

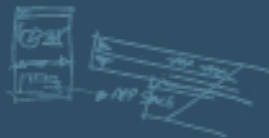
FIRST EDITION

id8

ROCK THE ROOM!

*Facilitate Meaningful Meetings,
the id8 Way*

*Free-flow Summary
Free-format (w)*



From:
id8, Inc. &
Donnell Alexander

A hand-drawn diagram of a whiteboard on a stand, drawn in white chalk on a dark blue background. The whiteboard is rectangular and has a thin border. It is mounted on a simple stand with a vertical post and a horizontal base. The text 'From: id8, Inc. & Donnell Alexander' is written on the whiteboard. There are some faint, illegible markings on the whiteboard, possibly representing a diagram or notes.

ROCK THE ROOM!

Facilitate Meaningful Meetings,
the id8 Way

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*“You go to a lot of corporations?
People are like, ‘God, I hate meetings.
Hate them.*

*Oh my god, another meeting —
I can’t get any work done!’*

Right?

*Our last engagement? Everyone was
dying to come to our meetings.”*

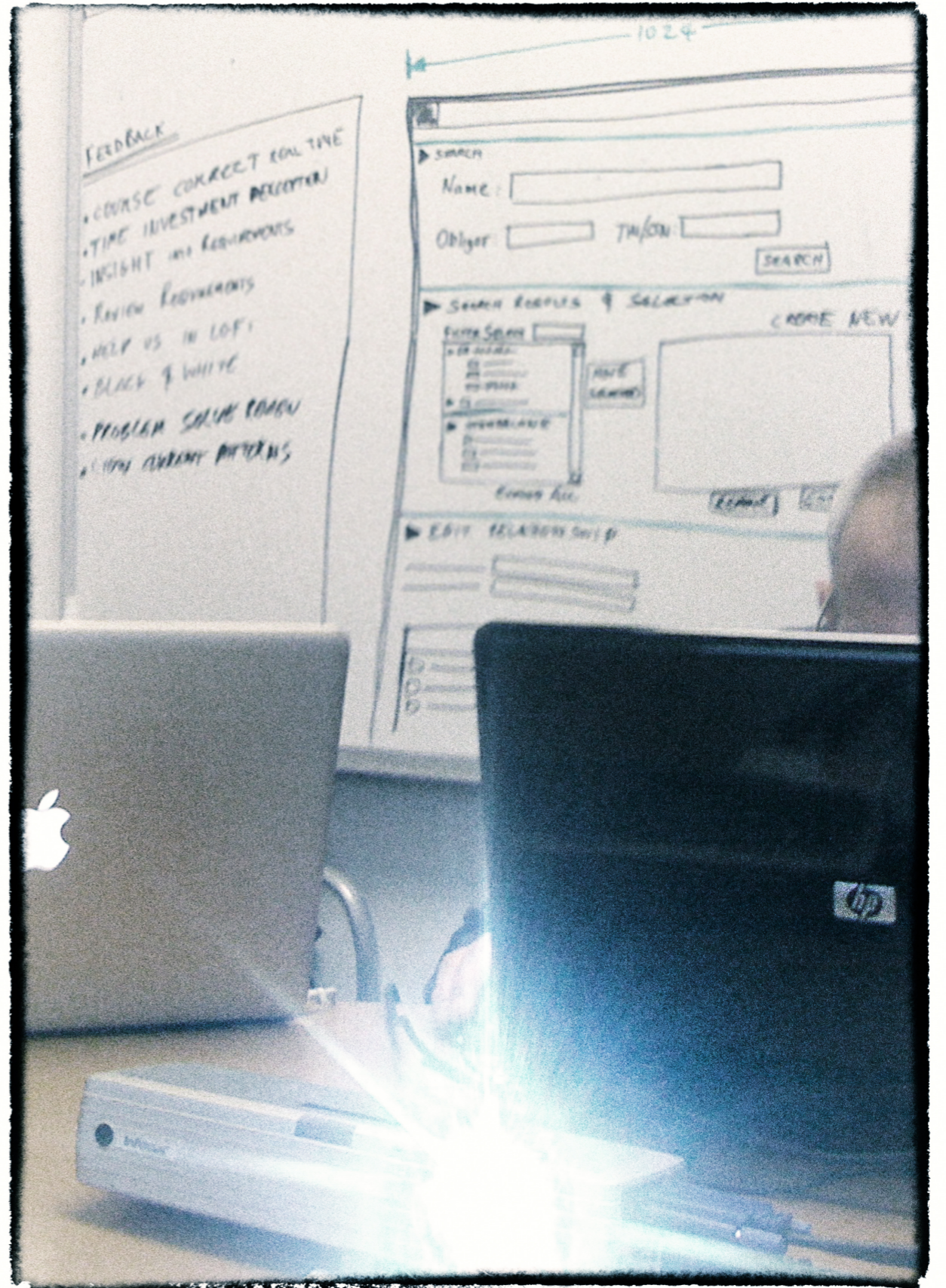
—Michael Terrett

CHAPTER ONE

I Have Never Been a Big Meeting Guy

Never *had* been one, that is.

At *ESPN The Magazine*, which I helped launch almost 15 years ago, I coined the nickname *ESPN The Meeting*, in recognition of the pointlessness ubiquity of our company confabs.



Largely because of an aversion to the counter-productive institution that is the old-school business meeting, I chose to work on my own.

So, when it came to corporate meetings, I grew into something akin to the boy raised by wolves.

Then, about this time in 2011, I began doing assignments for [id8](#), [the digital prototyping firm](#). And before I even get started explaining how my take on meetings got irreversibly bent, it's probably smart to explain the service offered by id8.

"So digital prototyping and working with our clients helps us

understand and basically address those issues easily and quickly, before you get into development, where they are harder and more expensive to fix."

That's Jason, the guy who last year hired me to write about his company.

In the name of full-disclosure, I should tell you that Jason and I go

How Does One id8?



I asked my longtime colleague Jason to explain digital prototyping in as simple fashion as possible.

back beyond the days when MC Hammer wielded pre-ironic popularity. We studied journalism together in college and, way back in the George H.W. Bush administration, made an epic journey to cover (then-)extreme environmentalism in Humboldt County. The less said about naked hippy skinny-dipping, the better.

My point is that, long before Jason ever cut me a check to explain his business, I thought him a smart and forward-looking character.

Anyway, id8's principals and a couple of other smart people and I put together a nice little project while digitally toiling out of locales

from Seattle on down to Los Angeles. The enterprise struck me, stem to stern, as almost effortless and, while we digitally huddled on the reg, our meetings were, dare I say it, fun.

Meanwhile, this short-term gig overlapped with a day engagement at a widely-known arts organization in California. For this non-profit, I'd be making an old-school, one-off brochure. It was the sort of object I had created dozens of times — a task I could have performed while simultaneously drunk, asleep and/or made dim by head injury.

So, imagine my surprise when the brochure position stubbornly re-

fused to work out. There were compatibility problems from Day One.

My employer was one of those theatrically-oriented arts gigs in which worker drama held a kind of cultural currency; the more employees appeared to be surmounting, the more they were rewarded.

What's more, I had a boss that insisted every brochure element be printed out, for editing, before it advanced along the production process. For reals: "You've Got Mail!" would ring out, then I'd go do battle with one of those Xerox-thingies that, as a long-time freelance writer and paperless society advocate, I'd never bothered to master.

What likely did me in though? That dot-org's meetings.

