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Chapter Two

The Meeting Canoe

We meet because people holding different jobs have to cooperate to get a specific task done. We meet because the knowledge and experience needed in a specific situation are not available in one head, but have to be pieced together out of the knowledge and experience of several people.

—Peter Drucker

You've already seen us refer to the Meeting Canoe as a system. This is a great time for us to tell you why we use that language.

The Meeting Canoe (Axelrod et al. 2004) is a complete rethinking of the meeting design, execution, and follow-up; it frames meetings as the factory floor for knowledge workers. Can you imagine getting substantial work done during meetings? It can and does happen in organizations that use the Meeting Canoe. Let's unpack that "system" claim. The Meeting Canoe is a system because

- The Meeting Canoe's parts influence each other. How connected people feel directly impacts how people understand the way things are, their ability to dream about the future, and the decisions they make.
- The Meeting Canoe interacts with its environment as the crew adapts to changing conditions.
- No single part is effective without the other parts.
- How well the Meeting Canoe functions depends on how well the parts work together.

Compare the Meeting Canoe with another water vehicle: a wooden raft. As a young Girl Scout, Emily and her fellow scouts made wooden rafts by lashing logs together and then climbed aboard for a lazy drift down the Cape Fear River. Drifting along without a care in the world on a hot, steamy day, Emily and her friends found that scouting for water moccasins, alligators, and the occasional dragonfly made for a great summer. A wooden raft is fine for drifting along when you don't care where you are going and time is no object. Contrast this with a canoe, where you care where you are going, time matters, and your crew controls the direction. We think too many meetings are rafts when they could be canoes.

Using the Meeting Canoe system, you can truly transform meetings, not just tweak them. It is one thing to opine that everyone in the room has responsibility for the outcome, but it's something else completely to structure and run a meeting entirely on that basis and give participants specific instructions about their role in meetings.

The Meeting Canoe (fig. 2.1) gives order, shape, and flow to your meetings. It represents a conversation that opens and closes. It starts at its narrowest part by *welcoming* people into the meeting and then *connects people to each other and the task*. As the conversation widens, so does the Meeting Canoe. It helps people *discover the way things are* and *elicits their dreams for the future*. At this point, you are at the widest part of the canoe. When you know the way things are and the future you want to create, the most possibilities exist. The approach



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supports effective *decision making*. As you make decisions, you abandon some alternatives, narrowing the conversation and at the same time allowing new possibilities to emerge for how to implement your decisions. The Meeting Canoe narrows further as you *attend to the end* so that everyone is clear about what you have all decided and learned from the meeting experience.

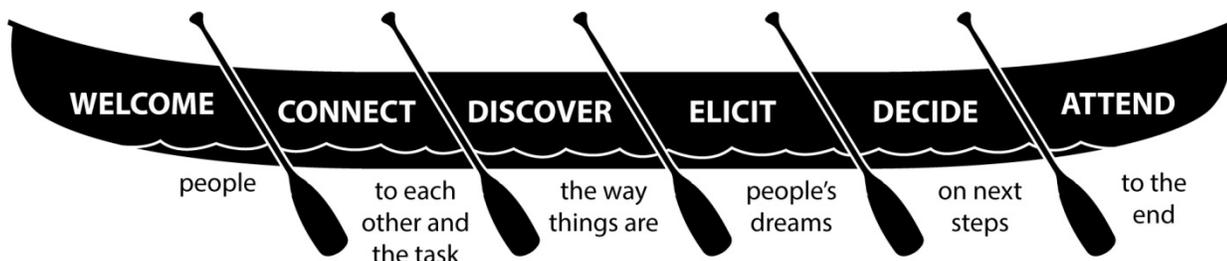


Figure 2.1 Parts of the Meeting Canoe

The Meeting Canoe consists of six parts. They are

- *Welcome people*. In this part, you greet people and begin to create an atmosphere that is conducive to doing the meeting's work.
- *Connect people to each other and the task*. The goal here is to create two levels of connection. The first level is building relationships between meeting participants. The second level is connecting meeting participants to the task at hand.
- *Discover the way things are*. In this part, you engage people in learning for themselves about the current situation.
- *Elicit people's dreams*: The goal here is to have participants imagine their preferred future unencumbered by current reality.
- *Decide*. In this part, people make decisions about what they want to do based on the way things are and their dreams, in accordance with the decision-making process identified prior to the meeting.
- *Attend to the end*. The goal here is to bring closure to the meeting by reviewing the decisions made, identifying the next steps, and reflecting on the meeting process.

