

U.S. Marketing Services Decision & Meeting Facilitation

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USMS manages and facilitates company meetings where the goal is to bring groups together for productive problem/opportunity analysis and decision-making. USMS conducts these sessions on topics such as:

- Marketing Planning
- Management Team Decisions
- Definition of company strengths or product's basis of differentiation
- Idea Generation to identify new initiatives
- New Product Development opportunities
- Strategic Planning priorities
- Corporate and Business Priorities
- Team Building

Benefits of a USMS Meeting

Our clients tell us that "meetings work really well" when we facilitate and manage the process:

- Opportunities are identified; priorities are agreed upon
- Good input, decisions, and next steps are detailed in the meeting
- Information needs are identified
- Agreements and confusions are highlighted so they can be acted upon or resolved
- Problems get solved
- Lively and honest discussion takes place
- Innovative decisions are made
- Sensitive or unpleasant issues can be dealt with and handled well
- Participants feel their time is well respected and well spent
- The group forms into a more cohesive team and develops a positive, productive attitude
- Hypotheses can be articulated for later testing in research
- No one individual dominates
- The meeting stays on track
- Attendees are motivated to participate

- Excellent notes are taken real time in the session so that ideas can be referenced as the meeting continues and prompt future action can happen and no follow-up details will be missed

In most meetings we work with a "graphic recorder" who takes fast, effective, readable, usable notes on big charts during the session. She also (under Janet's guidance) develops materials and charts ahead of time for use in the meeting. The Graphic Recorder with whom we usually work is Karen Stratvert. She is referred to in the description of our process that follows.

USMS Meeting Management Process

We work with you on all facets of the meeting to contribute to a productive and successful meeting.

Before the meeting, we learn as much as possible about your business objectives, group issues, and the context for the discussions that will likely occur in the meeting. We may also interview key managers (at your discretion) to hear their perspectives on meeting goals, key issues and their opinions of a successful outcome. We can share this information with you up front, we can summarize it for the group, and we can use it to form or revise the agenda.

We plan or revise the agenda with you and provide advice on what will meet your objectives and available time.

We develop large charts (poster size and larger) to have ready to use to start quickly and well in the meeting. These include "process" information such as charts stating meeting goals, agenda, ground rules, etc. They also can (if you like) include charts of material you and other participants wish to present. The charts provide a structure and focus for the meeting and allow us to be very productive in our use of time in the session.

During the meeting we manage and facilitate the meeting itself and record all that is discussed and covered in the session.

Early the first day, Janet Beach quickly presents the agenda, meeting goals, and process guidelines at the beginning of the session (usually after you, the key manager, provides a welcome and introduction to the session).

Janet then facilitates the whole meeting, leading discussions, providing leadership for agenda topics. She also manages any time changes or other revisions to the agenda (for example, calling breaks early when participants are obviously in need of them, etc.).

Janet can also function as a *thought leader* suggesting additional ideas or challenging assumptions and teaching/coaching about business or marketing practices where relevant.

Karen Stratvert graphically records (takes notes visually) on all content of the sessions so that the flow of the discussion is captured as well as the conclusions and decisions.

Janet works with you, adapting things as we go along to be responsive to the particular dynamics of the meeting and to drive toward business decisions and "next steps" that will be actionable for your group.

After the meeting, we can create a "group memory" document that is an edited version of the content of your meeting. Usually detailed summaries of all presentations and discussions are included. (At sales or customer meetings, many groups like to create an internal version that is more extensive and an external participants version that is briefer.) Janet can write a draft of an Executive Summary for you as well for inclusion in the front of the document.