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General Session Excellence:

Driving Home Content & Improving Buy-In from Walk-In to Wrap-Up

ON MEETINGS

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Contents

Introduction

Large meetings—whether user-group conferences, sales kickoffs, or general meetings—have at least one thing in common: a very large roomful of people. The size, visibility, and strategic importance of these meetings present high stakes not only for the organization but for the individual meeting owners. When meetings succeed or fail, they do so publicly. Careers may be launched, fortified, or lost as the result of a meeting.

The purpose of this white paper is to provide ideas, strategies, and guidelines to help make your next big meeting a big win. Although most meetings have multiple components that figure importantly in their success, such as registration, venue selection, breakouts, networking, and social events, this paper focuses primarily on the elements that make for an effective General Session.

In any large meeting, the General Session, or plenary, provides an anchoring function. It gives companies the opportunity to clearly establish for the audience the meeting theme, tone, and objectives. Attendees are better able to relax when they know (early on) what to expect of the meeting and what is expected of them. The General Session becomes their foundation and reference for any subsequent breakouts or post events.

It is within the General Session that any number of core purposes are met: introducing a corporate vision, positioning new leadership, celebrating a brand, recognizing high achievers, motivating and educating attendees, launching products, strengthening a team, or encouraging a spirit of community. This white paper explores ways to maximize the impact of the General Session as a platform for these or other objectives.

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Discovering the Content

In meetings of any size, from boardroom to ballroom, content is everything. "Content," in the broadest sense, is every idea and message communicated at the event. Two needs drive content design: the needs of the meeting owners and the needs of the attendees. And a process of discovery is required for each.

An attendee survey sent out months before the meeting to the entire audience (or a representative sampling) can yield useful information while sending the message that the organization values their input. Open-ended questions such as "What specific topics or issues would you like the meeting to address?" can be mixed with narrower questions that ask attendees to numerically rate the importance of various options, such as "On a scale of 1 to 5, how important is a corporate partnerships update segment?"

An analysis of the data from these surveys brings the audience needs into sharp focus for the content design team. The team can then share the findings with key stakeholders and senior management and begin a discovery process to determine their expectations, key messages, and goals for the meeting.

Once the needs of the audience and the leaders are understood, both inform the creation of the meeting objectives. The answers to questions such as those below determine how relevant the objectives actually are:

- What is the purpose of the meeting?
- What are the key messages?
- What do attendees need to understand and do as a result of the meeting?
- How do we want the attendees to feel? What tone best serves the meeting objectives? *(A bad sales year, for example, could warrant a more serious tone.)*
- How will we know the meeting objectives have been met?

Clear meeting and content objectives pave the way for the next step, theme development.

Developing the Theme

Every meeting needs a theme. And a theme is more than a catchy title. Themes have three chief purposes:

- **The theme provides a kind of "idea umbrella" under which every targeted topic and message for the meeting can comfortably fit.** A module on customer service skills, for example, would not belong in "Driving Innovations in Technology." The theme sets boundaries on content to keep the attention focused on what is most important.

> Just as the content determines the theme, the theme drives the look and feel of the meeting.

- **The theme establishes the meeting intent and sets attendee expectations.** Therefore, it should create a value proposition for the attendees, answering the fundamental question "Why should I invest my time and money in attending this?" This is especially important for user group meetings, though even for internal audiences the theme should rally the troops. Themes such as "Conquering New Frontiers" promises an aspirational focus; "Today, Tomorrow, Together" telegraphs a teamwork emphasis; "We Are One Voice" hints at synthesis; and "Be the Brand!" asks for no small commitment. Many sales meetings themes simply use the name of the current or planned sales campaign.
- **Just as the content determines the theme, the theme drives the look and feel of the meeting** invitations, slide templates, AV, set design, guest speaker selections, audience activities, and sometimes even the choice of venue (a planetarium might be a better choice for "Destination: Outer Limits" than the local airport hotel). For the meeting to look cohesive, these components must be designed with the theme in mind, not shoehorned into it.

> Thrust and in-the-round seating can offer an intimacy in that they more closely "pull in" speaker and audience while enabling audience members to see each other's faces.