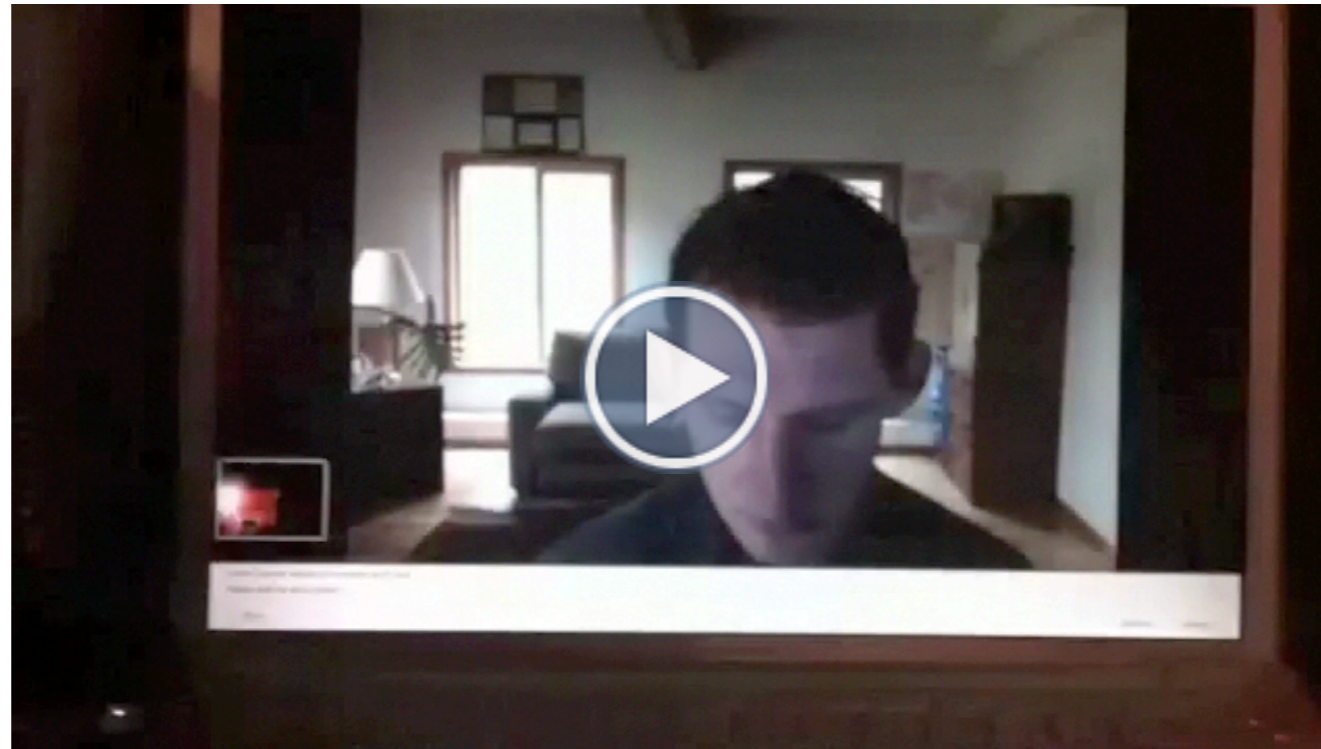
Oh, Lord. The meetings.

Each of those tedious affairs led off with introductions and recitations of each meeting attendee's name, title and job description.

And as an organization, a significant part of the project was to build toward a single, large annual event.

Which meant our staff of temporary and long-term employees grew by the week.

Why Are Meetings So Bad?



Jason Carroll has run enough meetings, big and small, to tell why they're generally awful.

Just take *a crack* at envisioning staff meetings that start off with NFL-style player introductions. Except that, beyond starters, the team's back-ups, cheerleaders and equipment personnel are also allowed primetime glory.

fab culture was exponentially more difficult than it needed to be.

It's literally impossible for me to tell you the how tedious these affairs became, because I was fired by the sixth or seventh one.

Each meeting was, literally, longer and more disengaging than the one before it — fueling the aforementioned worker-drama impulse. As with the job's rudimentary brochure production, every aspect of this non-profit's con-

My instinct was to blame id8 for the first firing in my 25-year career. They had raised the bar, instilling in me a belief that meetings had miraculously evolved since my days at *ESPN The Meeting*.

That turned out to not be true. People still despise meetings.

At best, employees and management tend to find these gatherings boring and obligatory. (Death, taxes and meetings that fail to inspire — this is how the homily on certainty ought to be amended.)

Why is this? And what can be done about it?

Jason, I need answers.

It's not that I blame id8 for how that California deal went down. It's just that my ability to put up with half-assed meetings was ruined. So, the firm effectively left me with three options in a world where office jobs remain central:

- Go on welfare for the rest of my life.
- Kill myself.
- Evangelize on behalf of id8's approach to meetings that work.

What you are about to read — and what should be mandatory for managers at your place of employment — is the least damaging option of what was on the table.

Luckily:

- 1) It's also the option Jason paid me to carry out and*
- 2) bullets are very expensive these days.*

CHAPTER 2

My Meeting with Michael



Our scene is the diner City State on an overcast Oregon day.

The joint is filling with lunch-hungry SE Portland people and the clanging of plates and glasses. A mostly-devoured breakfast biscuit sits on the plate to my side.

If I were to get the skinny on how meetings could be made not to suck, this would be Ground Zero.

We would go head-to-head in the style of the seminal indie film, [My Dinner with Andre](#).

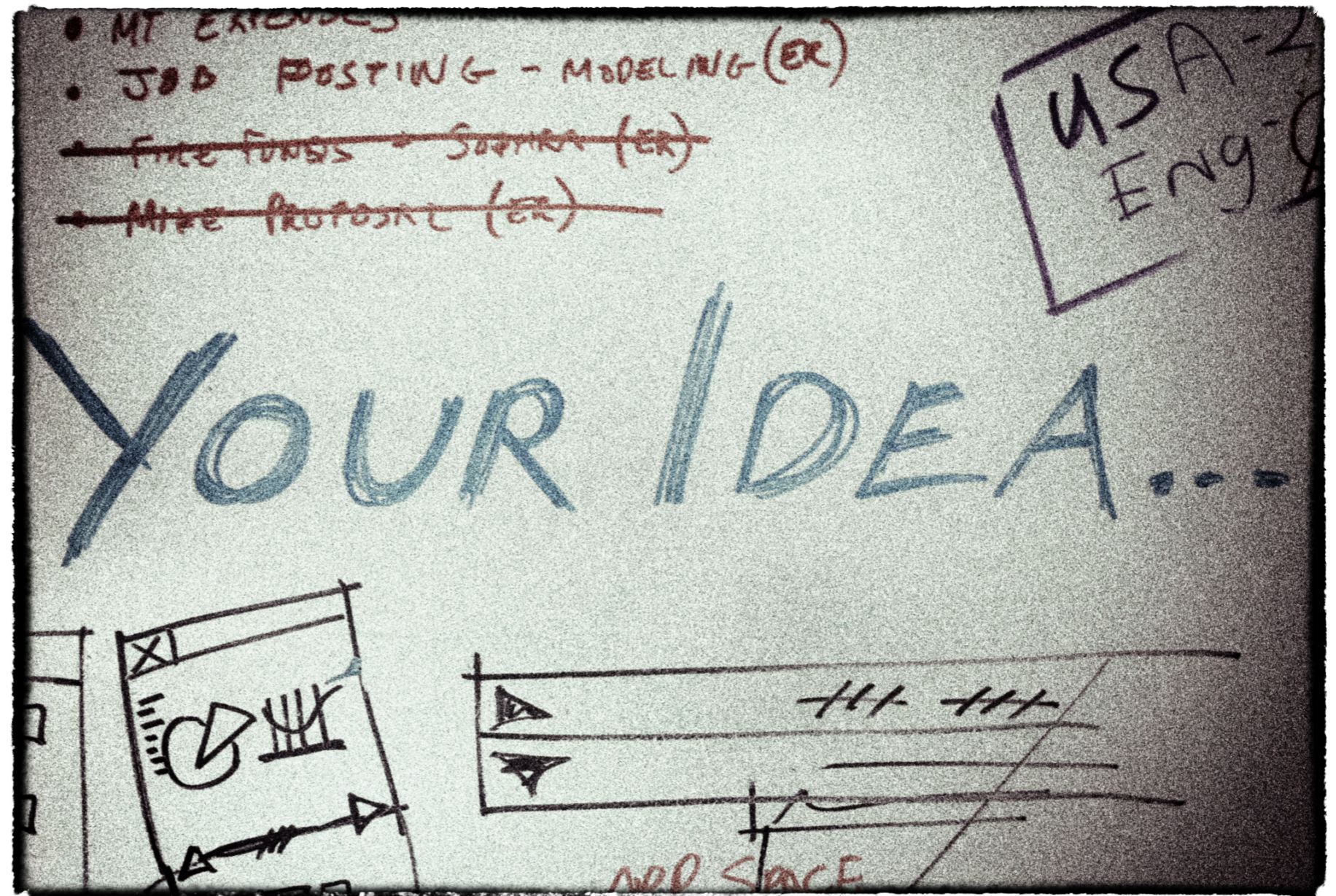
Except it would be lunch. I would play [the role made famous by Wallace Shawn](#).

Michael Terrett — casually elegant in darkly athletic attire, minimally coiffed and sporting a mere hint of facial stubble — has not eaten or, for that matter, even ordered. He's too busy talking in the British commoner accent that is his calling card.

"If someone comes to you tomorrow and says, 'Donnell, I want you to run this meeting,' as a top-shelf facilitator,

you should be able to pull that meeting off very successfully." I try to wrap my mind around the concept. I push my iPhone closer to Terrett, so that every word gets recorded.

"All you do is turn it around on the group and take the onus off of you. I could facilitate a heart bypass. It doesn't mean I'm going to perform surgery. It just means I'm



going to go, 'Okay, tell me what we need here.'

"We need a doctor," says his imagined group of convened people.

