., volunteers of numerous community soccer clubs) it decided a conference was a more effective tactic to inform and educate members than training. A study was undertaken to define the skills that were need for effective club management. This becomes the source of ideas for these types of workshops:

- PR for your club
- Computer registration to simplify your administration
- Selecting the accounting systems for your club

A special workshop was designed for club presidents to deal with the many issues of presiding over a local club. It was anticipated that this “President’s Forum” would encourage informal networks of local club presidents to form.

### What behaviors need to be changed?

This may reflect issues of staff being more customer-focused or association members be more skilled in their job. Often sales conferences are designed to prompt sales people to act in a new way or to use a new methodology.

#### CASE STUDY

A large Canadian Bank wanted to design a conference to reinforce its core values. Each value statement was developed like a mini conference to offer presentations and discussions to reinforce the behavior related to it. These were combined into an overall plan.

#### CASE STUDY

A large industrial company had a problem with the number of employees injured on the job. The company had invested heavily in proper equipment, safety training and many tools to reduce injuries but it did not help. Research found that employees were continuing to use risky methods as this is how they learned their job. A conference was designed on the theme of reducing injuries by improving decisions made on the job. A variety of highly interactive workshops were used to engage staff in conversations and decision making. In the process of these discussions many insights were raised and shared. In addition when people returned to the job many of these conversations continued with very positive results.

### What new knowledge do people need?

There could be new opportunities facing the industry or the association. This could lead to the need for a consultant or futurist to prompt a broad look at issues or a researcher to present the facts of an upcoming situation. Take a broad sweep over the landscape of the organization to see what may be possible.

#### CASE STUDY

A large sales organization knew that many of its traditional customers would be under stress over the coming year or two due to changes in its industry. This created a situation in which new opportunities could be created if sales people helped their customers through the transition. This would require a new way to deal with the issues facing customers.

## Creating your learning strategy

The actual document need only be a couple of pages. There is no format that fits all conferences. The format should include the following parts. Consider these to be the subtitles of learning strategy for your conference. The order that you complete these sections is less important than ensuring that all are completely by the end of planning work.

## 1. The objectives of the events

Start the conference objective with a statement such as: “Our conference is designed to achieve...” Later it may be useful to edit these objectives to reflect three key stakeholders:

- As conference designers, you are accountable to the association or the corporation for the investment necessary to make the event a success. The top level objectives must make sense to the CEO or directors who will eventually pay the bills.
- Conference participants should see a version of the objectives that will relate to them in terms of why it is important to attend your event (See Case Study 3B PTA for an example).
- Conference speakers should see a version of the learning objectives that they should use to guide their development of workshops and key note presentations. Even the high profile key note speakers should be instructed to focus their presentations on these objectives.

## 2. The overall statement of purpose for the conference

The Case Study 3A from the New Zealand Human Resource Institute conference is a good model to define the purpose of the conference. This will likely not be a group effort. Often a single individual who has an ability to write can be assigned to summarize the discussion and draft this statement. It may be only a few paragraphs in length but it provides the reason for the event, why the presentations and discussions will be important, and how participants will gain from being involved.

## 3. The theme of the event

Most often the theme captures the essence of the overall conference summary. It is not important which comes first: the theme or the statement of

purpose. The important aspect is that both are developed with the intention of setting the direction for all decisions for workshops, presentations and speakers. The theme is like a brand, it captures the imagination in just a few words. Most conferences are very good in taking the words and shaping them into visual logo. This helps your potential participants assess the value of the conference. Some examples are:

- New ways of working, thinking and leading
- Learning faster – working smarter
- Take the first steps on the path to success

The result of this planning effort will be a page or two that summarizes the conferences, the value it will create, and why it will be valuable for your participants.

With this strategy in place, the creative work now extends into making decisions on the specific agenda of the event.

### *Why use a learning strategy?*

**The learning strategy is the ideal selling tool for a range of stakeholders:**

- **The senior executives or decision makers will see why the event is necessary and why it will create value.**
- **Speakers will better understand the intent of the event.**
- **Participants will understand ‘what’s in it for me’ if I attend the conference. When people see value, they are likely to sign up for the event.**
- **If you are selling your conference to sponsors they will understand the event and the audience. A learning strategy is a good marketing tool for sponsorship sales.**



# 7

# rules for designing more innovative conferences

## learning strategy worksheets

The following pages are designed to help you create a learning strategy. Complete each section, but the order is not important. What is important is to review and reflect on each section until it creates the quality of event that will maximize your objectives. With this in place you can begin to design the actual plan or agenda.