Designing the Spatial Relationships

To the degree that the amount of space between presenters and audience *communicates something about these relationships*, seating arrangements should be considered for their impact on the meeting message itself. The traditional proscenium stage positions the speaker on a raised stage where he or she faces the audience. Contrast this formal effect with theatre-in-the-round seating, in which the speaker is surrounded by the audience.

In in-the-round formats speakers, being viewed from all sides, cannot be bound to a lectern; as a result, they must stay physically open to the audience. Another format, known as a thrust stage, has the audience surrounding three-quarters of the stage. Thrust and in-the-round seating can offer an intimacy in that they more closely "pull in" speaker and audience while enabling audience members to see each other's faces. Presenters in these formats make their entrances and exits through the aisles, which can subtly convey the democratic message "We're all on the same level" or "We're all coming from the same place."

> There may be value too in giving credible-but-less-high-profile employees the opportunity to present; their perspectives can lend freshness and authenticity in meetings loaded with heavyweights.

Designing the General Session

Where meeting planners are in charge of the venue, logistics, registration, and other nuts and bolts, content designers are the champions and watchdogs of all ideas, messages, and information communicated in the meeting. The role may be assigned to one person, though typically it is a small team of people who carry it out.

Upon completion of the content discovery process, on-the-ball content designers waste no time creating the meeting agenda. The agenda identifies the topics and deliverables that the General Session must cover in order to meet the objectives. It provides the basis for all decisions regarding the following:

Internal Speaker Selection. In any organization, the most obvious choices for presenters are those who are most closely associated with the agenda topic, such as VPs, department heads, or subject-matter experts. (But when the individuals most qualified to speak are not the most compelling presenters, coaching is a must.) There may be value too in giving credible-but-less-high-profile employees the opportunity to present; their perspectives can lend freshness and authenticity in meetings loaded with heavyweights.

Meeting themes that connect to a social cause can attract high-profile speakers connected to those causes who are willing to lend their voice in support.

Guest Speaker Selection. The right guest speakers offer outside perspectives as well as validation to the host company. In contrast to speakers who bring turnkey speeches, the best guest speakers take time to learn about the host company and its meeting goals and customize their remarks accordingly. Even so, it's best not to count on the speaker to do that. A guest speaker should be preceded or followed by a presenter who "connects the dots" for the audience. How does the guest speaker's topic mirror the company's goals and values or the everyday concerns of the attendees?

Meeting themes that connect to a social cause can attract high-profile speakers connected to those causes who are willing to lend their voice in support (and a fee, of course). Their involvement may create a useful association between their brand and that of the meeting hosts. Celebrity speakers can add glamour and excitement to an event, but star power alone will not provide ROI unless the remarks are relevant to the needs of the meeting's owners and audience.

Structure. No matter its size, every meeting benefits from a strong opening and a rousing close or call to action. Designing the path between those two points requires strategy, creativity, and empathy. What will build meeting momentum? How much time is sufficient per presentation topic? Whose presentation can most effectively set up the CEO's remarks? How can we quickly reengage the audience when they return from breaks? What will help attendees retain the information? Where will the audience need a laugh? What format options will help break up the sameness of the presentations?

Content-delivery options. The audience's attention span is something best left untested. No presentation, no matter how important its content, should exceed 15 minutes—and 7–10 minutes is ideal. The longer the General Session is, the more an audience will welcome variations in presentation format (a succession of "and our next speaker is …" gets old fast). These variations could include:

- **Onstage panel discussion** giving voice to multiple perspectives from within the organization and outside it, offering the added appeal of spontaneity (or at least the appearance of it!)
- **Onstage interview** with a special guest to explore relevant topics in a more conversational way
- **Audience-seated activities**, such as games or quizzes, that capture the theme and reinforce learning (more on that later)
- **Video segments** that supplement and reinforce the meeting objectives (more on that below)

Video. Video provides rich opportunities to engage the audience through customer testimonials, comments by experts or partners, sales success stories, reports from remote locations, "man-on-the-street" interviews, product demonstrations, humorous vignettes, company historical footage, entertaining movie clips, and countless other applications.