"Let's get a doctor."

"Doctor, what's your role here?"

"I'm going to make the first incision," replies Terrett's imagined physician.

"Fantastic. Who do you need with you?"

"Well, I need a nurse and anesthesia."

"Great. Who's the anesthesiologist?" Terrett continues. "And I know *nothing* about heart-bypass surgery — but I could get through one."

His point, that clear-headed delegation skills are integral to facilitating a meeting, is not lost on me. But that's not the same as convincing me my *bête noire* doesn't have to be horrible. So, I forge ahead, in search of something akin to proof.

"You go to a lot of corporations? People are like, "God, I hate meetings. *Hate* them. Ohmygod, another meeting. I can't get any work done, right?"

"Our last engagement? Everyone was dying to come to our meetings."

Terrett has me at least considering a buy into his hubris, based on the suggestion of evidence.

While [iRise-aided prototyping](#) is indeed proving to be an indispensable tool for the digital production.

But I've been to too many torturous business gatherings to fully receive what the Brit is selling; the only compelling meeting imaginable to me would be one where lottery checks are handed out. So I laugh aloud and am like, "Dude, *dying* to come?"

"Yes," he says, with a hardcore sort of emphasis. They *want* to come to our meetings."

"How do you know that?"

"They tell us. And there are two key indicators: No. 1, nobody misses it. Everybody turns up, *even if they're marked as optional or not required*. There's 100 percent attendance, number one.

"Number two, the level of engagement is high in the room. You can taste it.

"Number Three..."

Now, you may note that Terrett said there would be two crucial indicators. But he is building momentum, and who am I to stop him? He's on what I would come to see as a perpetual roll.

"They ask, 'When's the next one?' They tell you, your meetings are the most exciting meetings of my week."

Terrett radiates the affable cockiness of [Jason Statham](#) — if the action star were actually a former nanny who studied computer science and human factors at DePaul University. He brings a bantam, tough-guy energy to the table. So it's not wholly surprising to learn that Terrett actually got his career start as a stone miner aptly named

South-Central UK burg of [Shaftesbury](#).

Perhaps it's the convenience of time passed and physical distance that allows him to look back fondly on the work he began as a 17-year-old boy. The trip that's taken Terrett to Portland began with a daily 20-mile drive from his hometown of Wiltshire to Shaftesbury, then deep beneath the Earth's surface.

"You're 17, it's fun. You're with a big bunch of guys," Terrett recalls while looking over the City State menu. "It was underground. You're walking into a dark hole, you don't leave. You eat lunch there. You've got your overalls on, the hard hat with the light on it. You got the battery pack and the smoke detector.

"It was different," he recalls with a convenient fondness. "I

My friend Jason describes digital prototyping's place in the business landscape as akin to where Lasik was in ophthalmology before laser eye surgery received its big rush of publicity — a well-honed meetings philosophy is what's kept the company in the flow of contenders for industry dominance.

wouldn't want to do it now, but it was exciting."

But the 34-year-old father of two got his big break when he traveled to America as part of an [au pair exchange](#). In suburban Chicago, everything changed. The man of the house ran a computer company, which he would one day sell. Especially at the family dinner table, that businessman's influence on the teen nanny was tangible.

"He'd come home and talk to his wife about the corporate world and I'd get a gauge on it."

Is there anything, I ask Terrett, the dad said that particularly stayed with him?

"Yeah."

Here id8's meetings facilitator pauses for what is, in his case, an exceptionally long time. He is ordinar-

ily not much for pausing.

"It may sound funny, but he used to tell me all the time, 'There is no value in working for a paycheck.'"

"Did you understand what he meant immediately?"

"It took me a while, about three or four years. He was a very money-focused guy, very ambitious. I thought, 'Why would I not want to work for a paycheck? Isn't that what everybody does?'"

"His point was: *Don't work for a paycheck*. Right? Rather than work for a job and getting paid, go create a job and have that company pay you. Don't chase a paycheck.

That advice would fundamentally shape, in succession: The arc of

The Lesson that Led To id8



A Business Man's Perspective

Terrett's career, id8's identity and, ultimately, how a wide-range of big businesses approached The Former Drudgery Known as Having a Meeting.

Michael Terrett earned his degree from DePaul then he took his first serious job. There he blundered — "blowin' out mistakes left and right; I was sayin' the wrong things, sendin' the wrong emails" — but it was cool though; the company was big enough to absorb it. Then he got hired by the Chicago office of the international tech agency [Capgemini](#), and his real education began.

Terrett was a peon in the company scheme. Still, he was allowed to go on the road with superiors to help out on projects with companies as large and powerful as General Motors. On trips to Detroit and other far-flung locales, he was able to watch some of the best consultants in the field prepare for big meetings. In those sessions, Terrett paid the brand of attention he'd honed in those English mines and at that suburban Chicago dinner table.

"In meetings, I didn't know how to speak," he recalls. I literally just sat there. The older guys I learned a lot from because they were just very, very good. Very professional and very very good.

What Terrett saw from his peon's perch shocked and amazed

him. It would forever stain his brain.

"The discussion before the meeting was completely different from the actual meeting with clients. Before the meeting, it was like, 'What are we going to do with this?' and 'Where the *hell* is this supposed to go?'

"I need a presentation that shows this!'

"What if he asks *that*?'"

And then...

"We get into the meetings, and it's like... *Everything's going great.*

"We're really excited about this project. It's running really smooth, much better than we expected...' 'I can't

believe how far we've come since the last time we spoke to you guys... How do *you* feel about it?'

'Complete crazy flurry. Excited. Like, "Oh. My. God!" Then, when we're with the client: Totally smooth.'

"At the start, you think it's b.s., like, *If they knew what we were talking about last night at 10 pm, the client would be looking at us completely different.*

"But after a while you realize actually it's very important. It's important to get people to a state of nervousness and frenzy. You really sharpen up. Then when you go to

A Hardcore Song for a Self-Made Man



"*Bootstraps*," Stagger & Fall

the client you've got everything out of your system, internally. And then with the client, it's 'We enjoy this. We're doing well. How are you guys doing' That helps steady the client's nerves."

And I'm like, Yeah — It helps those presenting materials as well. See, Michael's story is reminding me of something Tony Bennett said to me last summer —something he told [Amy Winehouse at one of her last recording sessions](#).

Tony and I were jetting from Jersey to a gig in Connecticut and Winehouse was still alive when Tony told me that a month or two earlier she had been profoundly nervous to be singing with someone so iconic. To settle her down, he said to the late singer that it was actually a good thing to be nervous. That it showed she cared. This

mode of energy, in Bennett's opinion, gets transformed via performance once the artist is before the crowd.

In his years at Capgemini, Terrett picked up something similar.

"It takes a long time to figure it out. If you went to [a New York](#)

[production of a show](#), a major production. Before they go live it's freakin' crazy. 'Camera on! Lights on! Lights up!' Then when you turn the TV on, it's everything smooth. "But if you were to see that behind-the-scenes state? Your mind-set would still be in that behind-the-scenes state, and you'd miss the

*"Right now as we sit and speak, right now:
I guarantee you, all across America
there are well-prepped meetings.
And are they productive?
I don't think so."*

- Michael Terrett

main point of the content. You'd miss the elegance that's being presented, the beauty and creativity.

The trick, Terrett learned is balancing madness with method.

"If you go in crazy, crazy prepped, if you go in smooth, there's a strong possibility the result is going to be super-smooth—exponentially phenomenal. You can get the flipside of that coin; it could be a complete disaster. But in my experience, the more that people are amping up, hyping up—getting ready, excited and nervous—that range of emotion ends up coming out as a positive."

Michael Terrett was learning loads at Capgemini. He was also, to his growing displeasure, flying out of Chicago for three and six-month engagements of four and five days

of road meetings. It didn't take long for Terrett to tire of it. And the promotions that the huge company offered up looked good on paper, yet added up to little in the way of meaningful change. Not yet 30, he began to think of other things.

Things an American businessman might dream of.

"There's a strict corporate ladder at these big companies. To the next step, there's a carrot, a really big carrot. You try so, so hard to get that carrot, and you think you've made



that massive leap, but really it's a tiny step. Incremental. You think you're the big man on campus, but to the rest of your world it's like, eh."

My man Jason was also at Capgemini, a level up — a manager. And together their murmurs of dissatisfaction began resonating as rumbles.

"You don't realize those promotions mean so little until you've got them, right?" I ask, having exited the corporate dancefloor some time ago.

"You don't realize until you've *left* it."

Making perfectly fine money in a perfectly fine city, Terrett made a big move, emboldened by a Capgemini col-

league, an engineer on contract and working out of San Francisco.

In almost no time, Michael Terrett, Jason Carroll and Eric Ro-

manik, corporate cogs in the Midwest transformed into the hub of a virtual office based on [The Great West Coast](#).