## the overall statement of purpose for the conference

Create a vision for the conference by writing the words and sentences that provide the reason for the event, why the presentations and discussions will be important, and how participants will gain from being involved.

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## the theme of the event

The theme captures the essence of the overall conference. The theme is like a brand, it captures the imagination in just a few words. This helps your potential participants to assess the value of attending the conference.

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# what **drives** participation and **engagement** at your conference?



Look at the brochure or program from your last conference to determine the amount of time that was invested in the different types of presentations.

	Percent of your content as measured at past conferences	Target for future events
<p>1. What degree of your “content” is one way? <i>Your speakers as “experts” speak to the audience. The audience has one job: to sit and listen. This is most often as a keynote presentation and sometimes as a breakout workshop. It may be a motivational speaker or the president. The range of keynote speakers is very wide but the common element is that the audience is expected to sit passively and listen.</i></p>	%	40–60%
<p>2. What degree of your “content” is participatory? <i>To what degree do participants listen to the expert and then do something with the content such talk to a neighbor, ask questions or connect to their own experiences? This could be a keynote or a workshop designed for engagement. Not all workshops are participatory. Some are lectures, more like a keynote.</i></p>	%	25–50%
<p>3. What degree of the “content” is reversed? <i>To what degree does the focus change to the participants as “experts” who speak, lead or contribute to the content or presentations of the event? This could be question and answer session, Open Space Technology, brainstorming sessions, meet the pros sessions, or a presentation of ideas from the audience. These sessions are quite different to a typical workshop session.</i></p>	%	10–25%





# how much involvement do you want from your participants?

tool  
2

	<b>The Minimum Basics</b> One way communication	<b>Creating a learning event</b> Two way communication	<b>Active Participation</b> Participant driven conferences
Different levels of involvement that are possible at a conference	<ol style="list-style-type: none"> <li>1. People show up for the conference and its presentations.</li> <li>2. Speakers show up as well.</li> <li>3. People attend the sessions they book.</li> <li>4. People actually listen and hear what is presented.</li> </ol>	<ol style="list-style-type: none"> <li>5. People ask questions. They are curious and interested in the presentations and workshops.</li> <li>6. People listen, ask questions and make connections to find insights.</li> <li>7. People are presented with ideas at the conference from speakers, and various presentations that they work with.</li> <li>8. People find and capture the ideas that they see of value right away.</li> </ol>	<ol style="list-style-type: none"> <li>9. People contribute toward solving or defining some common challenges.</li> <li>10. People find ideas that they shape into personal or business opportunities at the conference.</li> <li>11. People find ideas and then create plans to launch them after the conference.</li> <li>12. People continue to act on ideas in the future.</li> <li>13. The event continues to engage people long after it is over.</li> </ol>
Potential strategies	<b>One way communication</b> creates awareness of key issues but you can't tell if the message stays with people.	<b>Two way communication</b> allows more knowledge to be created.	<b>Active participation:</b> new ideas and innovation are possible.
Types of activities:	Encourage keynote speakers to incorporate learning objectives. Add value by adding a few minutes for participants to reflect after each session. See Case Studies: 5F, 6A, 6B, 6C.	People start to find personal meaning in what they hear and experience. Use Rule 6 for networking ideas. See Case Studies: 1A, 5B, 5C, 5J, 5K, 6D, 6E.	People create something of value after attending the event. See Case Studies: 5A, 5D, 5E, 5G, 6F.
Your ideas:			





# enhancing the “learning objectives” of your conferences

Meeting Planners International studied the effectiveness of meetings and conferences and recommended three perspectives for making them more effective. These give you insights to enhance or improve the effectiveness of the conference.