The Meeting Canoe brought to you by hundreds of learners, a smart ski instructor, and Fortune 100 companies

Imagine this: you've just paid \$525 for a private ski lesson and you are standing at the base of the mountain with your instructor, ready to go. It's ten degrees Fahrenheit, the wind is howling, and the clock is ticking. In front of you stands a big guy with a scraggly beard who looks more like a river raft guide (which he is as well) than a ski instructor.



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Dave starts the lesson by welcoming you to the Breckenridge Ski School and asking you how long you've been skiing, where you are from, and how long you will be in Breckenridge. Next he seamlessly shifts the conversation to your current abilities, what you do well, and what you'd like to be able to do better. Soon the conversation moves to what you hope to accomplish, not just in today's lesson. Dave is soon formulating a plan for your development.

Do you feel that your time is being wasted? No, you feel that you are no longer just another skier going through the lesson mill. You are the recipient of a custom-designed ski lesson. Soon you are off, gliding down the slopes, learning gems that take your skiing to a whole new level, and having the time of your life. Three hours later, Dave takes the time to review with you what you have learned and provides you with a plan for applying today's lesson.

By applying the Meeting Canoe approach, our ski instructor, Dave, went from being a frequently requested ski instructor to being the number-one-ranked ski instructor at Breckenridge. Seeing Dave's success, his envious buddies asked what his secret was. Dave, being the kind soul that he is, taught them the Meeting Canoe approach, which allowed his buddies to rise in the rankings as well. This is important because ski instructors' pay increases when people specifically request them. In this case, Dave wins because he gets more pay plus satisfied clients who not only come back but also refer him to their friends. The company wins because it gets more revenue and more satisfied customers. Most importantly, the clients win because they become better skiers.

Prior to using the Meeting Canoe, Dave would have a cursory chat with a student prior to embarking on a lesson. Once he started using the Meeting Canoe system, he would spend time welcoming the student and connecting with the student prior to the start of the lesson. He would help the student discover the way things are by doing a skill assessment and talk with the student about what he or she hoped to accomplish—the *student's* dreams. Together they would decide on a plan for the lesson. Following the lesson, instead of saying a quick thank-you, Dave would attend to the end by reviewing the lesson and offering further suggestions for cementing the lesson.

An unintended consequence of our teaching the Meeting Canoe approach for large-scale change was that people picked it up and began to use it to frame ordinary meetings. The most surprising learning came from the guy you just met, our son Dave. At the time, Dave was a professional ski instructor in Breckenridge, Colorado. One day Emily was talking with him and he said, "You know that Meeting Canoe that you and Dad developed? Well, I've been using it as a system for conducting my ski lessons." And now you know the rest of the story.

The Meeting Canoe guides your conversations

The Meeting Canoe template represents a conversation a group has during the course of a meeting, no matter the length. The conversation starts with the welcome. A good welcome helps people make the transition from the world outside the meeting to the world inside the meeting. It's similar to the entryway in your house or apartment that helps people make the transition from the outside world into your home. We spend time creating a welcoming environment because productive meetings are rooted in safety. Creating a safe-enough



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environment to do the meeting's work begins with a good welcome.

Having created a welcoming environment, you next connect people to each other and the task. This is important on two levels. Personal connection builds the trust necessary to do the work, and connection to the task unleashes energy. These first two sections of the Meeting Canoe—welcome and connect people to each other and the task—build the foundation for effective work during the meeting (Lieberman 2013).

Next you discover the way things are. This is the first action step. Meeting participants come to the meeting with varying understandings of the reality they are addressing. In this step, they build a shared understanding of the reality they are facing.

