Supplement to Conferences that WORK

CREATING EVENTS THAT PEOPLE LOVE

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Introduction

Chapter One: Why did I write this supplement?

To my surprise and delight, sales of *Conferences That Work: Creating Events That People Love* have continued to rise each year since publication in 2009. In a world where last year's bestseller is often found on today's remainder pile this is welcome news, both for me and for the increasing popularity of participant-driven events.

However, this doesn't mean that I'm satisfied. Designs evolve—here's what Tim Brown of Ideo has to say on the topic:

> *Our basic ideas about design have been based on Newton, says Tim. Design assumes the ability to predict the future based on the present. We need to think more like Darwin: design as an evolutionary process. Design is more about emergence, never finished…*
> *—From a blog post by David Weinberger on a talk given by Tim Brown.*

The marketing pioneer John Wanamaker is reported to have said that half the money spent on advertising is wasted; the trouble is we don't know which half. Similarly, although there are probably fundamental principles underlying good design of human meeting process we don't know for sure what they are. (Beware anyone who claims they have a comprehensive list).

I believe that only by experimenting like scientists and artists might we possibly discover over time what works and what doesn't. My attempt in *Conferences That Work: Creating Events That People Love* to share what I learned between 1992 and 2009 about running participant-driven events is a frozen-in-time snapshot of the "best" process I knew up to the moment the ninth manuscript draft went to the printer.

I started writing this supplement within a few months of publication, and it will remain an ever-changing work as I continue to experiment and learn from every event I'm involved with.

As a recovering ex-physicist, I love Tim Brown's description of the old paradigm of design as a Newtonian knowable. Thinking of design, in this case meeting and conference design, as something that is emergent, responsive, and continually evolving is a humbling and yet wonderfully freeing lens in which to view my work.

Chapter Two: What's included?

I'm publishing this supplement to *Conferences That Work: Creating Events That People Love* as a free ebook. Fair warning: it won't make much sense unless you own the original book (hint, hint)!

I will update this ebook occasionally whenever I have the time to do so. The title page includes a version number and publication date, so you'll easily be able to check whether you have the latest version, which will always be available, together with a version history, on the Conferences That Work website.

The supplement is a quick read and I encourage you to read everything, but if your time is limited be sure to read at least the *General* and *Important improvements* chapters.

The ebook includes the following sections:

- ***General chapters*** on one-day and larger events.
- ***Important improvements*** to the book's methodology. *Everyone running Conferences That Work should incorporate these suggestions.* They will make your event better!
- ***Optional improvements***. These include additional ideas and process extensions that make organizing *Conferences That Work* easier and provide a better conference experience.
- ***Alternative approaches***. This section contains several alternative ways to run your conference that may be a better fit for your specific needs.
- ***Miscellaneous tips***. Tips that may answer problems you didn't even know you had!

Each improvement, alternative, and tip is described in a short chapter. The chapters in each section are ordered by their position in the overall event time-line: from preparing for the event through the closing sessions. When relevant, I've included page numbers that tie the new material to the appropriate section of the original book.

Chapter Three: Acknowledgements

I'd like to thank Bill Campbell, Bernie De Koven, Erik Peekel, Celia Segar, Andrea Sullivan, and Charles Thompson for their contributions towards improving *Conferences That Work*.

And I'll always be indebted to the thousands of folks who attend my conferences and organize their own. Your feedback and support continues to inform and improve my work. Thank you!

General chapters

Chapter Four: Avoid one-day peer conferences unless there's no alternative

Although I occasionally organize and facilitate one-day peer conferences, I recommend against them whenever possible, and advise you to follow my example unless there is really no alternative.

Why? Here are three reasons:

1) One-day peer conferences are always somewhat rushed. They allow little time for a crucial process component—peer session selection. Breaks between sessions are necessarily short: five to ten minutes. There's almost no time for reflection, deliberation, and relaxation. The lack of down time during the whole day makes it difficult for most people to work and interact effectively throughout the entire event.

2) There isn't enough time to hold a personal introspective at a one-day peer conference. This session provides an important bridge between the individual work, connections, and learning that have taken place and the group spective where participants' experiences are explored en masse. While it's the right session to be given up when time is short, a powerful opportunity to reinforce personal learning and change is lost.

3) There is something magical that happens when a conference includes one or more overnights. Even when participants aren't staying on site, talking late into the evening followed by sleep somehow catalyzes consolidation, clarification, and creativity in participants' brains. Over and over again I've seen a group, seemingly ragged and incoherent on the evening of the first day, show clear signs of community formation by breakfast.

This said, one-day peer conferences can be valuable, especially when compared to the alternative of holding no conference at all. But beware of making a judgment about the value and power of the *Conferences That Work* format based solely on a one-day event. Connection, peer learning, engagement, and community building take time to develop, and a single day doesn't do justice to this peer conference format.

Chapter Five: Running Conferences That Work with more than 100 participants

Since I wrote *Conferences That Work: Creating Events That People Love*, one of the most common questions I'm asked is whether the format can be used with more than one hundred participants.

I'm happy to report that the answer is yes—*given two conditions*. I'll describe the conditions first before explaining how to adopt the book's process for larger events. *Read the conditions and follow them. Ignore them at your peril*!

Condition One: Size and duration matter!

If I had a dollar for every time someone asked me to run a one-day *Conferences That Work* format event for more than a hundred attendees I'd be able to take my entire family out for an extremely nice dinner.

Sadly, you can't obtain the same intimate wonderful experience that's routinely possible with, say, fifty people in the time span of a single day. Believe me—you can't! It takes time to form relationships, and if you're surrounded by too many people in too short a time, most of those people are going to remain mysteries to you. You can't create intimacy and trust in a group situation when you have no experience of most of the people present.

Peer conferences do not scale in the same way as traditional conferences. A speaker can speak to a hundred or a thousand people (all you need is a larger room), and the attendee experience—reception of broadcast information—will be essentially the same. Peer conferences, on the other hand, are about connection, learning, engagement, and community-building, all of which are affected by the number of people present and the time available.

With more than a hundred attendees and enough time, the best you can do is to craft and support opportunities for appropriate subgroups of participants to spend useful, meaning time together.

This is harder to do successfully, compared to the tried-and-true *Conferences That Work* format. Your participants' experiences will not be the same as if there were fifty people present.

But the end result will be <u>much</u> better than a typical large event experience!