MPI Research Recommends	Brainstorm the key implication of the research Finding..
<p>Meetings should be planned around clearly identified problems or issues with specific desired outcomes. These outcomes should dictate the form and process of the meeting or conference.</p>	<p><i>What are the specific issues, problems or challenges that the event is designed to achieve?</i></p>
<p>Meetings should be veived as learning experiences designed to change the behavior of attendees.</p>	<p><i>What behaviors are you looking to influence, change, promote or advance?</i></p>
<p>The agenda, pace of the meeting amount of content, delivery methods, and degree of relevance are critical factors that must be carefully planned.</p>	<p><i>What special features could be built into your event?</i></p>
<p>Therefore, what do you want people to do with the ideas and information they get at the conference? How does it contribute to their personal and business success?</p>	<p><i>How should they use their ideas in the future?</i></p>

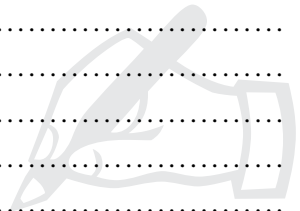




# defining the learning objectives of the conference

- ① Start your conference objectives with a statement such as: “Our conference is designed to achieve...”  
Edit these for your other stakeholders as well. Start with the objectives for CEO and directors who provide the investment necessary to make the event a reality. *Our conference is designed to achieve...*

1 .....  
.....  
2 .....  
.....  
3 .....  
.....



- ② Conference participants should see a version of the objective that will relate to them in terms of why it is important to attend your event. What will they learn, experience, gain, see, etc.? *By attending this conference, you will...*

1 .....  
.....  
2 .....  
.....  
3 .....  
.....

- ③ Conference speakers should receive a version of the learning objectives that they should use to guide their development of workshop and keynote presentations. Start with a statement such as: *We require speakers who can help our participants to...*

1 .....  
.....  
2 .....  
.....  
3 .....  
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# creating your conference plan

The previous pages will provide many ideas to shape the hour by hour planning necessary for the design of your conference. Use all of your ideas and the case studies in this book to design an event that engages people. You can use these templates to sketch out your initial ideas for shaping a average two day event. When your ideas are in place, you can make a more detailed agenda with objectives for each element of the program on your computer.

**any pre conference activities?**

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**post conference workshops, feedback research or follow up plans:**

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Time	Day One	Day Two
7:00		
8:00		
9:00		
10:00		
11:00		
12:00		
1:00		
2:00		
3:00		
4:00		
5:00		
6:00		
7:00		
Dinner Evening		



## CASE STUDY

### American Society of Association Executives “Great Ideas” conferences 2006

ASAE hosts Great Ideas conferences each year. It used the Conference Navigator Guides for 400 participants at each of its conferences in late 2005 and early 2006.

A brief introduction was provided by the chairperson of the conference who highlighted the importance of being an active participant in the conference.

Afterward on-line research was used to assess what people thought of the Conference Navigator Guides, whether people used them and whether people said their the use of the Navigator changed the way they participated in the conferences.

The results were impressive. They found:

- 86% said they would keep it for reference,
- 73% of people used the Conference Navigator Guides,
- 56% said the guides were either “very or extremely” important to their participation in the conference, and
- 46% said it influenced their participation in the conference.

It is very difficult to benchmark this performance. The comparison I can make is to the anecdotal comments I get from people when I open conferences to explain the Navigator Guide. When asked: **Do you attend conferences, make notes, and never look at them again?** about 60 to 70 percent of people freely put up their hand! Anything that takes people back to the notes, ideas and handouts is very positive.

It is also intriguing to consider that 46 percent said the Navigator Guide influenced their participation in the conference. If 46 percent of the 800 people act on one idea by using the navigator guide, imagine the value that is created if these 370 people act on one idea that benefits their association! Changing people’s behavior is a very complex issue. People need to want to change. They must see value in the change and they must see a direction or method to accomplish this change.

#### The Navigator Guides and a process

What most people see is a 60 page colorful journal. It fits comfortably in their hand with its size and textured paper. People will see blank note pages plus a range of editorial pages. What people don’t notice at first is that the guide summarizes a range of processes to help them get more from the event. These are processes for listening, making notes, and acting on their ideas.

As such, every conference that uses the Navigator Guides includes an opening session, much like a mini opening keynote to ensure that people use the Guides. Numerous conference MCs or association presidents have added some explanation for using the Guides to their opening remarks. Many are very insistent that the participants get more engaged in the conference.