When you elicit people's dreams, you ask meeting participants to imagine their preferred future. In this step, you conceive of a future worth having. Opportunities emerge that were not present before.

These two parts of the conversation, discover the way things are and elicit people's dreams, contain great power. That is why they represent the widest part of the Meeting Canoe. At the widest point, the most options are present. When you are clear about the way things are and you are clear about the future you want to create, you literally see things you didn't see before (Fritz 1999).

Have you ever noticed that when you are about to purchase a new car, you see the car you would like to purchase everywhere? Those cars have always been out there. However, when you are clear about the way things are—your car no longer works or you are tired of your current car, and you know that you want a new car—your brain lets in new information. That is why you see the car you want to purchase everywhere.

Spending time discovering the way things are and eliciting people's dreams provides a rich menu of choices for the group. Rushing these two steps shortchanges the group. Spending too much time wears the group down. If you focus only on discovering the way things are, the group loses energy because the task seems overwhelming. If you focus only on your dreams, it is easy to become Pollyannaish. Energy builds toward completion when you are clear about the way things are and you know the future you want to create.

Having created a rich menu of possibilities, you must now decide. There are many ways to make decisions in groups. We'll talk more about this in chapter 7. The most important point about this part of the conversation is to be clear about the decision-making method you will use. Nothing is worse in a meeting than to think you were participating in a group decision-making process and then find out that the decision was predetermined.

When the group makes a decision, it reaches a fork in the road. The act of deciding eliminates some options and opens up other options for how you will implement the decision you have reached.

The last stage of the conversation is to attend to the end. Many meetings rush or overlook this part. A good ending is a new beginning. It builds energy for future actions. Attending to the end gives people a clear understanding of the decisions reached and identifies next steps, thus serving as a springboard for the future.

Working your way from the front to the back of the Meeting Canoe

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As you work your way from welcome to attend to the end in the Meeting Canoe, it is important to realize that what you do in one section of the Meeting Canoe impacts the others. For example, when people enter the meeting and experience your welcome, that experience becomes the input for the next section. What happens when you connect people to each other and the task becomes the input for discovering the way things are. In each section, you are working with content issues and emotional issues. So what you discuss and your experience discussing it directly impact what happens in the next section of the canoe.

Figure 2.2 gives you a visual of the process, which is summarized below.

- Inputs are the state in which people arrive at a section of the Meeting Canoe.
- Conversations are interactions that take place during the meeting.
- Outputs are your results.

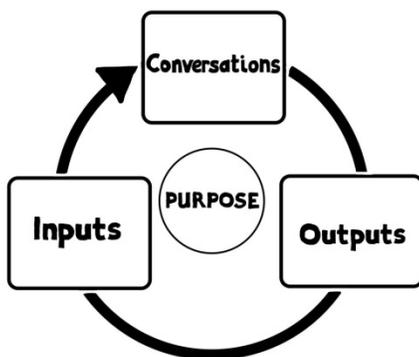


Figure 2.2 Inputs/Outputs

The Meeting Canoe works in very different situations

In chapter 1, we identified the different ways people meet—everything from informal chats to formal work sessions. Tables 2.1 through 2.5 show you how these different meetings might look when you apply the Meeting Canoe system.

Chats and huddles

Chats and huddles (tables 2.1 and 2.2) are informal. In these cases, the Meeting Canoe runs as background in your mind as you participate in these conversations.



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Table 2.1 Chat

<i>Welcome</i>	Offer a simple Greeting.
<i>Connect people to each other and the task</i>	Share what's on your mind.
<i>Discover the way things are</i>	Listen to the other person.
<i>Elicit people's dreams</i>	Talk about what you would like to have happen. Ask the other person what he or she would like to have happen.
<i>Decide</i>	Agree on further actions to take if.
<i>Attend to the end</i>	Say good-bye and thank the other person for listening.

Table 2.2 Huddle

<i>Welcome</i>	Greet newcomers and explain how the huddle works.
<i>Connect people to each other and the task</i>	Share the huddle's purpose.
<i>Discover the way things are</i>	Ask each person two questions: what do you plan to work on this week? What help or support do you need?
<i>Elicit people's dreams</i>	Share what you would like to have happen.
<i>Decide</i>	Agree on actions to take based on the discussion.
<i>Attend to the end</i>	Review the agreements and commitments made.