Nitty gritty constraints arising from Condition One

One-day event: As described in the book, *no more than 50 attendees*.
One-and-a-half-day event: As described in the book, *no more than 100 attendees*.
Two-day event: 100+ attendees, divided into sub-groups of 50. Before you get too excited, see below for the room resources needed for larger numbers of participants; they are much more extensive than those needed for a traditional event.

Condition Two: Segment attendees appropriately!

By "segmenting attendees" I mean dividing them up into smaller groups that typically have something additional in common besides the core interest that brought them to your conference.

In my experience, overall engagement and connection begin to decrease once you have more than about fifty people working on a single activity. (By "single activity" I mean working together as one group, rather than splitting into smaller subgroups.) Larger roundtables, for example, either take too long to maintain attention or provide insufficient time for each person to share satisfactorily.

Consequently, if more than one hundred attendees are present you will need to run three or more simultaneous roundtables (with a maximum of fifty people per roundtable).

The way that attendees are divided amongst multiple roundtables and subsequent activities can make a significant difference to their experience and the overall effectiveness of your conference. Your goal should be to provide an interesting peer group at each roundtable while keeping each group roughly the same size. There is a tradeoff between random assignment, which can lead to interesting cross-fertilization of ideas and expertise, and division by specialty, which allows close peers to find and connect with each other. Ultimately, you'll need to make this determination yourself based on the ideas below.

If your attendees have distinguishing interests, it's often best to divide them into roundtable groups that reflect these interests. For example, at a conference I designed for medical office staff, we split the five hundred attendees into ten roundtables by different office specialty and practice type (obstetrics, oncology, general practice, etc.) Because we had more than fifty attendees in some of these categories, we ran several roundtables for the more popular specialties and attendees were assigned to one of their specialty roundtables at random. If you have more distinguishing interests than roundtables, you'll need to combine multiple interests into a single roundtable. Under these circumstances, try to create groups that contain the most overlapping interests.

Avoid assigning roundtables by geographical origin. At most conferences, people prefer meeting those they consider their true peers irrespective of whether they work near each other. For example, a national association of summer camp organizations used roundtables based on geographic region. From the feedback they received, attendees would have preferred being grouped by job specialty: development staff, financial staff, board members, etc.

To help decide how to assign attendees to roundtables, consider asking a sample of registrants their opinion. If there's really no strong preference, you may decide to use a random assignment.

Once you've decided how attendees should be assigned, choose a simple scheme to name each roundtable. You can use something appropriate to the theme of the conference—for example, a Christian conference might use books of the Bible—or something abstract such as numbers or colors. Before the conference, assign each registrant to a specific roundtable and individually code badges to make roundtable assignments clear to each attendee.

What if I have a mixture of professionals and vendors attending my event?

Since I wrote the book, many meeting planners have asked me how to apply the *Conferences That Work* format to conferences with attendees who are a mix of practicing professionals with suppliers and vendors of services and products for these professionals. Sometimes there are multiple constituent sub-groups, for example: non-profits, sponsoring businesses, and agencies. As described in Chapter 25, such situations create an unavoidable tension—avoided in the Conferences That Work format by the means described on pages 282 and 286. Vendors often form a majority of attendees at these events, creating an uneasy environment for the professional minority.

As you might expect, when you include significant numbers of vendors amongst your attendees you'll rarely approach the degree of intimacy possible at *Conferences That Work* events with a single peer group. But if your conference model requires vendor registrants you'll need to determine how these groups will beneficially co-exist, balancing what are often competing needs against one another.

There's no one right answer to how to make these decisions; every situation I've experienced has been unique. Some factors to consider are:

- How can you make your conference a positive experience for every constituency?
- How can you minimize what some constituencies will see as negative components of your event?
- Do you want to provide specific groups with opportunities to spend time alone with their peers? If so, how much time and what formats will you use?
- How can you support engagement between the various constituencies attending?
- What topics/activities does it make sense to run with all registrants? (You'll want some of these, or some of your constituencies will be unhappy!)
- How can you best build community around the disparate group interests represented?

These are hard questions to answer, and you will not please everyone no matter what you do. And that's OK—because the danger of being fixated on creating an event that works for everyone, is that you are likely to end up with an event that works for no one.

How to adopt Conferences That Work for more than 100 participants
You have read and are following Conditions One and Two, right? OK, here's how to create larger Conferences That Work.

Resources needed

Before even considering using the *Conferences That Work* format for more than a hundred participants, *ensure that you will have enough suitable rooms available*.

As described in Chapter 13, pages 148-150, the peer conference format requires more rooms and larger rooms than those needed at a traditional event of the same size. If you are dividing your attendees into roundtables of fifty, *each of these will need a 50 – 80 foot square room* (see Appendix 10). A conference of 500 people, therefore, will need *ten rooms, each at least 2,500 square feet, just to hold the ten simultaneous roundtables*. That's a *lot* more space than at a conventional event, where you might seat all 500 people in a single 5,000 square feet room using theatre seating.

As well as the roundtable space—which can also, of course, be used for breakouts—you'll also need enough additional breakout rooms *located near your main rooms* (see *Oh for a golf cart* on pages 159-160). The quantity and sizes of these rooms will depend on how many discrete "mini-conferences" (see the peer sessions section below) you decide to hold.

Do the math *before* you search for an appropriate venue, and ignore what venue sales staff may tell you about their location's capacities based on conventional seating modalities. I've found that many venues are not designed to handle these kinds of space needs.

Staffing a peer conference with more than a hundred participants is another consideration. Careful attention to clear signage and providing a central staffed help desk will help avoid logistic snafus. Although I haven't seen problems finding additional volunteers, overall conference organization becomes more complicated and requires more work and coordination in advance of the event.

Finally, production support services are more critical at larger peer conferences. Registration check-in speed and efficiency becomes important, and multiple sound and video projection systems for the rooms in use are now required, rather than optional luxuries. If you have experience running larger conventional conferences, you'll know how to handle these kinds of issues. If you don't, it's a good idea to involve people who do!

Roundtables

As described above, divide your participants in advance into roughly equally sized groups of no more than fifty people, and code name badges, using colors or easily identifiable symbols, to clearly indicate each person's group.

Follow the roundtable process described on pages 256-262, replacing "two" on page 260 with the number of simultaneous roundtables you will actually be holding.

Omit the entire roundtable buddy process described on pages 262-4 and 266 and have people go to their respective roundtables once the instructions for the Three Questions have been given.

