Obtain Better Advice From Clients

John Brooker

> "The client workshops have been a real success. The team has done an amazing job. All customers found the new format very valuable and are now requesting a proper follow-up on the work that has been done."
>
> Client

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Please contact us for a brochure about how we might help you enhance your client meetings. For further articles, please see our website.

Would you like to improve the quantity and quality of advice you obtain at meetings with multiple clients, for example, annual client conferences?

Introduction

Many organisations hold annual meetings with clients to build relationships and:

- Launch new products and services, and explain strategy and plans
- Gather opinion on existing products and services (e.g. potential issues)
- Obtain advice on products and services under development (e.g. to prioritise features)

They will often spend a great deal on glitzy stage shows, "whizz bang" presentations and keynote speakers on product launches. However, when it comes to gathering opinion or obtaining advice, they can fall short, holding workshops that are poorly designed and run, that fail to gather enough feedback of good quality. Worse, they can bore their clients and give a poor impression of the organisation.

Every contact with the client during such meetings needs to reflect the image you want to portray. You might say your organisation is dynamic and innovative but a dull workshop led by a nervous or arrogant facilitator will send out a completely different message.

Background

Recently, the Director of Global Strategic Marketing in a large multinational company asked Yes! And... for support. Could we help them enhance a number of information gathering workshops during their annual corporate customer meeting?

They told us that the intent of this part of the meeting is to:

- Provide customers with an overview of the product roadmaps and gain their feedback and input
- Explain the potential enhancements to products and gain a sense of customer priorities

The workshops are run by Product and Relationship Managers more used to presenting and gathering information in smaller meeting. When running workshops in previous years they had found it difficult to obtain the quantity and quality of advice they needed and involve and interest all of the customers. Consequently they wanted guidance on how to design and facilitate the workshops.

To meet this need we ran a one day development workshop to highlight the importance of creating the right climate, show the value of a participative and interesting approach and develop facilitator confidence.

Whilst we designed a rough map of the workshop, the majority of the learning was ad lib, responding to the needs of the participants.

Learning

Here is the learning from that workshop that I trust will help you enhance your own client meetings:

Create the Climate

By climate I mean the physical and mental climate in which you run your client workshop. If you are running a workshop that lasts one hour you have limited time to build climate but you must do something. In view of the time constraint I advised the participants to:

- Create the physical climate in the room. Try to have natural light and fresh air if possible. Have chairs only or small round tables, not U shape or large solid tables; these make barriers. Perhaps put some inspiring quotes on the wall and play music (Beethoven's Ninth Symphony or lively Mozart is often popular). I also put anti stress toys in the room for people to fiddle with if they wish
- Begin to set the mental climate by shaking hands with attendees when they enter the room or space
- Explain the purpose and outcomes expected of the workshop, verbally and in writing on a chart to ensure clarity
- Have participants work in pairs and ask each person to speak for one minute uninterrupted on, "What's the most positive thing to happen to you in the last two years?" This discussion should change your delegates' mindset, enhance their mood and encourage listening.
  - Other topics you might suggest include: favourite holiday / book / film / hobby. With less time, have them write ten things they are glad to have in their life (these are not shared)
- Introductions take too long in a short workshop. Provide attendees with a list of participant names and company / job titles and ask them to say hello to each other during exercises, due to time constraints
- Ask participants, "What is your hope for this workshop?" and have them write the answer and their name on a Post It note.
  - Display these on a flipchart. Use them to guide what you do or be frank if you cannot meet one

Explain a few behavioural guidelines for the workshop (e.g. to not take calls in the room) and ask them for agreement

Have a Participative and Interesting approach

Once you have created the climate, to encourage participation, you must involve and interest people:

- Keep your topic introduction time down. Use one to three short slides at most or prepare slides attendees can read and ask you questions about. Too many slides will often bore them

- Avoid whole group discussion; only a few people will have time to talk, usually the loudest. If it must be the whole group, ask each to speak and limit the time per individual to thirty seconds or one minute
- Break the group in to small teams to answer each question you ask
- Vary the size of the small teams for each exercise or question answered (individual, paired, threes)
- Mix the teams after each question
- For each exercise, give every person a written brief that explains the purpose, the input (the question), what they must do and the time allowed (the process) and a template of the output for them to complete. This will increase the chance of gaining the output you require
- Alter the process for each question (e.g. make the output different, use flipcharts, use paper, use checklists, have them vote, stand up, sit down etc.)