The following overview is taken from a manual will you receive when you invest in the Guides.

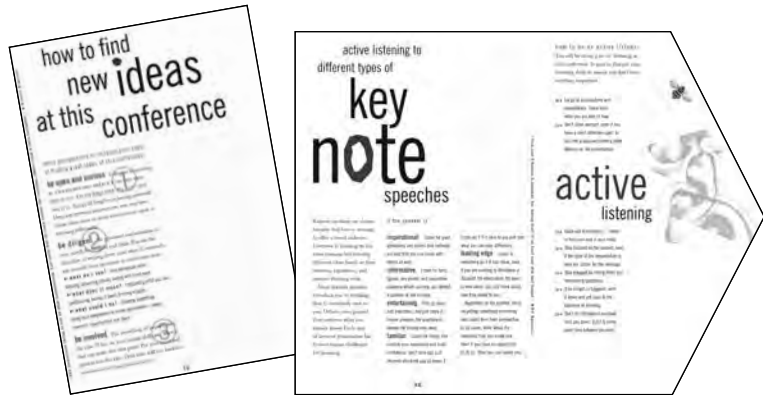
*continued on page 78*

# The Conference Navigator Guide is designed to help people get more value from a conference. It prompts people to think about how they will participate in the conference.

{ quote }

The originality, functionality and design of the Conference Navigator Guide leaves people saying, “Wow, this really is a great idea!”

The opening section includes interesting and informative pages to prompt people to set some objectives for the conference and to find more and bigger ideas. Some pages fold out to engage the reader.

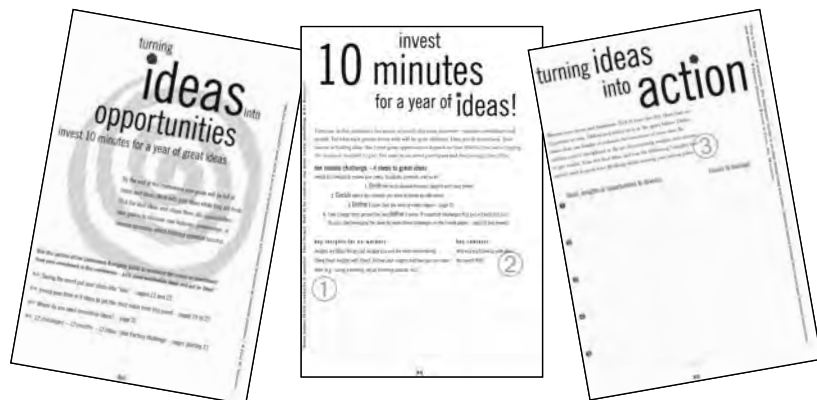


The middle section is a quality conference journal. It prompts people to go beyond simply summarizing what a speaker says. It suggests people listen for (and write down):

- Insights and ideas.
- Questions that come mind.
- Interesting and provocative quotations, facts and links to websites or references.
- Actions to be taken after the event.



The final section helps people manage their ideas after the conference. It includes this “10 minutes for a year of ideas” section to help people turn their conference ideas into opportunities and actions.



① **Present the Navigator Guides properly to delegates**

Plan to hand it separately to each delegate at registration. Prepare a script for the registration team to use when handing a copy to each participant... “Here is your Navigator Guide. It’s for your notes and ideas for the conference.”

② **Introduce it at the start of the conference**

Add a 10 minute overview of the importance of finding and acting on ideas at the beginning of your event. Tell people to write in the guides. Some think it is too nice to write. This gets the majority of people excited about the guide.

③ **Encourage its use throughout the conference**

Find opportunities to encourage the use of the Guide during the conference. Encourage the conference team to ask delegates about the use of the Guide during the conference.

### **What do conference participants say about the Navigator Guides?**

Research from conferences using the guides and measuring their results is consistent. Here are some of the highlights:

- *Inc.* Magazine conference group found that 82 percent of participants used the Navigator Guide with no prior awareness of the concept. This was an event of 800.
- The Project Management Institute of New Zealand achieved the same result: 80 percent of its 200 participants found the Guide useful in helping them achieve more from the event.
- The Canadian Society for Training and Development found that over 54 percent of its audience found the Navigator Guides to be “extremely” or “very” important to its conference and 28 percent found the guides to be “somewhat” important (conference of 450). The crucial result is that participants are

more willing and convinced of the need to follow up with their own ideas. The second year generated almost identical results.