Peer session sign-up

My philosophy here is to create parallel mini-conferences for each distinctive peer group. If your peer group roundtables are distinctive groups, run separate peer session sign-ups for each group. If you have several roundtables for a specific group you can combine their members into a single peer session sign-up.

Peer sessions
Depending on the time available and the compositions of your sub-groups, you can either continue the mini-conferences in parallel or give all participants the opportunity to choose between the sessions generated in the separate sign-ups.

Personal introspective
I recommend running a single personal introspective for all participants. If you've been running multiple mini-conferences, this is an ideal time to begin to integrate the groups back into a single community. Use the small group version described in this supplement, and form small groups that are composed of people from different roundtables and constituencies.

Group spective
Unless the conference is very large and time is short, run a single group spective for the entire conference. Start with a rapid-fire plus/delta to make public a representative sample of participant experience across the event. This will also build a list of potential action items for conference members to work on. Once this list exists, have participants decide whether to work on it as a single group or to divide into working groups. In the latter case, ask for volunteer facilitators for each item, and assign and post locations for each group to meet. If appropriate, reserve time after these group sessions for participants to reassemble and provide very brief reports from each working group.

A final request for feedback
Conferences That Work events for more than a hundred participants are still relatively rare. I'd love to hear how your conference worked and lessons learned! Please share with me your experience in whatever way works for you:

- A blog post (share with the world and let me know about it!)
- An email to adrian@segar.com
- A call to (802) 254-3566 or Skype adriansegar or G+ hangout with me +Adrian Segar

Your sharing will make *Conferences That Work* better. Thank you!

Important improvements

Chapter Six: Give people permission and opportunity to take a break!

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The importance of breaks

A peer conference is an exciting, high-energy environment. When spread out over several days, it's almost impossible for anyone to maintain appropriate concentration and involvement for the whole event. We all need downtime. The problem is that we each have our own rhythms so our patterns of endurance and points of exhaustion do not match with those around us. Given this reality, how should we structure a peer conference so that the sessions involve alert, effervescent participants?

Breaks can be shorter at a one-day event than they need to be at a four-day event. That doesn't mean they should be. But if you have a crowded, must-do agenda you can get away with minimum breaks for a one-day event. At longer conferences, there's no excuse for not scheduling extended breaks, and your attendee quality of experience will suffer if you don't. A long lunch break—at least ninety minutes, preferably two hours—and a significant break between the last session of the day and dinner is a simple way to build longer breaks into the day, but having twenty to twenty-five minute refreshment breaks between morning sessions will also help to keep energy, participation, and learning high during a multi-day event.

Finally, the amount of participation and interaction included in sessions will influence the amount of break time needed. The opening roundtable I use at my conferences can last a couple of hours, and when I first ran this session I innocently ran it with just a single midway twenty-minute refreshment break. Eventually I noticed what an energy sink this was, so now I break up the session every twenty minutes with short participative exercises like human spectrograms and pair share introductions (see the next chapter). A refreshment table in the room allows people to grab a drink, fruit, or a protein-snack during these frequent breaks. By using multiple short breaks, the energy level in the room remains high at the cost of very little extra break time overall.

Neuroscience supplies the most important rationale for providing white space at your events. As molecular biologist John Medina describes in his book *Brain Rules*, learning occurs best when new information is incorporated gradually into the memory store rather than when it is jammed in all at once. Brains need breaks.

We need white space not only between sessions, but also during them to maximize learning. Medina suggests that presentations be split into ten minute chunks to avoid the falloff in attention that otherwise occurs. (Back in the '70s, Tony Buzan, the inventor of mind maps, recommended studying in cycles of twenty minutes followed by a short break, a technique that has served me well for more than forty years.)

In addition, Medina tells us that multisensory environments provide significantly more effective learning than unisensory environments; recall is more accurate, has better resolution, and lasts longer. So make sure your sessions include multisensory input (participatory exercises, participant movement, smells, touch, etc.) and your conference locale provides a pleasant multisensory environment.

You can find much more information about all these topics and a compendium of participation techniques that take advantage of them in my new book, scheduled to be published in 2013.

How do we find a balance between providing white space during and between conference sessions and our desire to provide as much potential content and opportunities for our attendees?
During sessions it's important to provide white space between every ten to twenty-minute chunk of learning, so that the learning that has occurred can be processed and retained. This is something that we should all be doing to optimize the learning experience at our events.

Between sessions it's important to include significant unstructured time. A ten-minute break between two one-hour sessions is the absolute minimum I'll schedule, followed by long refreshment or meal breaks. I am not a fan of providing intrusive entertainment during meals—eating together is one of the most intimate bonding activities humans have—for goodness sake, let your attendees talk to each other during this time!

Finally, instead of deciding how much white space should exist at your conference, let the attendees decide! At the start of the event, *explicitly give people permission to take whatever time they need to rest, recuperate, think, etc.* It may seem silly, but I find that if you publicly define the event environment as one where it's expected and normal for people to take whatever time they need for themselves it becomes easier for attendees to give themselves permission to do so.

Chapter Seven: Break up roundtables approximately every twenty minutes

<Page 265>

Thank you Andrea Sullivan for improving the effectiveness of roundtables with this simple and very important suggestion!

It has been known for a long time that our attention to a single experience starts to flag after as little as ten minutes. (This is why traditional fifty-minute lectures invariably create a relatively poor learning environment.) Although speakers at a roundtable change rapidly—every one or two minutes—the mid-way break I used to include at large roundtables is simply not enough to restore participant energy levels in a ninety-minute or more roundtable.

The cure is not only simple but can also significantly enrich the learning that occurs during the roundtable. Every twenty minutes, include one of the rejuvenating and learning opportunities described below. While each activity only takes a few minutes, you will find that the act of getting up and engaging with other participants provides an effective attention boost!

Experience human spectrogram

A spectrogram of the number of years of available experience in a conference theme or session topic provides a powerful demonstration of the collective resources of the group compared to those of one or a few experts.

To run this human spectrogram you'll need enough completely clear room space to arrange participants into a line of bodies that reflect responses to the question asked. I call this area the *spectrogram corridor*. The line should be formed between the two walls of the room that are furthest apart (the long dimension of the room). Make the clear area at least ten feet wide, and large enough to provide at least ten square feet per person. Check that people can easily make their way to the open space in the room from wherever they may have been seated or standing, and that no obstacles, such as projectors, audio equipment, or podiums will be obstructing the space during the process.