Staff meetings

Regular staff meetings benefit from the Meeting Canoe system because it provides a meeting structure (table 2.3). When you meet regularly, it's easy to get sloppy because you know people and you know the work. In these cases, many people forget about welcoming, connecting to each other and the task, and attending to the end. In our desire to get to work, we overlook our need to connect and provide closure. Using the Meeting Canoe to create your agenda helps you avoid these pitfalls. As you will learn later, it's also possible to devote individual meetings to single Meeting Canoe elements so that, over time, you cover the whole system.



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Table 2.3 Staff meeting

<i>Welcome</i>	<p>Prior to the meeting, solicit input to the meeting design and agenda from contributors.</p> <p>Be a good host or hostess and welcome people as they enter the room.</p> <p>Prepare materials and the room to support the work.</p> <p>Work at a round table wherever possible.</p>
<i>Connect people to each other and the task</i>	<p>Ask participants to discuss: When it comes to this meeting's purpose, what do you care about and why? Or what will success at this meeting require of you?</p>
<i>Discover the way things are</i>	<p>Depending on the agenda item and/or participant, share information or engage in dialogue to understand the current state.</p> <p>Ask contributors to do research prior to the meeting and share their results during the meeting.</p>
<i>Elicit people's dreams</i>	<p>Discuss what you would like to create as a result of participating in this meeting or what you would like to create as a result of discussing a particular agenda item.</p>
<i>Decide</i>	<p>Agree on actions to take based on the issues and decision-making process identified prior to the start of the meeting.</p>
<i>Attend to the end</i>	<p>Review the decisions and commitments made.</p> <p>Review everyone's roles going forward.</p> <p>Create your road map for going forward.</p> <p>Discuss whether this meeting was time well spent: How can we strengthen those things that contributed to making this meeting time well spent? What do we need to do differently?</p>

Town halls

Many organizations use town hall meetings as a way for leaders to interact with organization members and share information and dialogue about current issues. While well intended, many town halls become one-way conversations by the leader with little time left for dialogue. Table 2.4 shows what a town hall meeting looks like when you apply the Meeting Canoe system.



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Table 2.4 Town Hall

<i>Welcome</i>	<p>Form a design team made up of a microcosm of the participants to help you design the town hall.</p> <p>Be a good host or hostess and welcome people as they enter the room.</p> <p>Prepare materials, technology, and the room to support the work.</p> <p>Make microphones available so that everyone can be heard.</p> <p>Work at round tables wherever possible.</p>
<i>Connect people to each other and the task</i>	<p>Ask participants to discuss, What question or concern do you bring to this meeting that needs to be addressed?</p> <p>Clarify the meeting's purpose and identify key topics you will discuss.</p>
<i>Discover the way things are</i>	<p>Present information to the group.</p> <p>Ask participants, What did you hear? What do you want to know more about?</p>
<i>Elicit people's dreams</i>	<p>Discuss what you would like to create as a result of participating in this meeting.</p>
<i>Decide</i>	<p>Agree on actions to take based on the issues and decision-making process identified prior to the start of the meeting.</p>
<i>Attend to the end</i>	<p>Review key points from the meeting.</p> <p>Identify the road map for going forward.</p> <p>Discuss whether this meeting was time well spent. How can we strengthen those things that contributed to making this meeting time well spent? What do we need to do differently?</p>

Work sessions

Increasingly, organizations bring important stakeholders together from within and outside the organization to address critical business issues. In these sessions, people from all levels of the organization work together to improve processes and design new products and services. For-profit and not-for-profit organizations use work sessions to create their preferred future. Standard work sessions go by the names of Future Search, Open Space, Whole-Scale Change, the Appreciative Inquiry Summit, and Liftoff. The Meeting Canoe system works with them all giving you a way to custom design your work session without holding you prisoner of a specific methodology.