#### **More general conclusions:**

- About 80 percent of most audiences will actively use the Guides if properly introduced. Often the remaining percentage is made up of suppliers or those who are simply not interested in the conference.
- Conferences with a large percentage of female participants will likely score even higher results. The design and the overall concept appeals to many women. One woman made notes on pad of paper which was positioned beside her Navigator Guide. She was questioned why she did so. She said, “It’s almost too nice to write in.”

#### **The most successful conferences are:**

- Leadership and management conferences,
- Staff conferences, and
- Association conferences.

The Navigator Guides are not recommended for:

- Technical or academic conferences in which the majority of presentations will be highly technical or research based.
- Sales incentive conferences which are primarily designed as an ‘incentive’ (a sales navigator guide will be launched to address the issue of helping sales people sell more effectively).
- Small meetings or conferences with less than 30 people.

### **Getting Sponsorship for the Navigator Guides**

Numerous associations have included the Navigator Guides in their sponsorship program.

While millions of dollars are spent on the sponsorship of conferences involving logos on

bags and banners, associating with speakers, or hosting receptions, the value of these sponsorships ends with the close of the event. The Navigator Guides offer a unique way to extend sponsorship benefits as they have take-home value. They extend the sponsorship past the traditional one or two day event. People often take the Guides to the next conference they attend!

## What can be sponsored or branded?

- The sponsor or conference logo can go on the front cover.
- The sponsor's message can go on the back cover.
- Extra pages can be created to be inserted into the beginning of the Guide.
- A pocket page can be used for computer disks, brochures or other property.
- Related workshops or presentations during the conference can be sponsored.

## Who has used the Conference Navigator Guides?

Here are some of the organizations that have used Navigator Guides:

Advocis Canada  
AIM Trimark  
American Society of Association Executives,  
Great Ideas Conferences  
BC Credit Union Human Resources and  
Training Professionals  
Canada Mortgage and Housing Corporation  
Canada Post  
Canadian Association of Professional Speakers  
Canadian Centre for Management Development  
Canadian Society for Training and Development  
CIBC Canadian Imperial Bank of Commerce  
Clinical Laboratory Management Association  
– USA  
Financial Planners Association of Australia  
Hospice Association of Ontario

### *Why is conference navigating important?*

Once in a while a new idea surfaces that makes me wonder, "Why didn't I think of that?" That's precisely the effect you have had on me.

I just wanted to take a moment to let you know in a more formal way just how excited I am about your Conference Navigator, Wow! That's a Great Idea! As you know, the word of mouth response from people who have seen and used it has been extraordinary. That is hardly surprising because of the superb execution. From my perspective everything about it is inspired, from the format and design to the overall organization and page-by-page execution.

In the past 10 years we've moved from a period where there were simply too few new original ideas about managing and leading our organizations, to where there are too many. As we've said in Inc. Magazine many times before, this is the age of execution. From this perspective, the Conference Navigator is an idea whose time has come helping people bridge the crucial gap between inspiration and execution.

GEORGE GENDRON,  
EDITOR-IN-CHIEF, INC. MAGAZINE

### *Human Resources Institute of New Zealand*

The HRINZ has used Conference Navigator Guides for five years in a row:

Many thanks for speaking at our conference. The audience loved your session and the feedback about the Conference Guides was excellent. You're obviously onto a winner and we're keen to look at using them again. I've never received such unsolicited praise from HR people before. It was great to finally meet you. Thanks again for your support and time.

BEVERLY MAIN (CEO)



Human Resource Institute of New Zealand  
 Inc. Magazine  
 Independent Meeting Planners Association  
 of Canada  
 International Association of Business  
 Communicators  
 International Association of Conference Centers  
 Meetings Industry Association of Australia  
 National Truck Stop Owners Association – USA  
 New Zealand Project Management Institute  
 Parent Teachers Association (PTA) – USA  
 Saskatchewan Water Authority  
 Society of Human Resource Management  
 University of Saskatchewan Executives Programs  
 Washington Bankers Association  
 Washington Society of Association Executives

## How to order Conference Navigators

The Conference Navigator Guide concept has been used by many events in a variety of formats. There are two basic formats:

- ① *Conference Navigator Guide* – this is a standard version of 60-pages that is a total package of tools and ideas for your participants. This is suitable for any type of management conference.
- ② *Conference Navigator Journal* – this version has less editorial content. It is a basic conference idea journal. It retains the look and feel of the navigator guide. This is suitable for small events or those events which are more motivational or incentive in nature.

