COURAGEOUS
COLLABORATION
The important values and critical mechanics
in creating collaborative workspaces

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Executive Summary

Exhaustive research has proven that effective collaboration offers significant benefits to an organization. Collaborative cultures experience an increase in organizational competitiveness and an improved ability to respond, improved financial performance, higher levels of innovation and product quality, and increased satisfaction amongst employees. [1] However, most organizations merely give lip-service to creating a culture of collaboration. Perhaps even more concerning is that organizations fail miserably when attempting to structure a collaborative gathering. [2]

Having facilitated thousands of meetings, pitches, workshops, training seminars, and executive strategy discussions throughout my professional life, I have come to important conclusions about how to foster effective collaboration. My research has been both academic - with my favorite articles at the bottom of this paper for your reference - and observational, based on my experiences consulting for forty percent of the Fortune 100.

This paper seeks to outline recommendations for the effective facilitation of collaborative meetings as a basis for the evolution of a more dynamic, innovative and creative organizational culture.

Collaborative Meetings as a Basis for Cultural Change

The ability, or willingness, to collaborate within an organization is directly affected by company culture. By making the decision to improve the way your organization collaborates, you have effectively decided to enforce a shift in the organization's culture – not an easy task. In fact, such a challenge can be compared with attempting to boil the ocean itself. However, there is a very effective place to begin this transformation using grassroots tactics - and the front line is your meeting room.

There are over 5,000 books available on Amazon that pontificate on the virtues and practices of running effective meetings. However, of the hundreds that I have read, none of them adequately and concisely describe the essential ingredients to running a meeting focused on collaboration.

Courageous Collaboration

Without a considered respect for good meeting values, and the important mechanics of managing a meeting, your meetings are destined to produce one of three results:

a) feed the facilitator's ego,
b) allow your team to feel "busy" while not accomplishing anything, or
c) frustrate everyone that attends.

There is a fourth type, which is a grand combination of all three. Unfortunately, I've been guilty of running some of these meetings but, over time, I've come to recognize the commonalities in values and mechanics that every great collaborative meeting shares. These are:

Values: the people attending your meetings must:
- commit to showing respect for other ways of thinking and doing;
- assume good intentions;
- leave their personal baggage at the door;
- agree that success is not always compatible with comfort;
- understand that alignment is valued over consensus.

Mechanics: the properties that are critical to your meeting are that:
- the team commits to being physically present;
- meeting objectives are clearly defined;
- there is enough time allocated to accomplish the objectives;
- team members are required to work both independently and as a group;
- the facilitator is focused entirely on creating team-defined outcomes.

Most importantly, the core trait that all great facilitators have is the quiet courage to persevere in their quest for positive outcomes in spite of the team's personalities, history, anxiety, and objections to change.

Collaborative Values

It should be understood that not everyone is collaborative and, in my experience, a collaborative attitude cannot be taught. However, those people who do not value collaboration may still have a very positive impact within your business. In fact, many of the most talented practitioners I have worked with have been passionate individualists, single-minded about how things should be done and unwilling to discuss it in an open debate.

Although valuable for getting things done, such non-collaborators absolutely do not belong in collaborative meetings. The people you invite to meetings must all agree to certain values before the discussion begins. I have gone so far as to outline the necessary values in the meeting invite with the stipulation that accepting the invitation is also an agreement to adhere to the values laid out. Eventually your group will come to understand that this is "how things are done around here" – stage one of a bottom-up, grassroots change.

Value #1: Be Open to Other Ways of Thinking and Doing

Within a meeting setting, dominant personalities – the extroverts – will often have the most to say. However, if these personalities are permitted to dominate the discussion, some of the best ideas and suggestions can be left unsaid.

Almost without fail, it is the extrovert executives who excel at creating a vision and leading the charge, whilst more introverted practitioners – the 'grassroots' individuals familiar with the day-to-day procedures on the 'shop floor' - are the best at making ground-level correlations and coming up with the ideas that solve execution problems.

In a collaborative meeting, both perspectives are required and are of equal value. In order for the meeting to produce any viable fruit, each of these perspectives must value the other's contribution. Extrovert / Introvert pairings - "marketer" (extrovert) and "engineer" (introvert), for example, or doctor and nurse, designer and developer, entrepreneur and academic - can be found in almost every business setting. When trying to

discover and explore new opportunities or solve difficult problems, all points of view have something valuable to offer and must be given the opportunity to speak.