Short video "bumpers" can be used between presentations to reinforce the message just delivered, set up the next one, or provide comic relief. And because video can be edited, it offers the greatest amount of control of the message. Planned correctly, video used in the General Session can have a long second life on the company website or social media.

> Whether an annual or one-time-only award, its presentation and acceptance can add a shining moment to the General Session, inspiring attendees, strengthening the linkage between the award giver and recipient, and expanding newsfeed content.

Awards & Recognition. A standard feature of most sales meetings, awards create motivational high points in which to honor individual and collective achievements. But opportunities for recognition are not limited to sales meetings, and it is the content designers' job to identify those potential opportunities. Who in the room has demonstrated the messages and ideals the meeting is charged to communicate? Recognition can be given formally via a trophy presentation or a short video profile or through an informal shout-out.

Awards also create visibility for the organization when given to those outside the organization who demonstrate its core values. Whether an annual or one-time-only award, its presentation and acceptance can add a shining moment to the General Session, inspiring attendees, strengthening the linkage between the award giver and recipient, and expanding newsfeed content. Microfinance leader Opportunity International, for example, has given a variety of awards at its conferences recognizing entrepreneurs in the developing world, leaders of countries, and others who embody Opportunity's commitment to ending poverty.

Managing the Elephant

Even the most exuberantly themed meeting will fall flat if attendee morale is low and suspicions are high. It is challenging to rally the troops amid plummeting profits, layoffs, scandals, or ugly rumors. Clearing the air—and doing so early in the General Session—is critical for the content design, and it must be assigned to the top leader.

What is needed is a brief but frank discussion of the issue, a confirmation of the truths and dispelling of the myths, followed by an affirmation of what is being done to move forward. Without this pivotal piece of content, the audience may be unable to focus on the meeting. The opening video module at a national accounting software company user conference was once quickly followed by the CEO's taking full responsibility for the company's failure to roll out a line of promised products. Though cringing company insiders privately dubbed the event "The Apology Tour," the company demonstrated awareness and respect for its client base and, by accepting responsibility, cemented their trust. The number of complaints in the Q&A segments was significantly lower than anticipated, and feedback on the meeting was excellent.

In the 1980s, Howard Johnson held a meeting for its hundreds of franchisees. The "elephant" was the franchisees' resistance to eliminating the iconic orange roofs in a planned renovation of the chain's hotels, motels, and restaurants. The content team hired actors to write and perform a meeting opener, a short but powerful vignette that humorously and tenderly illustrated the franchisees' concerns about the changes as well as the company's position. With their feelings respectfully acknowledged, the audience was able to listen more openly to the modules that followed.

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Working with Speechwriters

Every presenter has a content prompter preference. Some feel comfortable speaking from outlines, slide notes, or bare-bone talk points. Others feel most at home reading word-for-word from a script or teleprompter. But regardless of delivery preference or speaking experience, most presenters benefit from working with a skilled writer.

The most qualified writers (alternatively known as speechwriters, presentation developers, or content producers) are proved by their abilities to write in the speaker's "voice" and bring the presentation to life through attention-getting openings, relevant examples, solid proofs, engaging stories, intriguing transitions, succinct summaries, and convincing calls to action.

The first meeting with the speaker and the writer is the lengthiest and most important. Here the writer interviews the speaker to collect his or her thoughts on presentation objectives, content, format, visuals, and more. During the interview the writer is also taking note of the speaker's communication style. How expressive is the speaker? Are there repeated turns of phrase?

It is also decided in this initial meeting whether the writer will provide a script, an outline, or talk points according to the speaker's needs. A word-for-word script is the most precise delivery method. It also offers an anchor of stability for nervous presenters and insurance against content digressions. But script-reading can also make the presenter sound mechanical or canned unless aided by a professional presentation coach.

> The right story well told has the power to illustrate the speaker's message in ways more credible and memorable than a just-the-facts approach.