Both versions can be customized with the branding of an event or of a sponsor. You can also have extra pages added to the navigator in terms of:

- Welcoming letters,
- Workshop pages specific to your event, and
- Association challenges or objectives.

A minimum number for the non customized version is 100 for the journal and 100 for the guide. Customized versions incur the extra production costs and generally involve events of 500 or more. For events of 1000 or more, contact the Idea Factory to discuss a wider range of ways to customize the navigator concept for your events.

## Licensing and Custom Design Navigator Guides

Associations or Corporations can also consider licensing the concept from The Idea Factory. A total conference learning strategy can be created to develop a range of options for numerous events.

The Idea Factory has also partnered with organizations to use its expertise in creating unique publications for different audiences:

- Engage Selling partnered with the Idea Factory to create “Selling Innovation,” a sales training navigator for its programs. [www.engageselling.com](http://www.engageselling.com)
- Public Works and Government Services Canada: a participant in a conference mused that the Navigator Guide would make an engaging staff employment manual. The Idea Factory worked with this Government Department to create a publication that included entitlements and employment programs, along with an idea journal.
- The Idea Factory partnered with a large Canadian bank to create a Navigator Guide for a series of 30 senior executives workshops organized across the country.

Contact Ed Bernacki for more information [info@wowgreatidea.com](mailto:info@wowgreatidea.com)

# about the conference navigator guides



a great idea to help participants at conferences

{ quote }

**“Once in a while a new idea surfaces that makes me wonder...Why didn't I think of that?” George Gendron, former editor-in-chief, Inc. Magazine wrote this about the Conference Navigator Guides**

With millions of dollars being spent to attract participants to thousands of conferences every year and millions more being spent on the elements of a successful event such as speakers, entertainment, hotels and food, what is invested in making participants more effective?

Despite the sophistication of conference management, one facet seems overlooked: participants use of ideas and information.

While this book is designed to make conferences more effective, the Idea Factory co-created a process and a guide to make conference participants more effective. The idea started with a challenge to find a way to prompt conferences participants to act on their ideas after the conference. This led to the creation of the Conference Navigator Guide, a fun yet serious “idea” journal designed to:

- ① Help people find more ideas and find better ideas.
- ② Prompt people to act on these ideas.

- ③ Enhance the image of the host organization in the process.

*Steno pad on steroids*

**After the first conference to use the Conference Navigator Guides, Professional Speaker Rebecca Morgan CSP, wrote: “We were all given this very cool, spiral-bound, steno-sized conference notebook. It is like none other that I've seen before, very innovative, engaging, creative – a kind of steno pad on steroids!”**

To change the way people participate in a conference dictates that you hit them between the eyes with a great new concept. One conference participant said, “The Navigator Guide forced me to be accountable for what I got from the conference. I could not blame the speakers or the event if I did not listen and take notes properly.”

The Conference Navigator Guides are designed for those events in which one of the learning objectives involves people taking on new ideas and using them after the event. There are now a range of different navigator guides to fit different types of events.

## Conference Information and Contacts

To order extra copies of this book please visit [www.innovativeconferences.com](http://www.innovativeconferences.com)

To arrange for presentations or brainstorming ‘idea factory’ workshops to help you shape the learning strategy of your events, contact Ed Bernacki at [info@wowgreatidea.com](mailto:info@wowgreatidea.com)

For large orders or customized versions please email [info@wowgreatidea.com](mailto:info@wowgreatidea.com)

For information on the Conference Navigator Guides contact the Idea Factory [info@wowgreatidea.com](mailto:info@wowgreatidea.com)

If you have interesting case studies of the ways people and content were put together, please email them for future revised versions of this book.