Overcoming the imbalance of contribution within these two groups is addressed later on.

Value #2: Assume Good Intentions

Responding well to negative input is one of the important factors that drives growth. In a successful collaborative meeting, participants ask themselves what can be learnt from a negative comment rather than becoming upset. In other words, they assume that the intention behind the comment is good.[3]

There is a flip-side to this value that is equally important: comments must be constructive and intended to progress the meeting's objectives. Personal attacks cannot be allowed. I have witnessed all of these words flung in anger at others in group settings: stupid, unethical, clueless, ignorant, cowardly, lazy, ugly, jerk, idiot, liar, bad smelling, STD-carrying, and old-grandpa. Nobody should ever attack another's character or intellect; my own employees have been terminated without prejudice for initiating such attacks. Challenging someone's intentions can be tolerated, but leveling insults to further a point are not acceptable within a space designed to foster creative thinking.

Value #3: Leave Your Baggage at The Door

One of the biggest dangers to collaborative thinking is when one or more attendees bring their personal issues into the room. Typically, these issues manifest as someone acting out the role of victim, villain, or hero. The victim is the "poor me" attitude brought into meetings; the villain points outwardly and blames others for the way things are; and the hero manipulates the situation by offering to shoulder the entire burden and carry everyone out of the current mess. [4]

For astute facilitators, these attitudes are indicators of fear, anger and anxiety from a potentially toxic team member and can be managed as such, but they have no place in a collaborative setting. Each participant must identify these traits or tendencies within themselves and consciously choose to leave them outside.

Value #4: Be Willing to Get Uncomfortable

Fredrick Douglass is a prominent African-American abolitionist. The social reform he championed only came after he fought for his own freedom in the late 1800s. In one of his most distinguished writings, he penned:

"If There Is No Struggle, There Is No Progress"

Although this example may seem a touch dramatic to scratch out on the whiteboard, it perfectly illustrates the most daunting issue facing organizations that desire change: change inevitably leads to conflict and struggle. It means people's routines are upended and that there are hard conversations to be had. It may mean risking customer relationships or losing valuable employees. It requires asking difficult questions, like "what is the risk of doing nothing" or "what if our competition does this instead?"

In a collaborative meeting, participants need to be emotionally prepared for potentially uncomfortable what-if scenarios and tough questions. I have seen very healthy teams yell in meetings because the changes suggested were going to cause pain. At the end of the decision making process, the same people were hugging one another because they all understood how meeting dynamics work. They understood not to take things too personally, and that struggle is necessary for things to progress. [5]

Value #5 Alignment is Required; Consensus is Not

You may wonder about the difference between consensus and alignment. Consensus is when a majority of a team agrees that a given decision is the right one; alignment is when the entire team agrees to stand behind a decision, even in circumstances where they may not agree.

Ideally, the individuals who are invited to meetings will add value. However, a disastrous side-effect of collaborative meetings is the false expectation that an individual's input is not only valuable, but that it will dramatically influence meeting outcomes. Most people believe they should have a "vote" to help decide what should be done but the data proves otherwise. Consensus-led organizations are generally ineffective and almost never leaders in their industry. [6]

Properly-aligned organizations are, almost by definition, innovative, progressive, and healthy. Aligned organizations do worry about making the right decision, but they are more concerned about getting behind the decisions that have been made. [7]

By far, the best quote on the subject comes from Dr. Phil McGraw:

> *"Sometimes you make the right decision,*
> *sometimes you make the decision right."*

I'In other words, once a decision has been made, all parties treat the decision as the correct one and support it as such. Otherwise every decision will be a disastrous waste of time and resources.

An important side-note on alignment: if you find yourself asked to align yourself with issues in conflict with your core personal values, you should respectfully leave the organization. Neither you nor the company will see long-term value from your attendance should you try to "stick-it-out".

The Mechanics of Collaboration

Without the right values, your meetings will be a frustrating failure. However, the mechanics of the meeting may be even more important. The proper meeting structure is critical to achieving an effective outcome and alignment with the decisions that are made. These are the rules that I insist upon for anyone facilitating an important collaborative meeting:

Rule #1: Show Up in Person

The fashionable belief that organizations can foster a collaborative culture by leveraging a completely distributed workforce has been debunked. Even the most advanced tech companies in the world are now bringing their employees back in to the office. When given the opportunity to deal with colleagues in person rather than remotely, 92% of employees believe collaboration is dramatically improved and 82% feel it is easier to make themselves understood. [8]

It is possible to have effective meetings remotely - status meetings or project updates, for example, work just fine - but for the meetings where you need a group of people to challenge the status quo, you need everybody in the room. The meeting works because everyone is able to look in each other's eyes, see facial expressions, read body language, and draw together on the whiteboard. You need to enable quick sideline conversations and dynamically change who's talking to whom. Successful collaboration requires bodies and minds completely absorbed in the same creative space. There is just no substitute for in-person communication when creative brainstorming is required.