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How a Fortune 100 company uses the Meeting Canoe to integrate different methodologies

John Bader, the leader of a customer enterprise services organization, had a problem. He was determined to deeply involve his six thousand people in redesigning the organization to improve efficiency and customer service. He also wanted to use what on the surface seemed like two competing concepts: Jay Galbraith's Star Model and Judith Katz and Fred Miller's Inclusion Model (Galbraith 2005; Miller and Katz 2002). His consultants were telling him he needed a two-and-a-half-day process to do the design work. That was unacceptable to John. John asked his design team to create a one-day process that would accomplish his goals. Using the Meeting Canoe as their template, John's design team was able to create a one-day process that was delivered in eighteen different locations. The result: John estimates his return on investment for this work to be in excess of fifteen times, and his organization is providing superior customer service (Bader 2009).

John's group did not have the benefit of this book, nor were the members formally trained in the Meeting Canoe. They had just heard about the model.

How the Meeting Canoe accelerates change

When you walk into the organizational effectiveness (OE) group offices at this same company, what stands out are the meeting rooms. Floor-to-ceiling whiteboards are covered with work in progress. Writing from red, black, blue, and green dry erase markers covers the walls, and in some rooms you will find a hand-drawn Meeting Canoe sketch. "Having the Meeting Canoe graphic on the wall helps keep us on track during meetings. The shape lets us know where we are in the meeting and how much time we should be spending in each part of the canoe. The Meeting Canoe gives us a common language when we are working with each other," reports Angie Keister, organizational effectiveness consultant.

We are used to driving communications from top to bottom and expecting people to get it. Recently, a senior leadership team asked us to design a day-and-a-half meeting for the top leaders of the organization. Frontline leaders were to attend a similar session one week later. In all, four hundred people were to attend the first two sessions, and fifteen hundred people needed to receive this important information. When Kim Gallagher Johnson [OE group director] and I met to plan this work, the Meeting Canoe was top of mind. It didn't matter if we were conducting a planning meeting with senior executives or a workshop with frontline leaders. We even taught the walkthru design team the Meeting Canoe approach. In turn, they used it to design their local sessions.

Our leaders readily take to the Meeting Canoe because it is so easy to understand. We were able to transform a top-down process into a high-engagement set of activities. Along the way, our leaders learned a new way to design and conduct productive meetings" (Keister 2013).

Just think what you might be able to accomplish.

Work sessions are longer workshop-live sessions designed to address a specific issue. Table 2.5 applies the Meeting Canoe to work sessions.



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Table 2.5 Work session

<i>Welcome</i>	<p>Form a design team made up of a microcosm of the participants to help you design the work session.</p> <p>Be a good host or hostess and welcome people as they enter the room.</p> <p>If there is assigned seating, help people find their seats.</p> <p>Prepare materials, technology, and the room to support the work.</p> <p>Make microphones available so that everyone can be heard.</p> <p>Work at round tables wherever possible.</p> <p>Create a welcoming environment by working in a room with natural light and providing healthy snacks.</p>
<i>Connect people to each other and the task</i>	<p>Identify the meeting's purpose.</p> <p>Ask participants to discuss any of these questions:</p> <p>Why did you say yes to attending this meeting?</p> <p>What strength or gift do you bring to this meeting?</p> <p>What are your hopes or fears about this meeting?</p> <p>What will success require of you in this meeting?</p> <p>What is important to you about the topic being discussed and why?</p>
<i>Discover the way things are</i>	<p>Ask participants to teach each other about what their function does and how it works.</p> <p>Use panel discussions.</p> <p>Ask participants to conduct interviews prior to the session and share results during the session.</p>
<i>Elicit people's dreams</i>	<p>Discuss what is important to you about the topic at hand.</p> <p>Talk about the future as if it were the present.</p> <p>Use the arts to engage the right side of the brain.</p> <p>Build in breaks and times for reflection so that insights can emerge.</p>
<i>Decide</i>	<p>Agree on actions to take based on the issues and decision-making process identified prior to the start of the work session.</p> <p>Identify <i>who</i> you will make the decisions, and <i>what</i> you will be deciding.</p>