### Source of Meetings Industry News

MPI [www.mpiweb.org](http://www.mpiweb.org)

Independent Meeting Planners Association of Canada [www.impaccanada.com](http://www.impaccanada.com)

Meetings & Events Australia (MEA) [www.meetingsevents.com.au](http://www.meetingsevents.com.au)

### Source of speakers

The Canadian Association of Professional Speakers and the affiliated groups around the world are an ideal source of speakers on a wide variety of topics. Each website has a search function to find speakers specific to a topic or to a local community. Often great quality speakers can be found in the community.

- Canada [www.canadianspeakers.org](http://www.canadianspeakers.org)
- United States [www.nspeaker.org](http://www.nspeaker.org)
- Australia [www.nationalspeakers.asn.au](http://www.nationalspeakers.asn.au)
- New Zealand [www.nationalspeakers.org.nz](http://www.nationalspeakers.org.nz)
- UK and Europe [www.professionalspeakers.org](http://www.professionalspeakers.org)
- Singapore [www.asiaspeakers.org](http://www.asiaspeakers.org)

## CASE STUDY 5J

The concept of creating a “hypothetical” is an excellent conference tool but rarely if ever used in North America. For more information on this fascinating way to present a panel discussion, see website for professional speaker Simon Tupman.

See link at [www.simontupman.com](http://www.simontupman.com)

### Conference Venue or Hotel?

Consider venues from members of the International Association of Conference Centers. To belong means the facility had to quality on criteria to make conferences more effective and productive. Not enough venues focus on the needs of the conference beyond supplying meals and beds. Support IACC venues.

- [www.iaccnorthamerica.org](http://www.iaccnorthamerica.org)
- [www.iaccaustralia.org](http://www.iaccaustralia.org)

### Conference presentation or ‘business simulation’?

A growing number of events are engaging people in a way beyond individual speakers and workshops. They involve companies who specialize in business simulations that engage people through their minds and hearts. Many of these are suitable for large groups and corporate events. The focus can be innovation, sales, team building, and so on. For more information on business simulations, contact Don Jones, President of Experience It at [jump@experienceit.com](mailto:jump@experienceit.com) or see [www.experienceit.com](http://www.experienceit.com)



# rules for designing more innovative conferences

## learning strategy worksheets

The following pages are designed to help you create a learning strategy. Complete each section, but the order is not important. What is important is to review and reflect on each section until it creates the quality of event that will maximize your objectives. With this in place you can begin to design the actual plan or agenda.

### the overall statement of purpose for the conference

Create a vision for the conference by writing the words and sentences that provide the reason for the event, why the presentations and discussions will be important, and how participants will gain from being involved.

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### the theme of the event

The theme captures the essence of the overall conference. The theme is like a brand, it captures the imagination in just a few words. This helps your potential participants to assess the value of attending the conference.

.....  
.....  
.....

# what **drives** participation and **engagement** at your conference?



tool  
1

Look at the brochure or program from your last conference to determine the amount of time that was invested in the different types of presentations.

	Percent of your content as measured at past conferences	Target for future events
<p>1. What degree of your “content” is one way? <i>Your speakers as “experts” speak to the audience. The audience has one job: to sit and listen. This is most often as a keynote presentation and sometimes as a breakout workshop. It may be a motivational speaker or the president. The range of keynote speakers is very wide but the common element is that the audience is expected to sit passively and listen.</i></p>	%	40–60%
<p>2. What degree of your “content” is participatory? <i>To what degree do participants listen to the expert and then do something with the content such talk to a neighbor, ask questions or connect to their own experiences? This could be a keynote or a workshop designed for engagement. Not all workshops are participatory. Some are lectures, more like a keynote.</i></p>	%	25–50%
<p>3. What degree of the “content” is reversed? <i>To what degree does the focus change to the participants as “experts” who speak, lead or contribute to the content or presentations of the event? This could be question and answer sessions, Open Space Technology, brainstorming sessions, meet the pros sessions, or a presentation of ideas from the audience. These sessions are quite different to a typical workshop session.</i></p>	%	10–25%