A resourceful writer will use the interview to discover the speaker's stories. Most presenters enjoy telling stories as much as audiences do hearing them. Stories humanize speakers, allowing their unique life experiences and personalities to naturally emerge. The right story well told has the power to illustrate the speaker's message in ways more credible and memorable than a just-the-facts approach. Stories can win back the attention of even the most distracted texter in the audience. What listener would not be spellbound by a speaker who begins, "When my family and I were in Tuscany last October, we met a man we will never forget"?

Another benefit of hiring writers: Far too many speakers wait until the last minute to begin developing their presentations, whereas writers are accustomed to meeting deadlines. The peace of mind for meeting planners (and speakers) is invaluable.

> Speakers need time to build rapport with the coach, try out different techniques in a pressure-free environment, and review their practice sessions on video playback.

Coaching for Presenters

Speakers accountable to communicating key messages persuasively thrive when given the *support* they need to go from passable presenters to compelling communicators. Those driven to excellence never stop seeking opportunities to improve. In fact, they expect it to stay on top of their game. Who wouldn't want to look good when IMAG screens capture every wince and blink?

Presentation coaching gives speakers unbiased, objective feedback from an experienced professional. They gain skills targeted to their needs and confidence that comes from those skills. The audience, too, benefits from coached speakers, in that they feel more engaged. As a result, they are more likely to understand the message, remember it, and take action—which is the primary purpose of a meeting.

Although professional speaker coaches are hired to help presenters improve delivery (effective use of voice, body language, gestures, eye contact, etc.), they know that content comes first. When professional writers have not been involved, most of a speaker coach's time is spent trying to salvage or revise weak scripts or outlines—a process that can take hours or days. Without a well-designed presentation, it is premature to address the speaker's delivery and impact. Delivery is the clothes, but content is the bones.

Speaker coaching should be scheduled well in advance, either as a single intensive session or as multiple short ones. One-off coaching sessions on the day before the event have little effect. By that point speakers are too preoccupied with their slides or event logistics to be able to focus on changing old presentation habits. Speakers need time to build rapport with the coach, try out different techniques in a pressure-free environment, and review their practice sessions on video playback. The success of their performance (i.e., the impact of their message on the audience) depends on it.

A Brief Note About Slides

Just as the continuity of messaging must be consistent throughout each presentation, slides should have a uniform look, not just a shared template. Simplicity is key. Busy slides bog down a presentation, complicate the message, and compete with the speaker for the audience's attention. If the slide deck is to be made accessible to attendees after the meeting, a more detailed version can be created for this stand-alone purpose. For more recommendations on the effective use of visuals, please see our white paper, *Master Your Message, Maximize Your Impact*.

> The final content review is a vital opportunity to identify and resolve missed details and potential problems.

Managing Content: Final Approvals

Final approvals on presentations and slides require firm decision making: “Please cut five minutes off your speech” … “The figures on your slide 16 are not accurate” … “This part of your remarks contradicts our mission statement.” As every organization has a hierarchical structure, making those judgment calls, however tactfully, can involve occasionally stepping on the toes of the powerful—not comfortable, but essential at times to ensure the success of the meeting.

Deciding on the person(s) who will make those critical decisions should be done very early in the process. The person designated to approve content should be copied on emails between the presenter and the writer, reviewing all drafts and slides generated in the process. Any content issues can thus be flagged early rather than appearing as surprises down the road. Rarely do writers-for-hire have the clout or expertise to argue content with speakers. The writers look to the meeting’s content point person to call those shots.

The final content review is a meeting scheduled a few days, ideally, before onsite rehearsals begin. Here the content-design team, writers, slide designer, video producer, and others as needed meet to review the final scripts, slides, and videos for the General Session. All presentations are read aloud and, along with the audiovisual components, are scrutinized for errors or inconsistencies. The timing of each segment, and ultimately the entire session, can also be more accurately assessed.

The final content review is a vital opportunity to identify and resolve missed details and potential problems—instead of suffering rude awakenings onsite, with only hours or minutes to spare.

> For meetings in which attendees do not know each other, walk-in activities can also serve as icebreakers helping people to relax and connect.