Say something like this:

> *"I'm going to invite you to form what's called a human spectrogram. You're going to line up in order by the number of years experience you have in*

[conference or session topic]. So, if you've just entered the [industry/field] you should go to that wall [indicate a wall at one end of the human spectrogram corridor]. If you've been in the [industry/field] for many years, the sky's the limit; you should be over there [point to the other wall of the spectrogram corridor]. You'll need to talk to each other to figure out where you should be standing! Find your places!"

Wait while people are moving into position. While they're doing so, estimate the number of participants in the room.

Once people have stopped moving, ask a few people at the high experience end of the spectrogram to say how many years experience they have and repeat their answers for the whole group. Then, walk to the middle of the line (i.e. the point where there are approximately equal numbers of participants on wither side of you) and ask the people there how many years experience they have. Use their answer to calculate the total number of years experience in the room by saying something like:

> *"So the median number of years of experience here is ten [replace by actual median] years. Since there are 80 [replace by actual estimate of people in the group] people here, we have about 800 [10 x 80; replace by actual multiplied figure] years of experience in [industry/field] present in this room. This is far more experience than any one or two people could have."*

If appropriate, you may want to add:

> "*We're going to tap that experience right now to your benefit.*"

Category grouping

Sometimes a conference audience includes more than one kind of participant. You may, for example, have a mix of industry practitioners and suppliers of products and services that the practitioners use. Or you might have different medical specialties represented at your event.

Knowing who else in your category is present is useful information for participants. Help them out by assigning each category to a different place in the room. Then ask participants to get up and move to their area. Ask if anyone fits in a category that you haven't specified and have them create an appropriate category. If the resulting groups are small, give people a few minutes to introduce themselves. Otherwise, provide a summary of what you see—e.g. *"It looks as though we have about seventy percent sales staff, twenty percent sales tools representatives, and ten percent sales consultants"*—and have people return to their seats.

Introduce yourself

This simple technique can be repeated at different breaks. Ask everyone to stand up and introduce themselves to one other person they don't know. The facilitator should be on the lookout for people who are unpaired and pair them up or add them to an existing pair.

Grab!

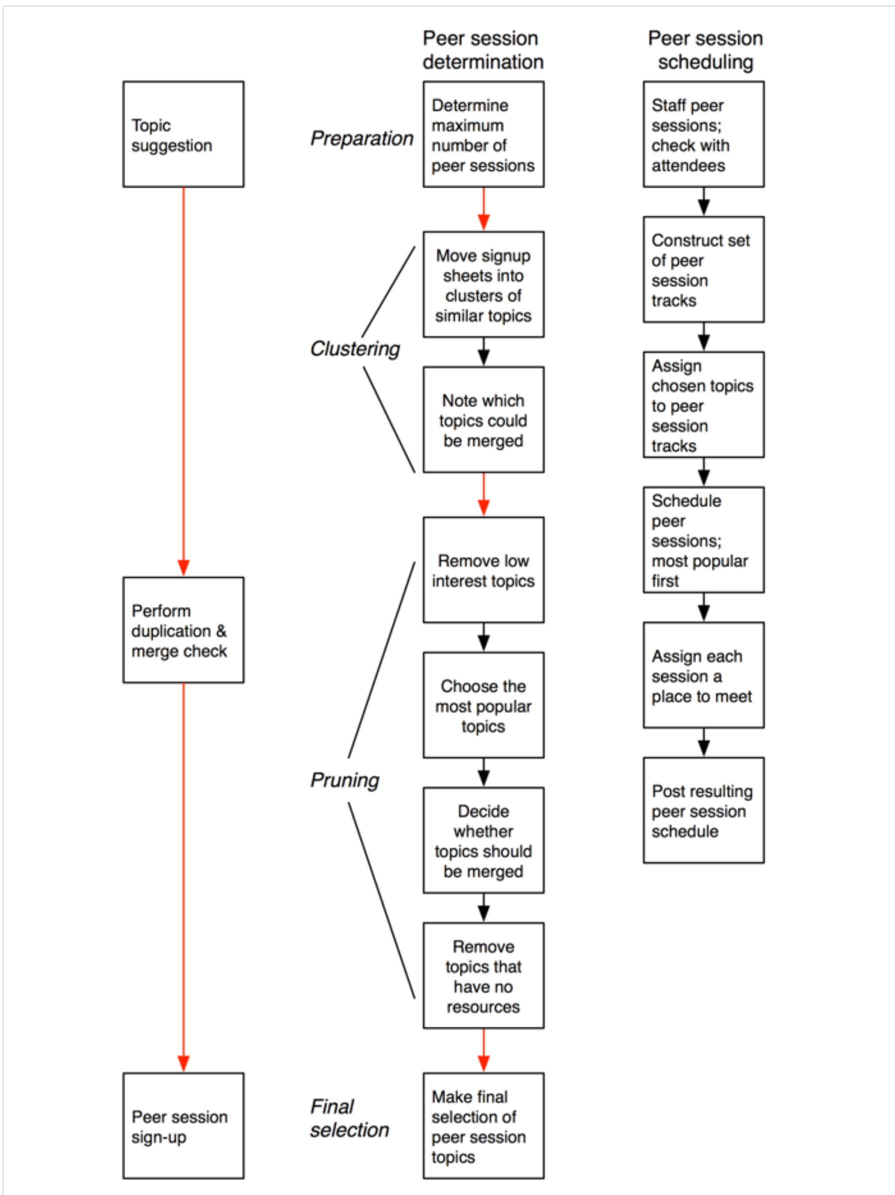
For a quick energy boost, play *Grab!* Have people stand and pair up with someone they don't know. (Another option is to have them find someone with the same colored eyes.) Ask each pair to decide who's A and who's B. Then have the A's hold one hand out, palm and fingers flat and facing B at a comfortable height. B then points her index finger at A's palm at the same height. B's task is then to rapidly touch the center of A's palm with her index finger and pull it away before A can grab it. Giggles will ensue! Give each pair around ninety seconds to play and then have them switch roles. (Thank you Erik Peekel for introducing me to this game at FRESH 2013!)