Rule #2: The Facilitator Must Clearly State Measurable Objectives
Which one of these meeting objectives is meaningful to you?

Discuss our process problems and identify solutions
> -or-

Process improvement committee meeting
> -or-

We are going to identify ways to reduce process errors by 25%

We've all been to the first two meetings, over and over again. They result in great conversation (maybe) and a touch of action (usually not) but the third objective demonstrates how all your collaborative meetings should be set-up. A clear and measurable objective should be stated in the title of the meeting invite.

Here's the rub: a clear meeting invite stating an objective and measurable goals will almost always cause turmoil before the meeting ever begins.

> "Wait, why is Cindy calling this meeting? She's not even in project management."
> "Our process is fine; we don't even need to discuss this."
> "We don't currently measure process errors. How can we reduce something we don't measure?"
> "Doesn't Tanya already have a group working on this?"
> "Shouldn't we invite Ankit to this meeting as well?"

These types of questions arise even if you've already agreed to the meeting with all the attendees, and that's how it should be. It is inevitable that team members will want to argue over what the objective should be; who should be there; if this is a really a problem; if your measurements are accurate; and if this is a valuable use of their time. Rather than allowing these objections to pop up during the actual meeting, where the meeting's positive, can-do energy will be irreparably diminished, you want these objections to come out well in advance. As a result, when the meeting begins, you can get right to the business of brainstorming the moment everyone has arrived.

Rule #3: Allocate Enough Time

This rule runs in direct opposition to the in-vogue trend of keeping meetings short and small. Don't listen to those meeting naysayers; not all problems can be identified, creatively solved, and tasked using 3 people and 20 minutes. Give your team a luxurious amount of time to brainstorm, particularly when you are trying out your new-found meeting facilitation skills. Creative thinking is never done well when it is overly rigid or structured (although it is also not done well when there are no constraints at all.) This approach may sound too costly, but time wasted on failed collaborative meetings is an even greater loss. Unless you're a creative agency or a technical consultancy, collaborative meetings are rarely a weekly or even monthly occurrence anyhow, so allowing 25% or even 100% more time than you think is required is not as great an expense as you may suppose.

An agenda framework for a collaborative meeting may look like this:

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 5 minutes: The problem/ opportunity: why attendees should participate
 5 minutes: Identifying the objective and how it is to be measured
 5 minutes: Stating meeting values
10 minutes: Status updates from relevant people (data, summary of important issues)
10 minutes: Individual reflection on possible solutions
20 minutes: Open discussion about potential solutions
10 minutes: Individual refining of solutions
20 minutes: Open debate
10 minutes: Decide which actions are to be taken
10 minutes: Assign owner(s)
10 minutes: Define how progress will be measured
 5 minutes: Celebrate
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Rule #4: Independent Reflection is Equally as Valuable and Important as Group Brainstorming

Have you ever been invited to a "collaborative" meeting and then never been asked to make a contribution? Or have you facilitated a meeting where some of the attendees did not contribute anything but a modest nod of the head?

The most significant dilemma a facilitator faces is how to ensure everybody plays a part. My experience has shown me that that the people least likely to participate are almost always the ones with the best ideas. They are the practitioners: engineers, customer service reps, coders, creatives, and project managers. They are typically quiet and cerebral… introverts.

I set out on a quest to solve what I initially saw as the 'Introvert Problem'. I designed an iPad application for every participant; it failed miserably. I bought expensive interactive displays with no positive results. I used out-of-the-box workshop ideas such as using toys and games, most of which produced worse results than before. Resorting to old-school tactics, I handed large, expensive sticky notes around to everyone and asked them to write down their ideas. Sticky notes finally encouraged most everyone to contribute with positive results.

I decided to take that success a step further. I carved up a whiteboard into small pieces and handed everyone their own, individual whiteboard. Something magical happens when you hand individuals a dry-erase board: they are more creative and have much less anxiety about making a mistake and looking stupid. I believe that this is due to the temporary nature of a dry-erase board - it gives participants the freedom to make a mistake knowing they can simply erase it and try again. It was such a powerful tool that I decided to productize it and create an entire company around the concept.