Engaging and Entertaining the Attendees

One of the most creative challenges of General Session design is coming up with ways to boost audience energy and involvement—and to do so in ways that are relevant to the attendees, meeting theme, and subject matter. Here are several ideas for making the audience experience more interactive, entertaining, or both:

Walk-in Activities. Before a General Session begins, attendees are typically socializing, finding seats, checking emails, and preparing to settle in. Some meeting planners opt to keep this walk-in period free of any content, for attendees to use as they wish. Others see value in providing engagement activities, even minimally, at this point. The rule of thumb for the walk-in: if you entertain them, don’t ask too much of them.

The most successful activities at this early stage are those in which people can choose to participate, whether silently by themselves or with others seated nearby. For meetings in which attendees do not know each other, walk-in activities can also serve as icebreakers helping people to relax and connect.

Here are a few suggestions:

- **Personality Tests.** Attendees answer a series of fun questions about their preferences, such as "Which of the following animals do you most identify with?" or "Which of the following colors are you most attracted to?" The audience members then note their preferences privately (in their heads) or via an Audience Response System (ARS). An ARS enables attendees to provide feedback instantaneously through a smart phone, a tablet or a laptop. That feedback then appears in real time on-screen. The audience can see how many among them identify as foxes and love the color green, to use the above example.
- **Visual Challenges.** Heavily pixilated images appear onscreen. The audience tries to figure out what the image is before it appears moments later with full clarity. The images may be industry related or more broadly selected, such as the faces of celebrities or U.S. presidents.
- **Wild Captions Cam.** Strategically placed cameras scan the audience and randomly land on close-ups of individuals, projected onto IMAG screens. Superimposed below each face is an equally random funny caption, such as "Thought this was an Amway meeting" … "Has already had 8 cups of coffee" … "Secretly texting the competition."
- **Thoughts to Ponder.** While the audience members find their seats, a series of facts (the more surprising, the better) occasionally appear onscreen. The facts can relate to the company or industry or provide a preview of the meeting content. This activity also works well as a platform for "myth busters," in which the audience members are shown statements they must decide are true or false. ARS can be used to broadcast the results to the entire room.

Audience Center Stage. In the best scenarios the attendees are the most enthusiastic spokespersons for the company and its meeting objectives. With the availability of quality videotaping options, it has never been easier to put attendees centerstage. NextGen Healthcare Information Systems, for example, hosts its annual User Group Meeting to introduce new products and inspire a sense of community among thousands of attendees. On the evening before one such meeting, attendees were videotaped commenting on how NextGen was helping them meet their goals. Samplings of their thoughtful, upbeat sound bytes were edited overnight and used the following day throughout the General Session. The audience was delighted to see themselves on-screen, and the video reinforced NextGen's relationship as a partner with its clientele.

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Staff Vignettes. A surefire way to engage the audience is to give them the theatrical spotlight. Comedic vignettes featuring members of the audience, such as employees or members of user groups, are often big crowd pleasers whether performed live or on video. And there is no limit to subject matter. Vignettes can poke fun at the competition, portray hilariously over-the-top sales scenarios, roast a retiring executive, or take a wild guess at what the company will look like in the distant future.

Despite the light touch, vignettes are not as easy to pull off as they might look. A vignette needs:

- a creative concept that complements the theme
- smart writing
- a producer to schedule the participants, select locations, and gather any required props, costumes, or makeup
- a director to coach the performers, assist with lines requiring comic timing, and make the scenes translate effectively to stage or camera
- an editor to create the best footage from the collaboration, adding titles, music, and special effects as needed

Audience Polls. Conducting a poll is a simple low-tech way to create instant interactivity. The speaker poses a question and asks for a show of hands, asks the audience members to sit or stand in response to the question, or directs them to text their responses via ARS. Besides involving the audience, polls provide immediate data, yielding surprises or reassurances for the meeting host. However, too many polling questions can become tiresome and gimmicky.

Quizzes. An effective way to motivate audience attention is to quiz the members at the end of one or more content modules. Attendees can jot their responses on paper or ARS. To encourage friendly competition, quizzes can be coded and timed so that teams, departments, or regions vie for the highest score.