Chapter Eight: Make peer session determination more efficient

<Pages 269-278>

Here are four ways to reduce the amount of work the small volunteer group performs when determining the peer conference schedule:

Use this improved flowchart



Perform a preliminary duplication and merge check between topic suggestion and sign-up

I've found that reviewing the suggested topics for duplication and potential merging significantly reduces the amount of work required to create the conference schedule. By performing a quick review of the topic sheets right after topic suggestion:

- Duplicate topics can be eliminated;
- Unclear topics can be rewritten or removed; and
- Similar topic suggestions can be merged into one topic.

The review usually takes about five to ten minutes for a thorough job. This is easily incorporated into a social at a peer conference lasting longer than a day. Even at a daylong conference, a quick two to three minute review can be squeezed in.

When running this review step, check that each suggested topic title is clear and comprehensible to your small group. If it isn't, it probably won't be for some of your participants either!

I find that around 5% of topic suggestions can be improved or eliminated by incorporating this step. It's worth doing!

Consider providing participants with a set of predetermined categories for topic suggestions

Supplying a predetermined set of broad categories for participants to add to their topic sign-up sheets helps the small group perform step two: "*Move sign-up sheets into clusters of similar topics*." If you decide to do this, brainstorm a list of categories that cover the peer conference scope. Try to make the chosen categories overlap as little as possible, and make sure that an "Other" category is included.

Add a space for a category to be added to the blank sign-up sheets, and post reference lists of your chosen categories amongst the blank sheets. During topic suggestion, ask participants to add one of the listed categories to each completed sheet.

Use the filled-in categories to quickly perform step two of session determination. Check each of the resulting piles to make sure that the chosen category is accurate, and review the “Other” pile to see if any topics there should be filed under an existing category or placed in a new one.

Use a software-based version of the entire scheduling process

In 2009, Charles Thompson, a director of edACCESS—a non-profit I cofounded that has been running an annual peer conference since 1992—told me that he had written software to assist scheduling the conference’s peer sessions. (This is a great example of the kind of spontaneous volunteerism engendered by peer conferences.) We have been using this software ever since and it has proved to greatly reduce the time needed to create a minimally conflicting schedule, especially when scheduling as many as 32 peer sessions at edACCESS. While Charles has not turned his work into a commercial product, if you are interested in using his software for scheduling sessions at a multi-day peer conference, contact him at <t@taftschool.org>.

Chapter Nine: Improve personal introspectives by running them in small groups

<Pages 286-7 and 290>

In 2010 I was asked to facilitate a closing personal introspective at [EventCamp Twin Cities](). Because this was a hybrid event I had to modify the format to accommodate the remote attendees, and this led to my dividing the local participants into small groups rather than the large circle(s) described in *Conferences That Work: Creating Events That People Love*. Each group then shared simultaneously amongst its members.

To my surprise I discovered that the participants preferred being in small groups. It turned out that listening to the sharing of just a few other people provides opportunities for comments, feedback, and support that do not occur with the older format. In addition, a personal introspective takes less time. As a result I now recommend that participants divide into small groups before the personal introspective begins.

To use this improved format, prepare by setting up equally sized circles of between six to eight chairs around the room before the introspective starts. To make fully filling the circles as easy as possible, do not set out more chairs than the potential number of participants. Calculate the average time for each person to share by subtracting 15 minutes from the time allocated for the introspective, dividing the result by the maximum number of participants in each circle, and rounding down to the nearest minute or half-minute.

At the start of the introspective, ask participants to choose and sit in a circle of chairs that does not contain other people from their organization (or division if this is a corporate event), and, as much as practical, a circle with people they don't know. Explain that you need full circles for the exercise.

As people take their seats, monitor the circles and encourage people to fill each circle completely. Invariably some small groups will have fewer people than others and you'll usually have to direct those people in sparsely filled circles to abandon their circle and join partially filled circles. *It's OK for some circles to have one chair vacant, but keep moving people and do not start the introspective while any circle has two or more chairs empty. Also, do not let people add themselves to a circle that is already full.*

To check if the seating distribution is satisfactory, ask circle members to raise hands if their circle is not the right size. For example, if there are six chairs in each circle, have members of circles that do not have five or six members raise their hands. Keep checking until *all* the circles are an acceptable size.

Once all hands are down, ask if anyone is sitting with someone else from their organization or division and have them swap with someone from another circle.

If latecomers appear, assign them to partially filled circles. If all circles are full, they will have to join an existing circle; make it clear they will probably not get time to share during the second part of the introspective unless there is spare time available after the other members of their circle have shared.

Use one of the timing methods described in Chapter 23 to provide an audible reminder to end each participant's group sharing. I recommend you also provide a preliminary 30-seconds-to-go warning sound during sharing.

Replace the suggested sharing dialog on pages 289-290 with something like the following:

> *"I hope this exercise has been useful for you. Now it's time for the second part of the personal introspective. In this part you'll each be given an opportunity for sharing what came up for you during this exercise. I want to emphasize that your answers are private, and you can choose whether or not to share. You may not want to share anything. That's OK! You may not want to share everything. That's OK too.*
>
> *Having said that, I encourage you to talk about whatever you feel you can. Many people find that it can be very helpful to share their answers. We have enough time to give each of you [the average sharing time you calculated]; you'll hear a warning sound when you have 30 seconds left [demonstrate] and this ending sound [demonstrate] when your time is up. Please end promptly when you hear the ending chime, as otherwise you will reduce the following person's time to share. If someone doesn't use their entire time, discuss or ask questions about what has already been shared, but be ready to start with the next person in your group as soon as you're asked to do so.*
>
> *Don't interrupt while people are sharing. If there's time before the next person, you're welcome to ask questions or comment, as appropriate. Do not continue with the next person's sharing until you hear the "times-up" sound.*
>
> *The first person to share chooses which way the sharing passes around the circle, to his or her left or right. After each sharing is over, sharing passes in the same direction to the next person in your circle.*
>
> *Any questions? [Pause]*
>
> *OK, who wants to go first in each group? Please raise your hand"*

Wait until someone has raised their hand in every circle. Say:

> *"Remember, don't switch to another person's sharing until you hear the "times-up" sound. First person in each group…begin!"*

Start your timer. When the first person's time is up, ask them to choose which direction to share around the circle, and then repeat the personal sharing time for the next set of group members.

If you notice that one or more groups are staying silent because the current person sharing has finished, remind them that they can ask questions or comment on what's been said so far.