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<i>Attend to the end</i>	<p>Review the decisions and commitments made.</p> <p>Review participants' respective roles going forward.</p> <p>Create your road map for going forward.</p> <p>Ask for simple commitments: What can you do to move the process forward during the next thirty days?</p> <p>Discuss whether this meeting was time well spent: How can we strengthen those things that contributed to making this meeting time well spent? What do we need to do differently?</p>
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Why, how, and when a global media conglomerate uses the Meeting Canoe

"The more you use the Meeting Canoe, the more you understand its power," says Chuck Mallue, Manager of Organization Development. "We started out by using the Meeting Canoe as a design template for work sessions, meetings that can run anywhere from two hours to several days. Now the approach even influences everyday meetings."

Here are four reasons why, in Chuck's own words:

1. *Our leaders recognize a good meeting when they see it.* People approach meeting effectiveness thinking about agendas, time management, norms, and ground rules. These are all meeting elements, but they're all very tactical and short-term. The Meeting Canoe gives you a set of meeting design principles that provide a holistic system. Meeting planners design agendas. When you work with the Meeting Canoe, you design a complete experience.
2. *Innovation and creativity are hallmarks of our organization.* We try to be creative, we try to be innovative, we tell stories; we use the Meeting Canoe because it fits our culture. The Meeting Canoe image, its simplicity and smooth flow, make sense to us. People get it. They can apply it immediately.
3. *The Meeting Canoe has changed the way we design virtual meetings so they're more like face-to-face meetings.* The problem with virtual meetings is you're missing the personal, authentic, visceral experience that happens when you meet with somebody using all your senses. It's so much more difficult to understand what is going on with people when you meet virtually. The Meeting Canoe forces you to make sure you're paying proper attention to each stage of the meeting.
4. *These virtual or in-person gatherings connect people around the globe and are an expensive proposition.* Periodically, we need to bring people together to think about what is going on today and what is happening in the world. Whether we meet virtually or in person, for two hours or several days, there is work to do and people need to feel productive doing it. You have to get the design right. That happens when we use the Meeting Canoe (Mallue 2013).

How does Chuck use it?

Some work sessions are local and some are global. We use the Meeting Canoe to design work sessions for creating new organizations and to address a variety of business issues.



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When I'm working with an HR partner to design a work session, we talk explicitly about each element of the Meeting Canoe as we go through the design process. If I'm working with line clients, it's fifty-fifty as to whether we talk explicitly about the canoe. If they like metaphors, are creative, and are visually oriented, it's easy to talk them through the canoe and even draw it for them. I'll say, "Hey, this is how we're thinking about the major elements of this work and how the sequence might be."

If they're a little less oriented toward metaphors and graphics, then the Meeting Canoe becomes a conversation checklist that identifies the things we want to consider to make sure everybody's comfortable and engaged in the work. Some of our internal clients never know we are using the Meeting Canoe. What they do know is that their meetings are better when they work with us.

When does he use it?

The funny thing is that once you get this model in your head, you begin to apply it to everyday meetings as well. You may not apply all the elements in every meeting. You might spend a meeting connecting people to each other and the task or discovering the way things are. But over time, you cover the whole canoe. (Mallue 2013)

Just put your canoe in the water and start paddling. That's Chuck's advice.

In the coming pages, you will learn how the Meeting Canoe's components work as we devote a chapter to each canoe element. See you there.

Key points

- The Meeting Canoe is a *system*, a complete rethinking of the design, execution, and follow-up of meetings.
- By using the Meeting Canoe, leaders, contributors, and facilitators can truly transform meetings, not just tweak them.
- The Meeting Canoe provides an easy-to-understand structure for running meetings where everyone feels responsible for the outcomes.

Make it your own

- Using the Meeting Canoe system, analyze the really good and really bad meetings you attend.
- Identify how the Meeting Canoe supports meeting effectiveness.
- Identify how the absence of the Meeting Canoe hinders meeting effectiveness.
- Use the Meeting Canoe system to design an upcoming meeting.
- Use the Meeting Canoe system as you prepare for an important conversation or meeting presentation.