When the Status Quo No Longer Will Suffice



Eric Romanik and company walked away from perfectly fine work in a perfectly livable city to take their shot at changing the game.

CHAPTER 3

Before Everyone Is Convened



Our waitress is a coltish, dark-haired beauty. She sports the heavy-framed lenses that are so popular in Portland.

She asks Terrett what he'll be having with his salmon Eggs Benedict and English muffin. When he answers her question of whether he'll have grits or potatoes with them and he

answers “neither” in a fashion that rhymes with “lither” the buckle of knees is all but apparent.

The overwhelming majority of people running meetings in America can't have the asset of that accent. They can, however, develop the discipline on display.

It turns out that I, the meeting ne'er-do-well, am halfway there. Even as I'm still not certain what a strong confab looks like.

“There's a lot of components,” Terrett goes on, eggs en route. “If I was to characterize a good meeting, it's about efficiency. To have your stuff ready to go on time, so that when the client or meeting attendees walk in, everything's ready: the projector's on, the Live Meeting

Perception Versus Content



Striving for Balance

is on, [WebEx](#) or whatever is ready, the phone line is open.

“Everything is ready, and you're just sitting there waiting for them, similar to today, he adds. “I come here, you are ready to go: Computer on. Dictation-thing ready. ‘Let's get started.’ So then it's all on me to get here, get settled in and get ready.

“There are tactics you've employed, whether you intended to or not: I've done a lot of research on this. I'm excited about this project. I'm ready to go — these just turn the tone of the meeting to a much more positive one.”

It turns out that much of what makes a meeting pop is stuff that goes on prior to anyone's arrival at the conference table.

But nevermind the conference room; Terrett begins to insinuate that a meeting can be made or broken before one even enters the building.

“For example, the minute that we pull up to the client, to the parking lot, we're being watched,”

That sounds crazy, sort of paranoid, if you ask me. But I've just been thrown this bone of being told I'm ready to run the show. So, for now, benefit of the doubt is Terrett's to lose.

“If you happen to have a nice rental car, it's important that you park it all the way in the back of the parking lot,” he continues. “On av-

erage, the staff that we work with aren't making the kind of money to be able to afford a rental car like that. When you pull that up to the front door of a client, they're gonna be like, "Who is this guy?"

"You fly in, they think you're this fancy consultant, right? Now, that's what they think. The truth is, we *are* expensive. We *are* fancy. But

Hide the Fancy Upgrade



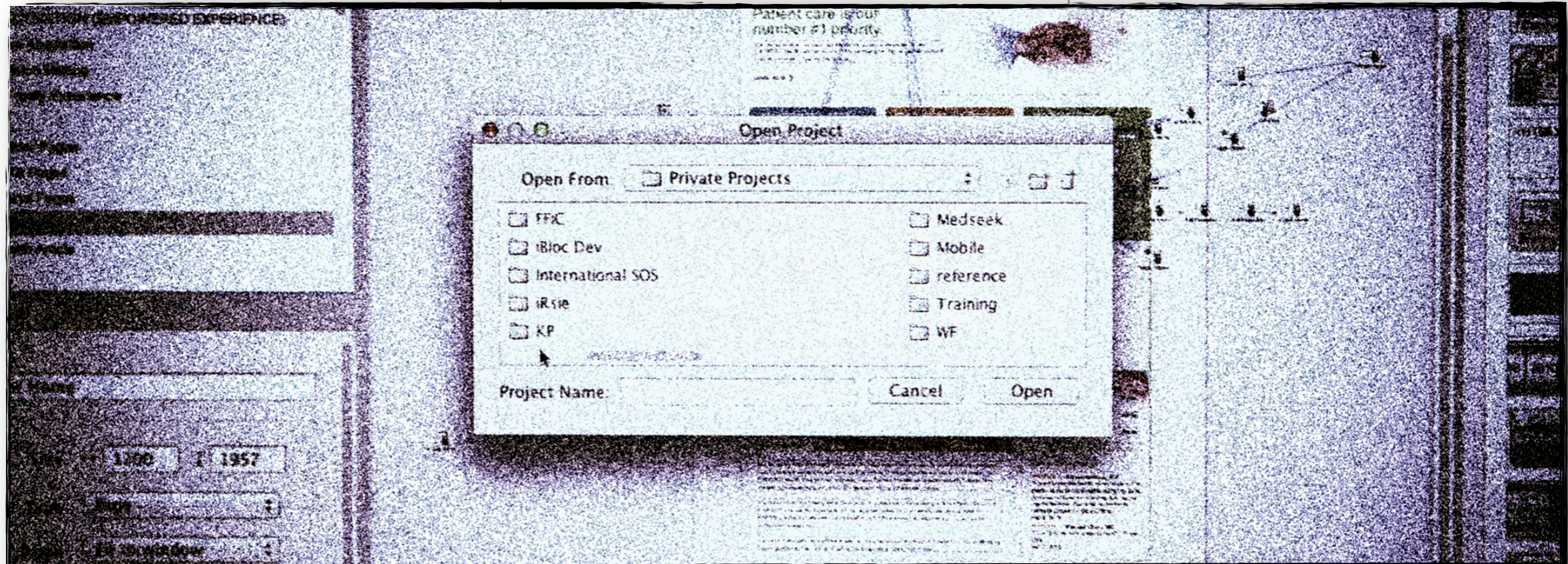
Parking Lot Manuevering

you can't turn up with that kind of perception. It's something I don't want to deal with, a place that I don't want to go."

That advice? Didn't see it coming. A pattern seems to be in development here: The crazed pre-game huddles before showtime.

The fancy rental in the parking lot hinterlands...

What's come into focus is that putting on a solid-to-inspirational meeting calls for a lot more than the good sense not to have everyone



“Eric and I are constantly on this perceptions versus content struggle to balance, and then we’ll hit [equilibrium]. Jason is much more holistic in the picture. He gets perception, he gets content. But also, he’s going to run the company.”

- Michael Terrett

call out their name, position and where they played college ball before running through the agenda.

It calls for a gauging of perceptions.

“Perception, to me, is the most important thing. Other people would say that it’s content — what you deliver. That it doesn’t matter if you turn up sloppy or you’re swearing in the lobby,” Terrett opines, his face a mask of dissent. “A successful engagement is 65 percent perception, 35 percent content.”

He goes on to explain that his is a mildly debateable notion. For example, his partner Eric Romanik would say nearly the reverse is true, that success in meetings is about 70 percent content, 30 percent perception.

This is confusing to me. I am not clear on how id8 manages to work if the principals at id8 have such differing senses of what matters.

“We hit an equilibrium,” Terrett says. “It ends up being 50-50. If you left it to Eric, it would just be about deliverables and not focus on presentations and little tricks for the meetings. He’d be like, “I’ve been up all night delivering all this and everyone at the meeting would be like, ‘That’s great... and these meetings are boring.’”

“If you left it up to me, it would be: Here’s the meeting and everyone would be like, Great. I had a right laugh! But *where’s the freaking work?* So, he and I together bring that about.

“Where Jason is different is, he’s good on both. He’s good on perception and he’s good on delivery. He pulls us forward. So, me and Eric are constantly on this perception-content struggle to balance, and then we’ll hit it. Jason is much more holistic in the picture. He gets perception, he gets content, but also, I’m going to run the company — “I need operations, I need sales... all that stuff.”

Terrett has spent time tutoring Romanik, id8’s engineer, on communication flourishes such as maintaining eye contact in the room, even going as far as taking away his fellow principal’s chair so that he’s engaged meeting attendees as deeply as possible. Romanik, in turn, has his young charge making prototypes that

range from glorified wireframes to iRise realistic. Meanwhile, Jason Carroll brandishes a set of skills that holds the entirety of this operation together.

A Foreman + an Engineer + a Holistic Builder. These components are what it takes to run a prototyping firm like id8. They aren’t talking to you from on high. These cats mean business.

When Your Meeting Room’s Awry





“You make the jokes short and sweet,” answers Terrett. There are countless tips like these — for example, don’t dress like a Hollywood hipster if you’re facilitating a joint in Peoria — but they all add up to basic common sense. The real dirt I’m digging for is how to get out of facilitation nightmare situations.

And there is indeed this genre of nightmare.

“I’ve seen people not check to make sure they

have an Internet connection in the conference room — not every conference room has one. That’s not *my* worry because my phone can tether and I can do a connection from my phone to my computer.