Chapter Ten: How to choose what to do at a group spective

<Pages 296-307>

My (current) favorite approach for group spectives

While all of the group spective techniques described in the book have their place, I've come to especially appreciate the combination of plus/delta followed by a fishbowl (aka focused discussion).

Although plus/delta takes up barely a page of *Conferences That Work: Creating Events That People Love* it has become my favorite method for opening a group spective.

Plus/delta is a remarkably simple and effective technique to quickly uncover in public the shared experience of an event. The groundwork prepared by plus/delta then provides a perfect springboard for further discussion.

For fewer than twenty people, facilitated informal discussion works fine to follow up on the ideas expressed during plus/delta.

With between twenty and sixty participants, I recommend using a fishbowl.

If you have more than sixty people, consider dividing them into sub-groups focused on major themes that the plus/delta uncovered. These groups can use small group discussion or an impromptu World Café format (see my new book, to be published in 2013, for more information on ways to do this).

Feeling you're in a rut?

If your group spective has only turned up minor tweaks to your repeated event for a while and your event isn't too large (say fifty or fewer participants) try a go-around using some of the questions on page 298 of the book. This can shake things up (see the story on page 300)! Follow-up with one of the discussion formats described above.

Need a more structured approach?

If there are expectations that specific outcomes are desired from the conference, use affinity grouping. Be sure to allocate enough time for this technique, which typically takes anywhere between thirty minutes for a small group and two or more hours for a large group with many ideas for future directions.

Optional improvements

Chapter Eleven: Include a first-timers session for repeat events

If you've been running a *Conferences That Work* event regularly (perhaps as an annual event) repeat participants tend to become familiar with the opening explanations of the peer conference format, ground rules, and the round table. Consider introducing these at a special session just for new attendees and those who have not attended recently. While this session is going on, returning participants can register and socialize.

What to cover for first-timers

- Housekeeping: Wearing badges and any badge coding used, face book availability and use, making announcements, peer conference handouts, and buddies <pages 254-5>.
- Description of the peer conference format <pages 256-8>.
- Four Freedoms <pages 258-9>.
- Ground rules: Confidentiality and staying on time <page 259>.
- The roundtable: Description and explanation of The Three Questions <pages 260-1>.

What to cover for everyone

- Housekeeping: Welcome, facility logistics, face book corrections, and staff introductions <pages 254-6>.
- Four Freedoms and ground rules commitment, and move into The Three Questions <pages 259-266>.

Chapter Twelve: Consider implementing a buddy system

<Pages 216-7>

It's smart to make first-time conference attendees feel as welcome as possible. Here's an easy way to do this.

For the last few years I've been organizing a buddy system to welcome conference newbies (who typically form about a quarter of the registrations) to an annual conference. A month before the event I set up a page on the private conference wiki that contains a table of first-time attendees, the name of their organization, and their email address. I send the page link to returning attendees and ask them to pick a first-timer to buddy with. I explain that a buddy's duties are to:

- Add their name and email information to the table, so we know that the newbie now has a buddy;
- Contact their chosen first-timer before the conference, introduce themselves and offer to answer any questions they have; and
- Offer to meet their first-timer at the beginning of the conference and answer any further questions/be generally helpful as appropriate.

That's it. These are not onerous duties, and returning attendees have been happy to comply. The first-time attendees I've spoken to have been happy to be contacted in advance by a returning attendee, and though they usually have few questions, they have been extremely surprised, pleased and appreciative to have a veteran attendee offer guidance, if needed.

Happy first-timers are much more likely to return. Giving them a pre-conference buddy contact to introduce them to an event and answer any questions is a simple way to make a great first impression. Mom probably told you that first impressions count for a lot. She was right. That's why this tip works!

Chapter Thirteen: Use shared Google Doc for roundtable themes and plus/delta sharing

<Pages 232 and 298-9>

Here's a simple idea, courtesy of edACCESS colleague Bill Campbell, that can come in really handy when you want to cover a public conference presentation or session without devoting most of your time to keeping up with what the speaker or participants are saying.

Crowdsource your event recording! How? Before the session, create a Google Drive document and make it public, shared, and writable. Next, use a URL shortening service like bit.ly to create an easy-to-type weblink to the document; e.g. bit.ly/edaccess2013plusdelta. Finally publish the resulting URL on the Twitter feed for the event and/or on the projection screen in the room before the session starts, together with a request to help out with session notes. Anyone with the web link will be able to log in and help share the work of documenting the session.

Projecting this document onto one or more screens during the roundtable provides the same benefits as the old flip-chart method, with the advantage that a permanent record of topics and themes is created. If desired, a digital copy of the resulting document can be supplied to participants immediately following the roundtable.

Two sample templates for roundtables and plus/deltas can be found at the links below:

http://bit.ly/roundtabletemplate

<insert name of conference here> Roundtable Topics

Anyone can edit at <insert bit.ly link here>

http://bit.ly/plusdeltatemplate

<insert name of conference here> Group Spective plus/delta

Anyone can view at <insert bit.ly link here>

Plus	Delta
•	•

Discussion

-

Determined

-

Important: *To use these templates, make copies and change the sharing settings to "Public on the web" (visibility) and "Can edit" (access)*. If you don't do this, participants won't be able to find or edit the documents!

Chapter Fourteen: Have people stand when speaking during the roundtable

<Page 262>

It may seem like a small thing, but I’ve found that having people stand when they share their answers to The Three Questions improves their energy and others’ attention. Add this as a fifth sharing guideline.