Insisting upon a contribution, but giving each individual personal space and time to contemplate their ideas, produced better results than any other method I have tried. I also noted that the "extroverts" produced more thoughtful ideas when given time to reflect.

Rule #5: The Facilitator's Job is to Push the Team to Define the Outcomes

All too often, a facilitator will take "center stage" in front of a large, blank dry-erase board. They strategically call upon people to offer opinions, and then choose which matter enough to go up on the board. Steve Jobs ran his meetings this way and he was very effective and engaging, but he was the exception that proves the rule. He was a genius anomaly that is all too often modeled as the ideal. [9]

A facilitator must have the ethos that they are the servant of the meeting's objective and the liaison for everyone's ideas in the room. Their power comes from setting the objective, inviting contributions, pushing the meeting along and keeping people on track. Their role is to help resolve tough conflicts and, usually, to decide which course of action to take. A facilitator should never, ever feel they must have all, or any, of the answers. If that is the case, they may as well call a meeting to get the team to align behind their already set vision. There are better ways to align a team around a decision that has already been made than inviting folks to a meeting disguised as a brainstorming session.

Return on Collaboration

Renowned author, Morten Hansen stated:

"The goal of collaboration is not collaboration itself, but great results."

Because of this truth, collaboration can be difficult to measure. However, it is possible to measure the impact collaborative environments have within an organization. Frost & Sullivan conducted an in-depth survey comparing organizations with a mature collaborative culture to those without. [11] The results were astounding, showing that a culture of collaboration increases:

- profitability, by 29%
- growth, by 26%
- customer satisfaction, by 41%
- productivity, by 36%
- product quality, by 34%
- innovation, by 30%

Although impressive, these statistics probably do not help you measure the impact of improved collaboration within your own organization. On occasion, companies will implement changes because it feels like the right thing to do; others need to be able to track the effectiveness of any initiative. For the latter, columnist Paul Conley contemplated the metrics for measuring the ROI of collaboration. Conley suggested measuring:

- the speed of an existing process
- new products' time to market
- volume of new products
- customer complaint resolution times
- customer engagement level
- employee absenteeism rates
- employee turnover rates
- training costs[11]

Whatever the individual circumstances of your organization, the fundamental truth is that someone has to have the courage to be the champion of collaborative change and the perseverance to shepherd in that change, one meeting at a time.

Conclusion

Collaboration is the key to contemporary organizational success. Vacuum ideation may have worked at one time but this is no longer a viable solution within the complex systems and dynamic organizational structures which exist today.

Although organizations acknowledge this truth, most fail to adeptly facilitate collaborative cultures and become less competitive as a result. Changing to this type of culture is often too difficult to institute from the top down. Instead, the recommended path is to implement simple changes to the way small teams gather and coordinate their decisions. The key ingredients that ensure team engagement in collaborative meetings are:

the right values
- mutual respect
- positive intentions
- open mindedness
- embracing conflict
- alignment

the right mechanics
- in person
- great outline
- enough time
- independent contribution
- great facilitation

The gradual implementation of collaborative meetings based on these key ingredients forms a solid foundation for bottom-up cultural change.

About the Author
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In addition to founding 7 different successful companies and holding multiple patents, Anthony has had an eclectic career. He has held leadership positions spanning a wide range of industries including creative direction, feature film post-production, technological architecture, advertising production, enterprise product development, hospitality management, product manufacturing and computer-aided design.

Most notably, Anthony founded the large Denver-based consulting firm, EffectiveUI, the world's first and leading user experience and digital product development firm, responsible for the creation of hundreds of award-winning digital products for many of the world's most recognizable brands. EffectiveUI was subsequently acquired by WPP, the world's largest holding company for marketing and communication agencies, and the source of inspiration for a book by O'Reilly Publishing on collaboration in Enterprise IT, titled "Effective UI: The Art of Building Great User Experiences in Software"

Anthony also serves as the Executive Director of UX Mag, an online publication focused on furthering the practice of creating great products based on the principles of human-centered design.

His most recent start-up, mcSquares, was conceived out of the lessons learned while running brainstorming workshops within Fortune 100 conference rooms. mcSquares focuses on creating collaboration systems for high-tech, educational, and creative spaces.

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Downloadable copy of this paper or product information on mcSquares
www.mcsquares.com/collaboration

*R*eference Material

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