Q & A. As an alternative to a question-and-answer session at the end of the meeting, meeting hosts can invite attendees to use the Chat feature to submit their questions at key points during the meeting. To eliminate distractions for the speaker, it is recommended that others be assigned to select only the most relevant and representative questions for the speaker's attention.

Executive Reveals. An "executive reveal" introduces the top executive by staging his or her appearance in an unexpected and theatrical way. It enables the executive to take himself or herself less seriously and winds up being as much fun for him or her as it is for the audience. Here are a few examples:

> Software AG, an enterprise software company, opened its big meeting with a high-spirited video that featured its CEO and software programming team. The story line followed the CEO as he attempted to beat the clock on relaunching two flagship products. In every shot was a grunge band that accompanied the frenetic action. At the conclusion of the video, the lights came up on the grunge band, playing live onstage. A few moments later, one of the band members yanked off his stocking cap, revealing himself to be the CEO.

Davol, a seller of medical products, once opened its meeting with a spectacularly choreographed story featuring live fighting ninja warriors. A black-hooded ninja troop descended upon a lone white-hooded ninja. After an awesome gymnastic display of leaps, rolls, and thrilling stage combat, the white-hooded ninja emerged the victor. When he removed his hood, he turned out to be the CEO. (In reality, the CEO did only the end moves in the act; everything else was performed by a professional.)

In keeping with its conference theme "Ignite," Chicago-based Business Marketing Association opened its meeting with a video featuring actual firefighters in a parody of the TV show Chicago Fire. The story line led to the characters speeding away in a fire truck to an emergency at the Sheraton Hotel—the same venue as the meeting itself. The audience watched as the on-screen firefighters, now wearing gas masks, ran inside the building and then showed up live onstage. With a flourish, one of the firefighters removed his mask, walked to the podium, and began his duties as host of the meeting. The other masked firefighter remained onstage until he was revealed to be a surprise guest.

> The audience was delighted to see themselves on-screen, and the video reinforced NextGen's relationship as a partner with its clientele.

Live Demos. A live demo can add immediacy to a meeting, as well as credibility for the product or process being demonstrated. At the annual education conference of Florida-based Workers' Compensation Institute (WCI), demos of routine surgeries are streamed live to the event. Attendees can ask the on-screen physicians questions during surgery and hear their responses. WCI also features live simulations of oral arguments from actual court hearings from Florida's First District Court of Appeals.

Yet even with today's advanced technology, live demos—whether streamed or onsite—are risky. Internet connections are not always reliable. Things that worked perfectly in rehearsal can malfunction while hundreds of attendees watch. Live demos need a Plan B. Most anything that can be demo'd onstage or streamed can be prerecorded on video—a less-showy but much-safer route.

Measurement and Follow-Up

Just as audience surveys are necessary for the initial content discovery, they play an equally important role in capturing responses during and after the meeting. Measuring the success of a meeting should cover a variety of criteria, including:

- What presentations or modules did the audience respond to most favorably?
- What understandings, attitudes, or beliefs changed as a result of the meeting?
- What actions has the audience taken as a result of the meeting?
- What questions or issues did the meeting fail to address?

Ultimately, the meeting-content designers must determine how well the program delivered on the objectives defined by the results of the pre-event discovery.

To further support the meeting objectives, a dedicated attendee website can offer a channel for ongoing feedback, continuing education, suggestions for subsequent conferences, archived meeting videos and slides, and other features that keep the company and its community in conversation.

Conclusion

When the message matters, every detail affecting its presentation matters too. In this paper we have touched on the core components that lay the foundation for a powerful on-message General Session. In any industry, successful meetings reward audiences with a clarity of purpose, ideas, and direction and a sense of community in which they may collectively support the fulfillment of those objectives. There are rewards as well for the meeting-content designers, who will deserve full recognition for creating an event in which every word, image, and activity is strategic, relevant, and energizing for stakeholders on both sides of the stage.

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For more information, contact GetSynchronicity at
815.464.1252 | **GetSynchronicity.com**