Chapter Fifteen: Use alternate colors when recording on flip charts

<Pages 265-6>

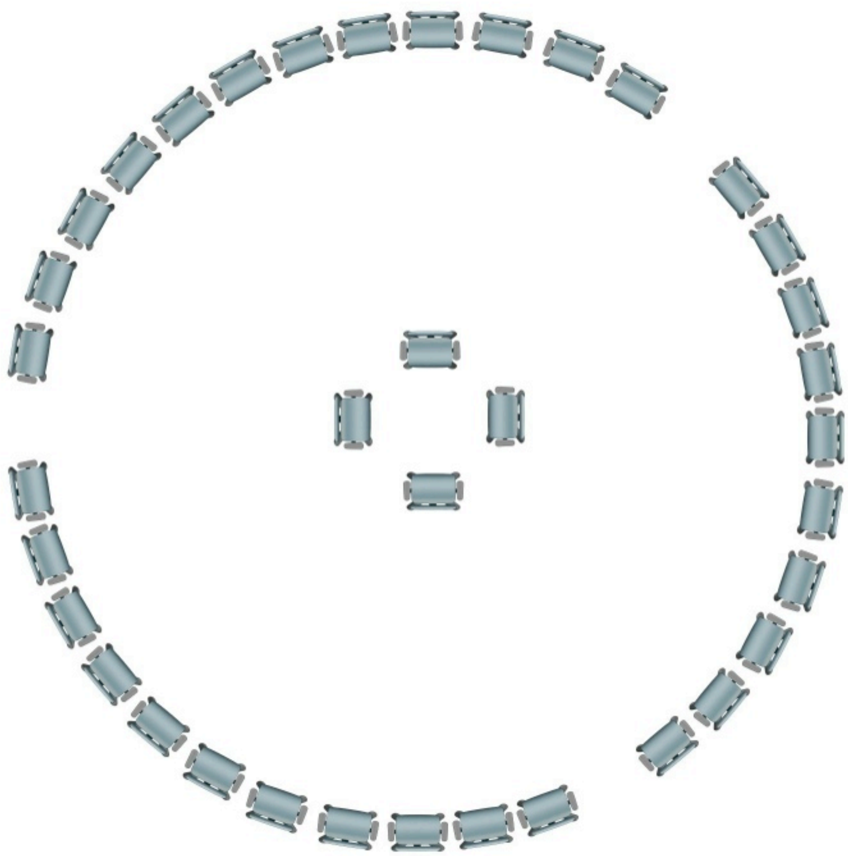
If using flip charts to scribe themes that are mentioned during the round table, have the scribes alternate colors from one theme to the next. This separates one topic from another, making the list easier to read.

Chapter Sixteen: Focused discussion = fishbowl — and an alternative format

<Pages 305-7>

Since publication, the term *fishbowl* has been used increasingly frequently in the event world for what I've called *focused discussion*. They are the same thing!

For large groups I've also started to use the circle form that was mentioned briefly on page 305. Sometimes it feels more dynamic and fits the room dimensions better. Here's a diagram of this alternative chair layout.



Don't use this for a small group, though—it's a little disconcerting to stare at someone's back at close quarters.

Alternative approaches

Chapter Seventeen: Consider using a conference app instead of a face book

Since *Conferences That Work: Creating Events That People Love* was published, the availability and adoption of conference apps has mushroomed. Every week I receive solicitations to review new conference apps, whose prices range from free to tens of thousands of dollars with a concomitant wide range of functionality.

Many conference apps allow conference organizers to include a list of attendees, together with headshots and, optionally, contact information. Such functionality can potentially replace the paper face books I've been using for years, although such a digital face book does not usually include real-time note-taking tied to specific attendees. You may, as a result, decide to use an app but also have some paper copies of the attendee list available for those who wish to make written notes as the roundtable progresses.

Before selecting an appropriate conference app there are many aspects to consider: cost, support, app type (see below), and features. A good comprehensive free resource is The Event App Bible.

The two app types: native and web

Please make sure you understand the importance of understanding the two kinds of conference apps—*native* and *web*—before choosing a conference app.

Native and web apps

Native apps are programs installed directly on a mobile device. Native apps need to be designed specifically for the mobile devices they're installed on. This means that a provider of a native conference app must supply a version for each of the major mobile platforms; at time of writing this means one or two versions for Apple's IOS (iPad/iPhone), an Android app, and perhaps a Blackberry app. Once installed, native apps work largely independently of an internet connection, except when updates are needed. They, are therefore, preferable if internet access at the conference venue is intermittent, low bandwidth, or otherwise problematic.

Web apps are effectively mobile websites. They will work on any device with a web browser, but require constant connection to the internet to operate. Web apps, therefore, do not require any additional app to be installed on an attendee's mobile device, but they will not work without a reliable internet connection.

Chapter Eighteen: Consider running plus/delta with tape columns on the floor

<Pages 298-9>

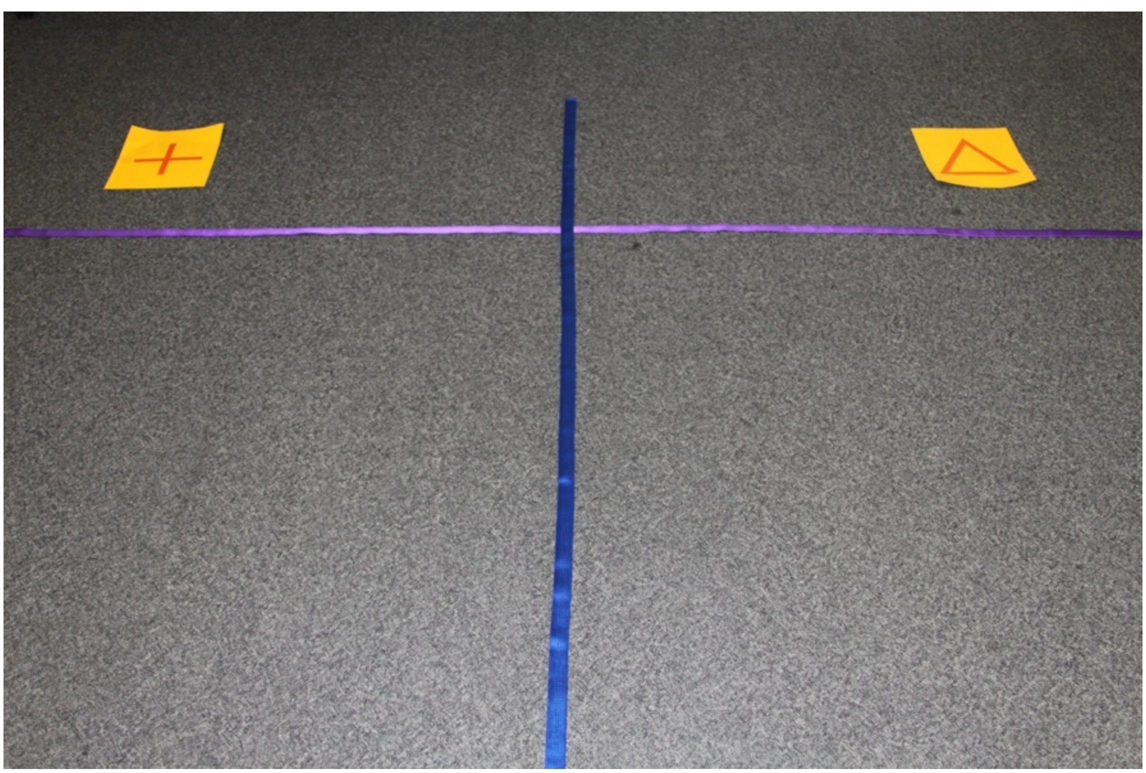
As mentioned in the previous section, plus/delta has become my favorite technique for opening a group spective.