Work in and outside if possible

Speed things by asking small teams different questions and share the output with other teams (useful if a large group)

Use open or closed questions as needed

Have them share their output with another team or if time permits, the whole group

Asking, "Has anybody any questions?" often leads to no response. Instead, split the group in to threes and have each team devise and ask you, one question

If each team is exploring a list, have them start at different points to ensure they cover them all. E.g. a team starts at the bottom and works up, another starts at the beginning and works down

If the answer to your question might be sensitive (e.g. competitive), have individuals write the answer and place it in an envelope for you

Develop Facilitator Confidence

To build confidence you need to overcome concerns. To elicit these concerns I ran an "ad lib" session in the development workshop and asked each person in the group to put their three key concerns on Post It Notes. Next, I answered them or referred to examples in the workshop so far. I list here the concerns, typical of many new facilitators, the first I have already answered:

- How to get people to participate in the workshop?
- How to grab their attention from the start?
- How to make sure they understand the workshop subject / goal?
- How to address the right message?
- How to get feedback on the topic?

Concerns I have yet to answer are:

How to summarise at the end?

I suggest you summarise after each question unless it is easier at the end. Alternatively, have the customers summarise.

Some ways you might have them do this are:

- Have them sum up in a tweet length message (provide them with a template so you can capture it easily)
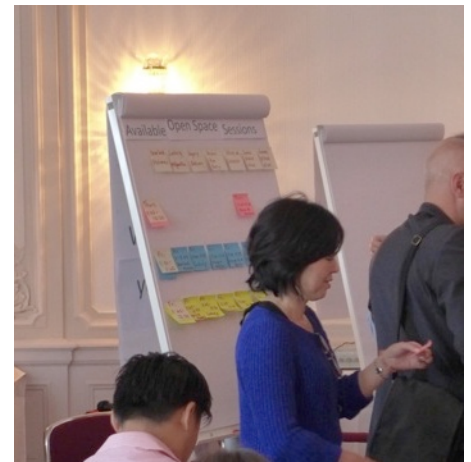
- Have them write it up in magazine cover sub headings (have an example to hand)
- Have them sum it up like an article summary
- Have them storyboard it
- Have each person summarise to a partner and swap partners to summarise again
- Have them write or draw a summary in their own format and hand it to you

How to validate / invalidate mutual assumptions?

If assumptions are important, prepare your assumptions about the topic in advance and share these. Ask the group if they consider your assumptions to be correct and if they would add any.

What if I don't meet audience expectations?

The audience expects that you will respect their time and you will keep them interested. If you use the tips in this document, you will achieve both.

Avoid being viewed as the "expert"; in this workshop you are facilitating the capture of information. If possible, have a colleague to answer content questions.

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How to move to another topic smartly if this topic looks irrelevant?

If a topic is not gaining interest, close it down as quickly as possible. Ask the group to vote if they think it worth continuing or if they would prefer to move to another topic. Empower them by giving choice.

How to avoid embarrassing questions from the audience?

Most embarrassing questions arise when people are not sure why they are in the session or what they have to do.

Ensure you provide them with a written purpose and outcomes (on a chart is sufficient) and a briefing sheet for each question / exercise unless very simple (show the Purpose, Outcome, Input, Process and Output).

How to get feedback on the topic?

A large group and minimal time, limits discussion. If you want to ensure discussion, break the group in to small teams. If it is a closed question and you want simple feedback, consider simple voting or checklists. To make this activity more interesting, have people explain why they chose one option over another.

How to move the audience in the direction you wish?

This point concerns the difference between a manipulator and a facilitator. As an observer, I would question the purpose of running a fact finding session if all you are seeking to do is manipulate the answer. Instead, present your solution and don't seek feedback. Manipulation is easy to observe and creates cynicism quickly. Cynical clients can soon be ex clients.

Other considerations

Co-coordinating your workshops

If clients are to attend different workshops during the event, run by different facilitators, prepare and compare outlines for each workshop. This will help you avoid all using the same exercises, icebreakers, team splitting devices etc. Whilst doing this, review your workshop design with colleagues to ensure that it makes sense to them.

How to deal with difficult people

Unusually, this was not raised as a concern during my development workshop. In my experience people become difficult when they are not treated correctly. If you follow the guidelines above you will dramatically reduce the potential for people to become difficult.

Preparation

Even though I have been a professional facilitator for fourteen years, I still prepare thoroughly for each session I do. Check you have all of the input material; check the room and the physical equipment like flipcharts and pens; run through your plan a couple of times.

Conclusion

Based on what they had learned about the climate, the approach and how to overcome their concerns, the group set about redesigning their sessions. They left the room with a new plan for their session and feeling confident about running it. We have since run training and design coaching sessions in the following two years. It was pleasing to see some of the attendees from previous years attending to refresh their memories.

Outcome

After the event I received the following feedback from the Director:

"The client workshops have been a real success. The team has done an amazing job. All customers found the new format very valuable and are now requesting a proper follow-up on the work that has been done. I think that customers appreciated a lot being involved in designing the future of our solutions. Thank you again for the great training you ran that enabled such an achievement."

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