“I’m seasoned enough that if anything goes wrong I can navigate around it. Say there’s no projector or the projector breaks or some screw-up has not hooked it, I’m okay with that because what I’ll do is find a little box, put my laptop on the box, turn it around and say, Sorry, projector’s broke, but gather around and take a look. I’ve got a

“Nightmares”



Loot

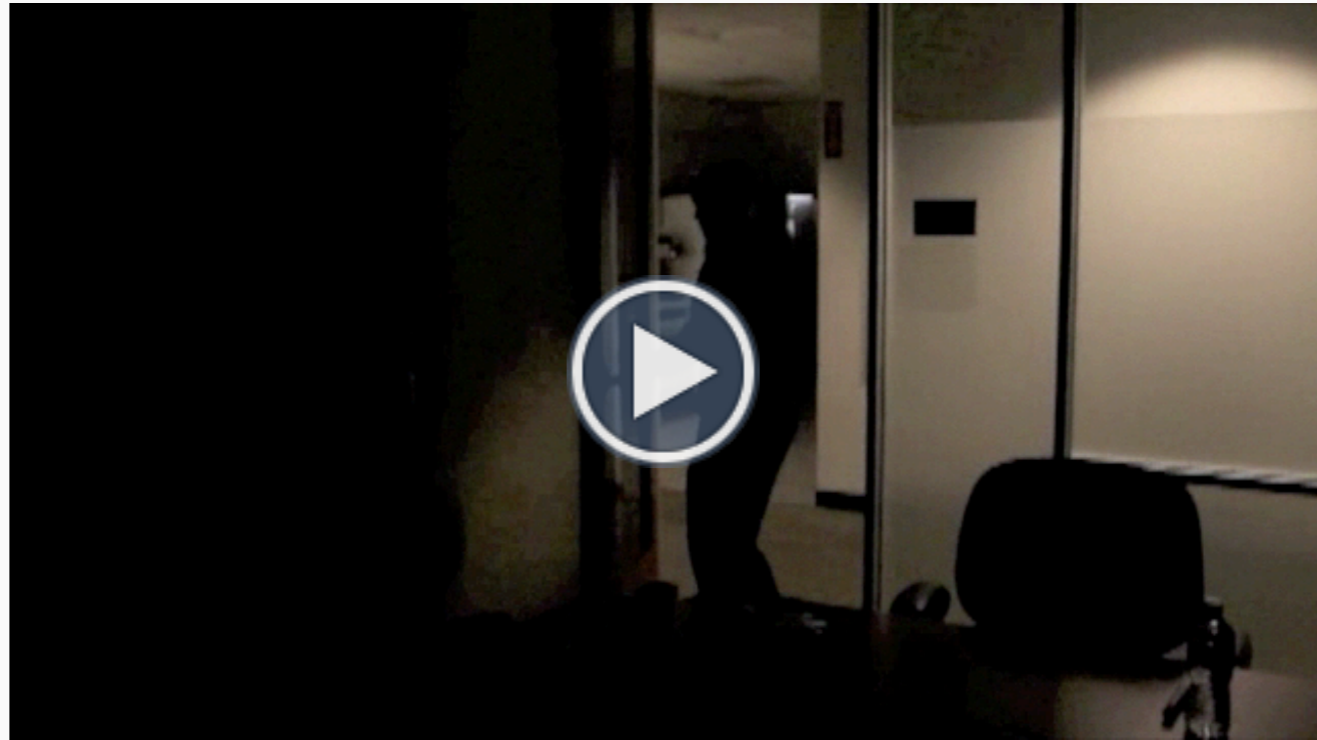
pretty good answer for anything that can muck up, ya know?”

At this point he polishes off the meal. Our waitress, attentive as ever, asks on the meal. Terrett makes her feel as though he’s never had a more tasty Eggs Benedict. She walks away glowing.

“But I’ve seen a lot of mistakes. I’ve seen people forget the conference dial-in number. People have not turned in the meeting invite and include the WebEx, where they can jump on the web conference.”

Meeting runners announce, “Here’s the agenda.” And someone will stand up and say, ‘We don’t want to talk about that.’ Then the presenter stands there, mouth agape. The wind is out of their sails. I’ve seen that happen a lot of times.

Good Room, Big Picture



Optimize Your Meeting Space

“A couple of weeks ago that happened to me. A guy was like, ‘This is the wrong stuff.’

This issue strikes a particular nerve with me. Years ago, when I was promoting [my memoir](#), a guy followed my book tour around to various readings and heckled me. I’d be reading the thing and he’d

shout out, “You suck!” I eventually responded with a comeback, but it was too stinging. The room perceptibly turned against me.

Still appalled, I ask Michael in all seriousness, “What do you do?”

“You turn it around, put it all on them. ‘Thanks for the comment.

Let us know what the right stuff is and we'll see if we can work through that.' Nine times out of 10, they'll be like, "Uhh..." You say, 'Why don't you go think about that? And meantime, for the other people in the room and on the phone, I'm going to start going through this stuff.' It's easy."

"There are strategies to deflect, to move on. You could be like, 'Oh, I'm sorry. Let's reconvene the meeting later.' But you'd look like a wimp."

Turns out, there are a variety of nightmare scenarios one might happen upon while leading a meeting.

"Those are content disasters, but there are also facilitation disasters," Terrett says, "how the person has conducted themselves or facilitated the meeting. They might be

Arrangement, *Sans* Ambiguity



They Sit, You Stand

hard of hearing, or too busy typing and trying to take notes and not looking at what people are trying to say in the room."

At this point he mimes a facilitator typing heedlessly into a laptop as an attendee says, "I think we

should do this." Without looking up, Terrett's preoccupied facilitator goes, 'Oh, Okay... Anybody else?'

"It's just *wrong*," he insists. Not only is the person offering comment lost, but those who've

watched this seemingly minor episode become disengaged as well.

All good. But there's something that's been gnawing at me.

At smaller companies, they don't necessarily have a range of

choices, in terms of deciding who's going to be in charge of meetings; not every company has a Terrett in tow.

So, I ask, "How should you be if you aren't a natural at running the show?"

"I think you've got to be pretty aggressive," is Terrett's answer.

"You've got to be very confident. You've got to be okay with going into deep water. If someone asks, 'Did you read this?' You should be like, 'No.' And be okay with that.

You've got to be okay with being thrown an unbelievable curveball: What you've been talking about has completely changed. We're not doing that anymore.' Or, 'Before you get into this content, I just want you to know we're not going to do any of this.'

"A lot of people, when they hear that?" I say, "they're all like, 'Oh my—'"

"They're like a deer in headlights" he interrupts. "But, again, there are easy techniques to circumvent that stuff. You would say, 'Appreciate that feedback. I'm

Manipulate Space for Fun and Coffee



Donuts At Meetings Are So 1990s!

glad you're open and honest enough to let me know, because I don't want to waste anyone's time here. Can you tell me what you think will happen so that, while we have everyone in the room, we can discuss it?"

About that aggressiveness

I wonder aloud, "Is this a state of mind or is this a combination of technique and state of mind?"

"It can manifest itself in techniques. It's an aggressive technique to tell this guy, 'No problem. You tell us what you think we should go through.' It's aggressive when you ask for feedback on what you're showing on the screen and it's quiet, right? And you say... 'John, I want you to tell me what you think.' It's pretty bold, but anyone can do that. You have got to be ag-

gressive to be able to pull these techniques off.

"You need to make sure you're the alpha male" — or threatening animal, regardless of gender — "in that room. No matter what the title or job description. No matter who's more senior than you, no matter if they've paid you to be there. Even if the senior VP or CEO of the company makes a comment? You are not cowering down to that comment. You are like, 'Thank you very much, Jane. I appreciate your feedback. Paul, tell me what...' And then move on to somebody else, right? So they know, even if they're the chief executive of that company — that big, scary chief executive — *you* are the one controlling this moment. You are the one you have to put your hand up for, if you want to ask a question.

"It's very important to have a positive attitude. If I'm asked to come on a project and it's in the red zone, it's screwed, it's no good me going in there and say, 'You know? This is f-cked.' How does that help anyone? If I'm on a ship and am told to row? I'm going to row until someone tells me to stop rowing.

There is such a thing as being too aggressive, right?

"When you talk about what you should never do in meetings, that's one that you just hit on. You should never be like, 'What's the point of this meeting?' What's the point of this project? Why are we here?'"

This one stings, as I've been That Guy before. Going all the way back to college I've run some publications, both as a freelancer en-

A Shortcut to Strong Morale



Subtlety Is Inherently Underrated

dowed with total control and as a campus journalist. And over the years I've told myself that everything I did was bang-up. Fact is, maybe I turned off a few potentially fine writers and artist and photographers.

Of all the things Terrett's said, this one is the hardest to hear.

"There's being perceived as too arrogant. It's a fine line. And you've got to find that line. You've got to be able to pull these techniques off.

"How far is too far? You want to be that high school teacher who was not like the cool teacher. Not the soft teacher, but the authoritative, really good teacher. You want it to be so that they have to ask you to make a comment.