Consequently I have started using plus/delta with larger groups, and this has led to a minor improvement that is especially useful when there are many people who want to share.

Before running plus/delta with a large group I now create the two columns on the floor using colored nylon strapping tapes.

A wide variety of these tapes is available at Strapworks and other vendors.

You can also create the columns using high quality masking, painters, or gaffer tape (test first to make sure that it can be easily removed from the floor surface). A couple of sheets of cardboard printed with large versions of the plus and delta symbols complete the setup. The bottom of the floor columns should face the participants.



If the group is especially large I'll set up two floor microphones at the head of each column. Otherwise I'll use a single microphone and pass it between the people who line up to speak at each column.

This layout makes it easy for the later stage of plus/delta where contributors are switching between plus and delta comments. Instead of having to announce the right column for their response they just walk up to the relevant floor column. It also provides a natural place for people to queue while waiting to share.

Chapter Nineteen: Use plus/delta as a tool for action

Many conferences that tackle wide-scope topics like multiculturalism or sustainable business practices are not going to come up with definitive comprehensive solutions to the countless problems discussed, and this can demoralize participants who are hungry for change or filled with a desire to "do something".

Luckily the versatile plus/delta technique can be modified to use as a tool to inspire and document action. Here's how to do it.

At the start of the personal introspective, ask participants to review the influence they have personally in their professional and/or community work and have them focus on what they want to work on in their sphere of influence.

When the group spective begins, run plus/delta, with the two columns redefined as follows:

- Plus ==> actions I/we want to work on; and
- Delta ==> issues that concern me but that I don't know how to address.

This allows participants to move from the personal decisions made at the introspective into sharing, discussion, and support of initiatives to which individuals have committed (the plus column). The plus/delta scribe adds the name(s) of those who commit to action in the plus column. The delta column can then be used to allow participants to explore other ideas and who might be able to work on them. As a result, some deltas can turn into pluses.

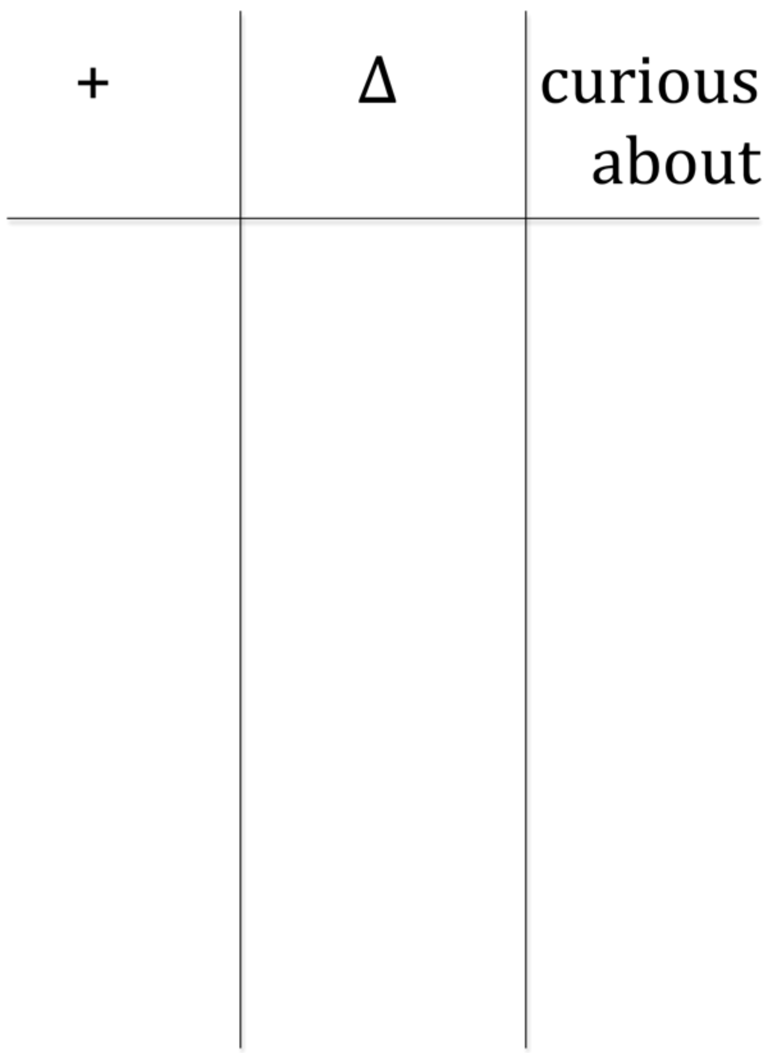
Items posted in the plus column represent action outcomes from the event and serve as a concrete documentation of positive initiatives that have been identified and associated with specific objectives and participants.

Chapter Twenty: Consider adding "Curious about?" column to plus/delta

An addition to plus/delta that's worth considering is to add a third column "Curious About" to the right of the plus and delta columns.

This provides a place to capture topics or ideas that the group can return to once the plus/delta is complete.

Give participants an opportunity to add content to this column once plus and delta contributions have died down.



Miscellaneous tips

Chapter Twenty-One: Where to buy stiff 5 x 8 index cards

For some reason—cutthroat competition in the filing card industry perhaps—5 x 8 cards of a pleasing stiffness have mysteriously vanished from office supply stores over the last few years. The cards now commonly sold have the strength and solidity of thick paper, and this makes them frustratingly difficult to write on when a hard surface is not available.

At time of writing, better cards are still available from *Chesapeake Office Supply*:

Buy yours there, and tell them Adrian sent you. (No, I don't get a commission.)

Chapter Twenty-Two: A closing note about appreciations

<Pages 291-3>

To conclude, some wise words about appreciations from my friend Bernie De Koven:

> *"I like how the financial world uses the word [appreciation]. For them, appreciation means increasing in value. I think that's what happens for us when we appreciate something or someone. It gets better. More precious. More fun"*
> *—A Playful Path, Bernard De Koven*