# how much involvement do you want from your participants?



	<b>The Minimum Basics</b> One way communication	<b>Creating a learning event</b> Two way communication	<b>Active Participation</b> Participant driven conferences
Different levels of involvement that are possible at a conference	<ol style="list-style-type: none"> <li>1. People show up for the conference and its presentations.</li> <li>2. Speakers show up as well.</li> <li>3. People attend the sessions they book.</li> <li>4. People actually listen and hear what is presented.</li> </ol>	<ol style="list-style-type: none"> <li>5. People ask questions. They are curious and interested in the presentations and workshops.</li> <li>6. People listen, ask questions and make connections to find insights.</li> <li>7. People are presented with ideas at the conference from speakers, and various presentations that they work with.</li> <li>8. People find and capture the ideas that they see of value right away.</li> </ol>	<ol style="list-style-type: none"> <li>9. People contribute toward solving or defining some common challenges.</li> <li>10. People find ideas that they shape into personal or business opportunities at the conference.</li> <li>11. People find ideas and then create plans to launch them after the conference.</li> <li>12. People continue to act on ideas in the future.</li> <li>13. The event continues to engage people long after it is over.</li> </ol>
Potential strategies	<b>One way communication</b> creates awareness of key issues but you can't tell if the message stays with people.	<b>Two way communication</b> allows more knowledge to be created.	<b>Active participation:</b> new ideas and innovation are possible.
Types of activities:	Encourage keynote speakers to incorporate learning objectives. Add value by adding a few minutes for participants to reflect after each session. See Case Studies: 5F, 6A, 6B, 6C.	People start to find personal meaning in what they hear and experience. Use Rule 6 for networking ideas. See Case Studies: 1A, 5B, 5C, 5J, 5K, 6D, 6E.	People create something of value after attending the event. See Case Studies: 5A, 5D, 5E, 5G, 6F.
Your ideas:			





tool  
3

## enhancing the “learning objectives” of your conferences

Meeting Planners International studied the effectiveness of meetings and conferences and recommended three perspectives for making them more effective. These give you insights to enhance or improve the effectiveness of the conference.

MPI Research Recommends	Brainstorm the key implication of the research Finding..
<p>Meetings should be planned around clearly identified problems or issues with specific desired outcomes. These outcomes should dictate the form and process of the meeting or conference.</p>	<p><i>What are the specific issues, problems or challenges that the event is designed to achieve?</i></p>
<p>Meetings should be veiwed as learning experiences designed to change the behavior of attendees.</p>	<p><i>What behaviors are you looking to influence, change, promote or advance?</i></p>
<p>The agenda, pace of the meeting amount of content, delivery methods, and degree of relevance are critical factors that must be carefully planned.</p>	<p><i>What special features could be built into your event?</i></p>
<p>Therefore, what do you want people to do with the ideas and information they get at the conference? How does it contribute to their personal and business success?</p>	<p><i>How should they use their ideas in the future?</i></p>



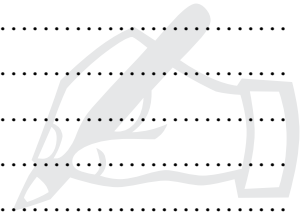
# defining the learning objectives of the conference

- ① Start your conference objectives with a statement such as: “Our conference is designed to achieve...”  
Edit these for your other stakeholders as well. Start with the objectives for CEO and directors who provide the investment necessary to make the event a reality. *Our conference is designed to achieve...*

1 .....

2 .....

3 .....



- ② Conference participants should see a version of the objective that will relate to them in terms of why it is important to attend your event. What will they learn, experience, gain, see, etc.? *By attending this conference, you will...*

1 .....

2 .....

3 .....

- ③ Conference speakers should receive a version of the learning objectives that they should use to guide their development of workshop and keynote presentations. Start with a statement such as: *We require speakers who can help our participants to...*

1 .....

2 .....

3 .....



# creating your conference plan

The previous pages will provide many ideas to shape the hour by hour planning necessary for the design of your conference. Use all of your ideas and the case studies in this book to design an event that engages people. You can use these templates to sketch out your initial ideas for shaping a average two day event. When your ideas are in place, you can make a more detailed agenda with objectives for each element of the program on your computer.

**any pre conference activities?**

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**post conference workshops, feedback research or follow up plans:**

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Time	Day One	Day Two
7:00		
8:00		
9:00		
10:00		
11:00		
12:00		
1:00		
2:00		
3:00		
4:00		
5:00		
6:00		
7:00		
Dinner Evening		