Balance [Mr. Tibbs](#) against [Mr. Kotter](#). Got it.

"They're calling you by your name and asking, "Michael, can I add a comment? These could be people on the phone that you've never met and you have no relationship with. And you never will," he goes on. "They are calling your name because they know you are the leader of this pack. And they know that if they want to get a comment in they have to go through you. Why? Because everyone else is doing that.

CHAPTER 5

Rules of Engagement



Let's break from lunch and look briefly at a real-life case.

A strong facilitation component can make even the most delicately executed business engagement wind up on a powerfully uplifting final note.

The principals at id8 learned this early on, while working with a West Coast company seeking to design a system for clients to get automobile insurance quotes.

This digital product would have a tremendous impact on the company's bottom line.

Jason: At issue were financial concerns, from the President/CEO on down. Insurance companies are very conservative, especially if you're monkeying with a channel that makes money for them.

Eric: With any software development project there's risk, both in cost and budget themselves, but

also in terms of how the new product is going to affect their business. So, in the case of an application that affects the way the company makes money, if the new application doesn't work well, that can affect the company's profitability.

Michael: They were like, if it ain't broke, don't fix it.

If you aren't doing it right, of course it's going to screw things up. But we were going to streamline the steps it would take to process a transaction. You can save a company millions of dollars because it doesn't have to, say, have three servers now.

Eric: The fear was that, by making some things better, they could negatively impact their bottom line. Digital prototyping helps to alleviate that risk because the stakeholders can see the product before it's built and understand how it can impact the end user experience and how it could impact the bottom line. You can also put it in front of users so that users can actually test it.

Michael: But we come in for the first meeting and ask what the project is about, and they're like "Oh God. Here we go again."

Jason: We identified a group of stakeholders and kicked off the project and told them what our hopes

were, what our fears were and how they would help and participate throughout that.

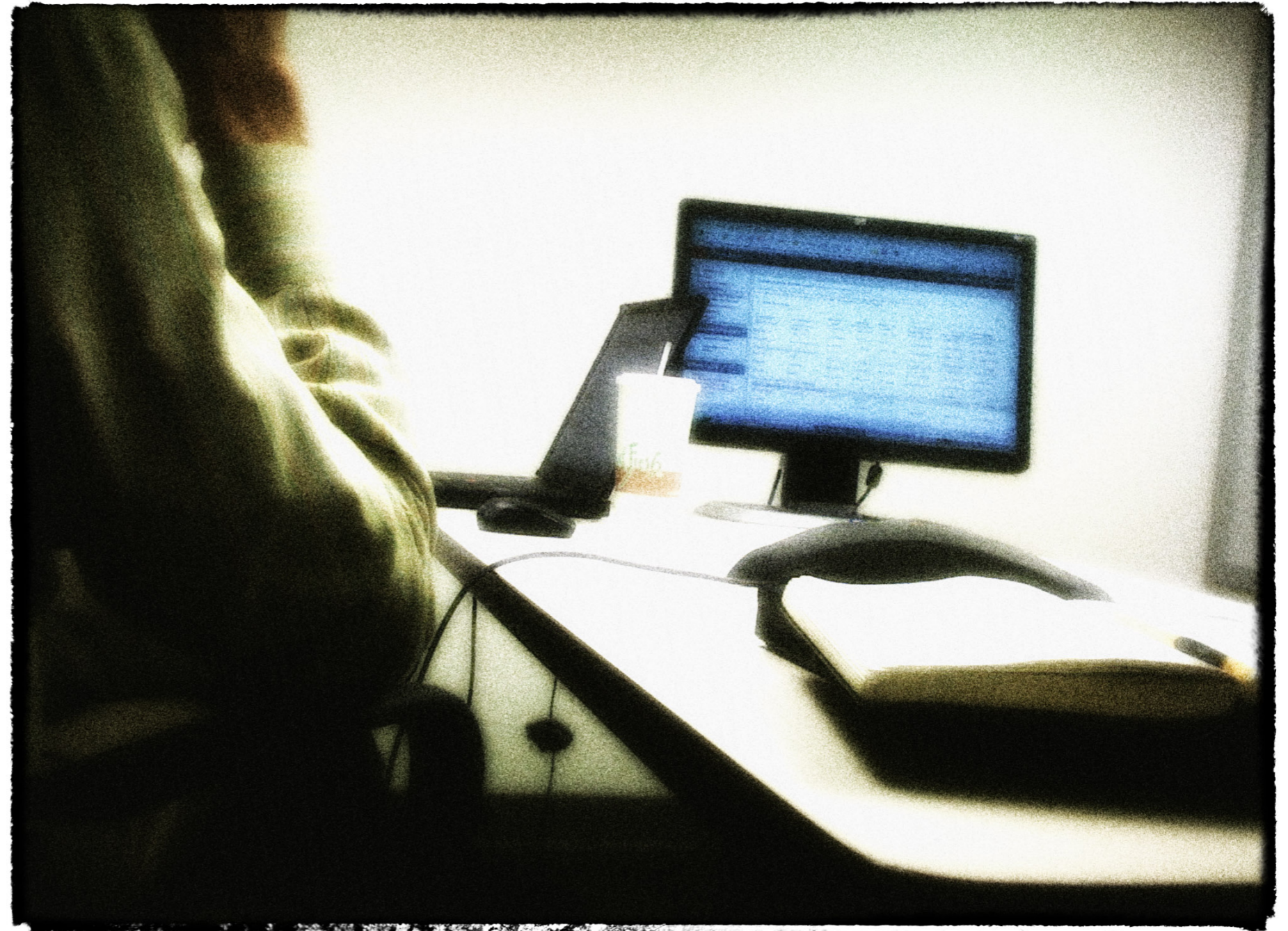
Michael: Jason was facilitating a big review for the CEO and he was trying to show that, hey, this is going to be the future of this insurance company.

He projected on screen the transaction prototype. This was a couple of years back, and now it happens all the time. But then it was a big deal that you could submit a claim online.

Jason told them that

they'd be able to go on the Internet and it would be this great thing, for customers to talk online and submit

something. He shows the prototype and a typical CEO — 50,000-foot level; probably has some idea about



what this project is, but not the finite details — he's just here to say, What am I spending, X million? Let me see if it's any good.

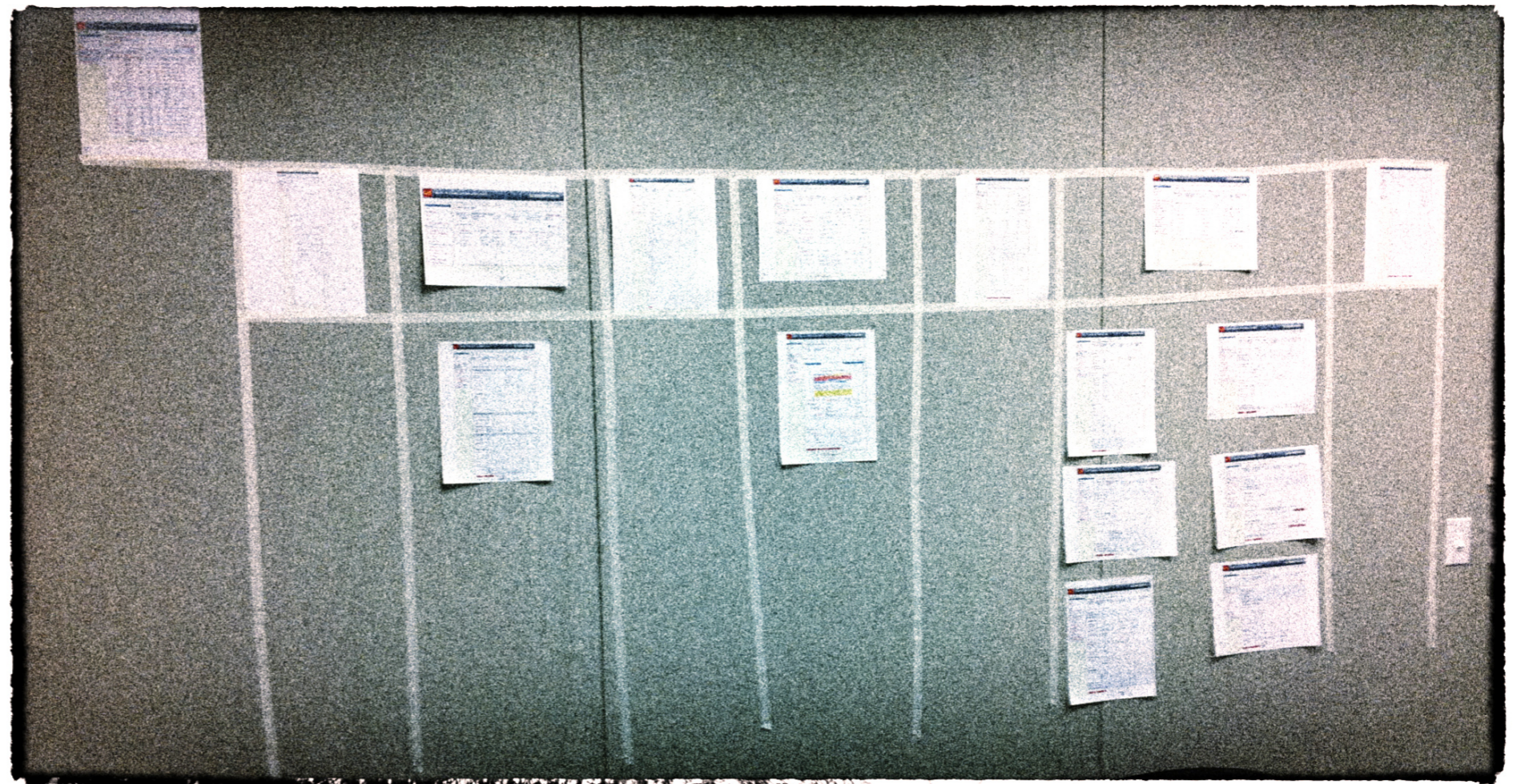
So, in order to show if it's any good, they have this realistic prototype up and running, and Jason's working it. He pumps in a user's information — on a projector, on a big screen — and he's just about to hit "Submit", right?

The CEO's like, "*Don't* hit that button!" Everyone in the meeting gasped. It was the only thing he'd said all

day. He said, "It costs me 15 dollars to run a credit check if you hit that button."

And Jason's like, "This is a prototype. This isn't going to cost anything."

Jason: That was a magic moment. The CEO was so caught up in the experience that he forgot that we were reviewing a digital prototype in what could have been a boring meeting. He was focused on what



we could deliver and how it could help his business.

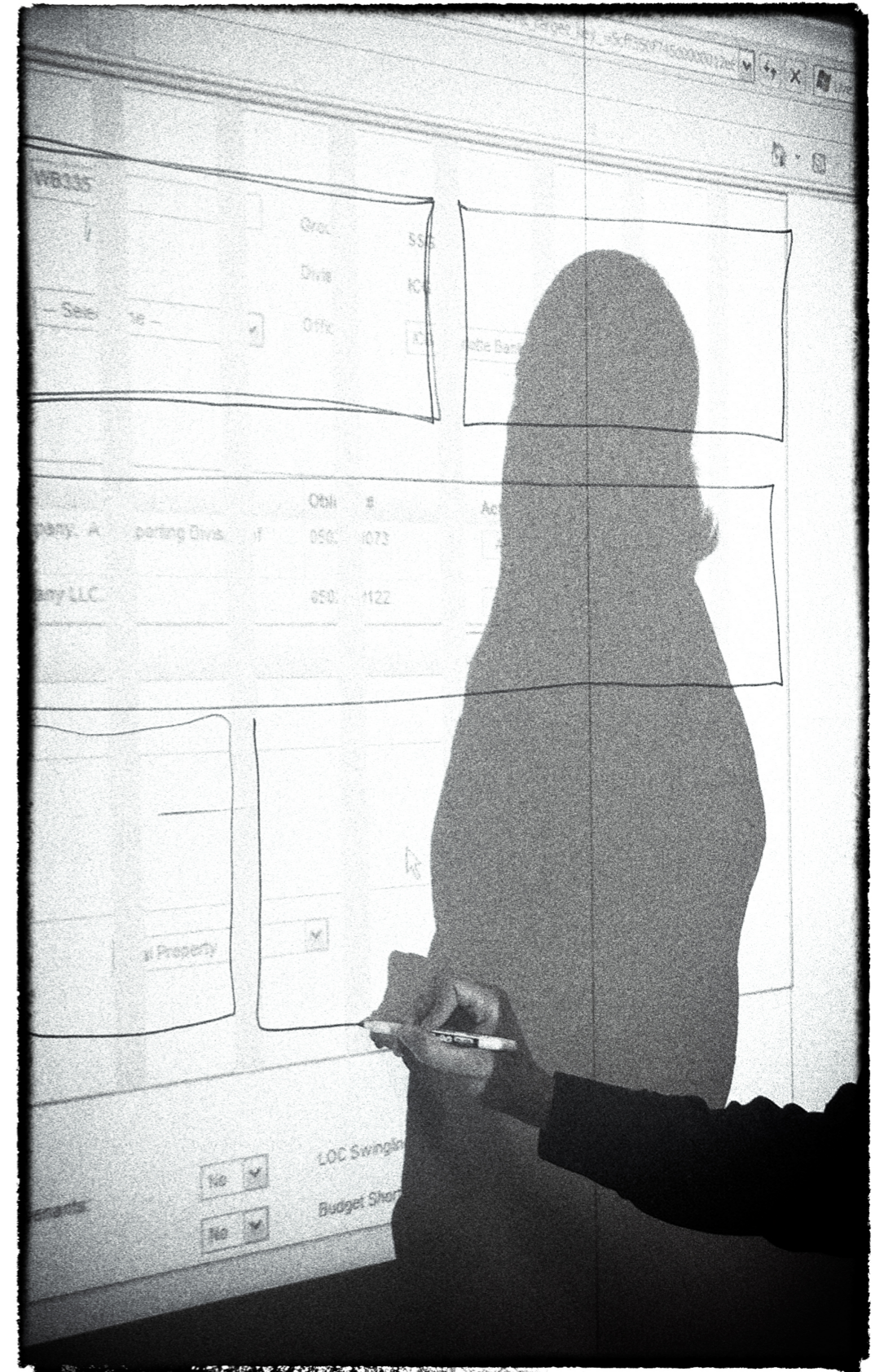
This level of engagement is what we love. Getting stakeholders excited and invested in our feedback sessions.

Michael: In the first session we had talked about what the project was and what we wanted to do. We brought back a prototype and clicked around it and the stakeholders had something to react to. If we hadn't done the prototype we would have just brought the comments and they would have said, "Yeah, that's what we said."

We were building momentum, like a snowball rolling. We wanted

the snowball to build-
ing to a level of clarity
where everybody knew
exactly what we
wanted to do.

Jason: We would gather feedback and we would track feedback from session to session. The first session I gathered 50 comments, at the second session I gathered 150 comments. We plotted out and I would talk to them about this. I said, "You know, my expectation had been that feedback would



drop. But it only continued to grow. I thought that spoke to their trust in the process, their level of comfort and a sense that what they were saying was being realized.

Michael: Those first comments came on Monday's session. Then everyone went back to their cubicles. Tuesday and Wednesday we're at desks, too. On Thursday they

came back to meet. That's when we generated new comments. They loved it because it usually took so long for them to see results, before they can see something in the web browser.

We repeated the session until we nailed it.

Jason: I told them at the beginning that they were going to have a series of meetings throughout the engagement. I'd told them we were going to meet once a week for six hours, and there were groans.

By the time we got to the sec-

ond and third week, it was the high point of their day. The people would come and we would facilitate the discussion. They would get

excited and enthused. By the time it ended, they groaned because it was going to be over!

Jason: We were up all night and came up with a really good idea to a tough problem. We came out and were so excited as consultants, we said, "This is what we're gonna do! We stayed up all night and here's what it is, and people were clap-

ping, like, "Oh my God, that's the best we've ever seen!"

Then this little lady in the back of the

room who had never spoke before raised her hand timidly and said, "But it can also do this, right?"

"I Wanna Dance With Somebody"



Rademacher

Rule the Room Like Michael Terrett

Review materials thoroughly before you start

Be mindful of how you can set perception

Know who and how many will attend your meeting

Prepare all of your equipment before you start

Clean the whiteboard and straighten up the room

Embrace chaos and be ready for anything

Don't let participants get distracted by their laptops

Bring free coffee and treats to make it fun

Make any jokes short, smart, and non-offensive

We had never thought of this — the hair on the back of my neck still stands up — and we were like, “No, we had never thought of that

— and it's so much better than what we had!”

And that never would have happened with a traditional meet-

ing. That never would have happened with email feedback. It required that face-to-face and sense of collaboration, really that trust to speak in a safe environment.

This story is so sappy, it was literally tough for me to type it. But it did indeed happen.

So.

Here is the kind of happy ending outsiders don't expect to hear in the world of business.

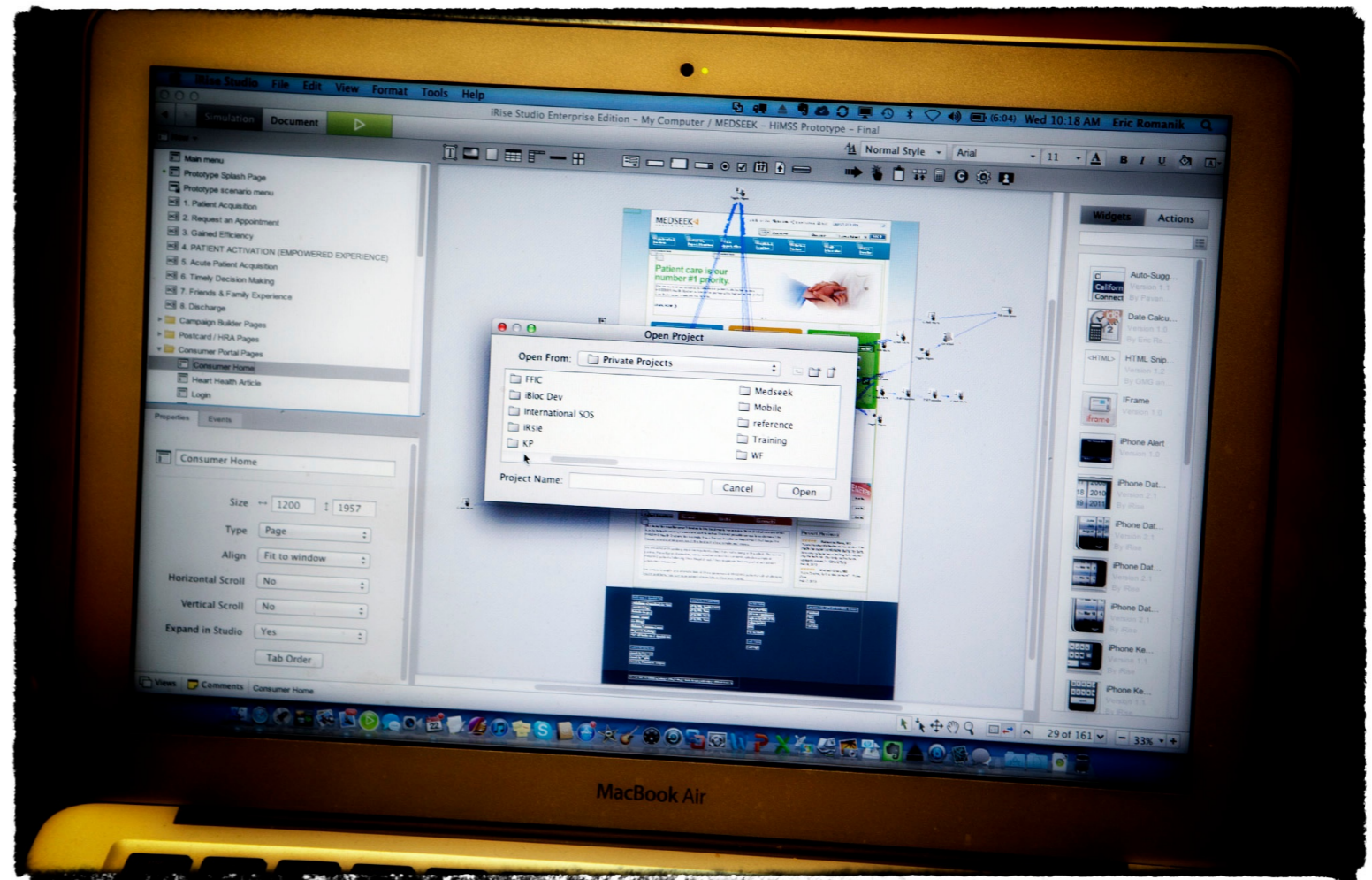
One senses that, in the id8 worldview, there's little embrace of the outsider concept, where their clients are concerned.

CHAPTER 6

The Catsup and the Hot Sauce

Question: How would id8 function if it didn't have its strong meetings component to help out with requirements?

Answer: *It would be tremendously hard. That's just trying to keep everyone on the same page in terms of tracking requirements in a new digital product. We have some tools and processes in place: We create a digital prototype. We host it on a server. Anyone can log in and view it. So, they can follow along.*



But we know that people are busy. They don't have time to do that, and the level of discourse or feedback that we'd get would be limited and stifled. It would just cause more confusion. They'd look at it, write an email, ask, "What does this mean?" We'd try to bat it back and forth.

At the meetings is really where it comes together.

—Jason Carroll

Out of the ether and back to Portland.

What relationship, I ask the guy across the booth, does a good meeting have to the requirements component of what you do?

"In between the idea and reality lies the shadow," says Michael Terrett. His plate is long gone. It's

just us, my reporting tools and a few bottles of condiments.

And now seems a tough time to start coming across cryptic.

He's actually quoting Steve Jobs quoting [T.S. Eliot](#). But let's keep it simple: What are digital prototypers talking about when they talk about requirements?

Jason?

"Requirements are the blueprints for the software that you are building. For most projects these requirements are a combination of written words and wireframes. People are

spending countless hours and millions of dollars based upon these requirements, and still most IT projects are over-budget, take too long, and ultimately don't meet the business requirements.

Key Facilitation Takeaways

Appoint dedicated notetaker

Play the "dominant teacher" role

Get people to close their laptops

Command eye contact

Modulate loudest contributors

Encourage modest attendees

Mind the aggression line

Balance content vs. performance

Try to make it fun and exciting

It's because these traditional requirements can't possibly describe everything completely. Words and wireframes are ambiguous and open to interpretation. That's where digital prototyping comes in. We create high-fidelity simulations so that everyone has a crystal-clear idea of what we need to build. Instead of written requirements we create enhanced visual requirements."

Acknowledge and Engage



And See Improvement

"I'll go to the internal team," Michael adds, "and say, "Where are we stuck?"

Jason explained later that well-run meetings are a critical part of

this. id8 needs to facilitate these meetings so that:

- The right people are "in the room"
- Everyone understands what is being reviewed and how they can contribute
- id8 gathers, elicits, and analyzes feedback from the participants



- The firm then iterates the design of the digital prototype and explains how participants' feedback was integrated

It's late in this engagement. Michael throws down an American Express card, but City State doesn't take American Express. The alternative is provided. I pack up, my long-gone breakfast biscuit paid for.

We walked out of that above-average diner. Gathered outside its doors like a conference of the world's most shiftless were a band of hirsute white wastrels, men of the meth-informed variety that Northern Oregon, U.S.A. has in greater abundance than it does artisan beers. And there's a *buttload* of artisan beers in and around the area.

These dudes were not made of the stuff that gets parodied on *Portlandia*. Too darkly mundane, they were, in fact, not going anywhere. Terrett stiffened as we passed through the patchouli gauntlet they lay down.

"This freaking city sometimes," he said. Except he didn't use the word freaking.

I immediately developed a theory: The sensibility of this man who had literally worked himself up from underground to an upscale world away had *not* been offended by the fact of these able-bodied young men not working at 2 pm on a Tuesday. No, what I think bothered them was the quality of their meeting. There was no clear leader. No one seemed energized. And no one, clearly, had brought coffee.

Key After-Meeting Takeaways

Collect any documents and artifacts

Take photos throughout the engagement

Analyze feedback and gathered materials

Follow-up and keep attendees informed

Review issues and risks with project owners



These clowns couldn't facilitate surgery if their lives depended on it.

There's more to these meetings than strategies and the stuff that's taught at Capgemini and in Human Factors at DePaul. It's something

Terrett said, a quote I hadn't bothered to note.

The question was, "What's the fun, ultimately, of making meetings fun?"

"I think people get that you too are a human," Terrett had replied.

"And you're not just someone who's trying to make a paycheck. It shows you care about a project. I try to care about every project I go on to. Really care about them and try to make a difference. Because if I don't? I've wasted five days away from my family, and that's b.s. I want to go home on Thursday or Friday night thinking I've made a bit of a difference. Again, this could be a tiny application on a tiny website in a huge corporation that only 20 people will ever see in their lifetimes. That's not the point. The point's that I've made a difference on their team; we're doing something good here."

So that's the secret. If you have anything close to self-respect, please make your meetings not suck.

This Has Been An id8 Engagement

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Music: Rademacher, “Orchestra”

and “I Wanna Dance with Somebody”

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You can learn more about id8 at id8.com and follow us on Twitter at [@id8_prototyping](https://twitter.com/id8_prototyping)

ROCK THE ROOM!

Facilitate Meaningful Meetings,
the id8 Way

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*“You go to a lot of corporations?
People are like, ‘God, I hate meetings.
Hate them.*

*Oh my god, another meeting —
I can’t get any work done!’*

Right?

*Our last engagement? Everyone was
dying to come to our meetings.”*

—Michael Terrett