"MY IDEA IN USING THIS OD ACTIVITY WAS TO ACCOMPLISH A HIGH DEGREE OF COMMITMENT, INVOLVEMENT AND OWNERSHIP FOR THE WORKSHOP FROM THE MANAGERS IN OUR COMPANY."

USING A FRONT-END ANALYSIS AT C&P TELEPHONE

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Have you ever had an assignment from your boss and you didn't know how to go about it or where to start? One morning my boss called me into his office to explain an assignment he wanted me to do. It seemed we had a lot of requests from managers to prepare a workshop on *"Conducting Effective Meetings."* These requests were generated mostly by managers who were craftspersons on Friday and on Monday were managers in charge of a group of people where it was necessary for them to conduct meetings. Many of them had never conducted a meeting before and frequently, when they had attended meetings, left with the feeling that it was a waste of time. In addition to these people, there were managers at higher levels in the organization who allowed as how they, too, could use some help in this area.

As part of the assignment, I was given the following instructions:

. . . The workshop must be pragmatic.

. . . It must be informative and highly useful.

. . . It must be easily understood and internalized.

. . . It should be suitable for all managers in the organization.

. . . It should not be boring (easy to be with this subject)

. . . It should be no longer than two days.

I understood the assignment. I was given a *carte blanche* as to the process used in preparing the workshop. With the parting words from my boss, *"It's all yours,"* I left the office. Now what? Where do I begin? I knew there were many books and articles written on this subject, but all I could think of was how boring it would be to have a two-day lecture on how to conduct effective meetings.

For a couple of days I was a complete blank. I started to read articles and books on the subject, but all I could come up with was getting together a lot of information and giving a two-day speech on "do's" and "don'ts" of a good meeting.

My process for preparing the workshop came to me one day when I was conducting another workshop which dealt with discussions first-line managers most needed help with when dealing with their subordinates. These discussions (nine in all) had been selected as a result of interviews with a cross section of first-line managers. "They" gave us the subjects "they" most wanted and needed. As a result, a workshop was developed around these nine discussions which proved to be highly relevant and effective.

If this method of interviewing, i.e., a "front-end analysis" or "data collection" worked for this workshop, why not use it for writing the "Conducting Effective Meetings" workshop? In other words, go to the source; go to the people who want the workshop and find out . . . what they want included in it; how they want it presented; what their ideas are on such things as:

- decision-making in meetings
- preparing the agenda for a meeting
- conflict resolution in meetings
- characteristics of a good chair-

person
- characteristics of a bad chairperson
- characteristics of a good meeting
- characteristics of a bad meeting

My idea in using this approach was to accomplish a high degree of commitment, involvement and ownership for the workshop from the managers in our company (The Chesapeake and Potomac Telephone Co. - C&P Tel. Co.). I also figured what better resources than the people who were potential conferees.

With this in mind, I developed a questionnaire to be used in the interviews (Figure 1). The questions were designed to give me answers to some of the things on my mind such as:

- What are some of the things you would like to see included in a two - day "Conducting Effective Meetings" workshop?
- What type of workshop would you like it to be? (process, practical, experiential, how presented)

The remaining questions were to gather data from managers as to their thoughts on these items. I felt this was important because I wanted to use this material in the workshop as well as data from outside resources (books, films, seminars, articles). My purpose was to give the conferees a feeling for what their fellow managers had to say about these questions as well as outside authorities. By using this process, I was better able to generate data from workshop conferees on these subjects. This data was included as a supplemental resource along with "outside authorities" and "other C&P managers."

This in itself produced a high degree of ownership, commitment and involvement from the conferees. (*"If other C&P managers have some thoughts on these items, we do too!"*)

At this point I would like to explain the process I used in implementing the questionnaire. That was my instrument and key to the Front-End Analysis. I wanted my sample to include the following:

- All five organizations in our company —
  - Group Headquarters
  - The C&P Tel. Co. of Maryland
  - The C&P Tel. Co. of Virginia
  - The C&P Tel. Co. of Washington
  - The C&P Tel. Co. of West Virginia
- A cross section of managers interdepartmentally
- A cross section of managers by levels in the organization (first through fourth level)
- Approximately 8 to 10 managers per company.

With these objectives in mind, my next decision was whether to mail the questionnaire to the managers selected or conduct personal interviews.

Mailing would obviously be easier on me, but I was concerned with the quality of the data I would obtain. I wanted the replies to be unrehearsed and I particularly did not want "book" answers (I had a good supply of those). I felt that in some cases it would be tempting for respondents to look up the "correct answer" in a reference book or consult with fellow managers. My objective in administering the questionnaire was to get a manager's spontaneous feelings on a question.

With this in mind, I decided to gather my data by personal interview. There were some associated anxieties which resulted from this decision:

- What if I spent the time necessary to make personal interviews (five weeks — one week per company) and the data collected was not worthwhile?
- What if I spent the money required for travel and living expense for nothing?
- How would I get a representative group from each company? I certainly did not have personal knowledge of such people in the five organizations.
- How could I schedule the interviews so I could complete each company in a week's time? (I felt that was all the time I could take.)
- How many managers would I be able to talk to per day considering travel time between interviews?

My approach to these questions

Figure 1.

Conducting Effective Meetings Workshop Questionnaire

Company ______________________________

Name ______________________ Department ____________

Title ______________________ Date ____________

1. What are some of the things you would like to see included in a two-day "Conducting Effective Meetings" workshop?
2. What type of workshop would you like it to be? (process, practical, experiential, how presented)
3. In your opinion what are some of the characteristics of a good meeting? (Things that help make a good meeting)
4. In your opinion what are some of the characteristics of a bad meeting? (Things that hurt a meeting)
5. What ideas do you have for correcting or eliminating the items you mentioned in Question 4?
6. What are some of the characteristics of a good chairperson?
7. What are some of the characteristics of a poor chairperson?
8. In your opinion what is the best way for preparing the agenda for a meeting?
9. What are some of your thoughts on how decisions should be made in meetings?
10. What are some of your thoughts on how conflict (difference of opinion) should be resolved?
11. What are some of the things which should be done prior to the meeting? (Preparations)
12. Do you think that it would be helpful to include some of the principles of Transactional Analysis in the workshop? If so, how?
13. In your opinion what are some of the functions of a meeting?
14. Other comments?

> "One of the things I was most interested to test was to verify if personal interviews really paid for themselves considering the time and money involved to gather the data."

was to contact the Personnel Department in each company and explain my mission. As a result, a series of interviews were arranged so that I would have my interdepartmental and organizational level mix. The schedule was such that I could meet my time commitment of one week per company, including travel time between interviews. This meant that on some days I had three interviews while on other days, where the distance was greater, I had two. I had estimated approximately two hours per interview which proved to be a pretty good estimate. Each session lasted from one and a half to two and a quarter hours. The travel time between interviews varied from 10 minutes to two hours.

One of the things I was not interested to test was to verify if personal interviews really paid for themselves considering the time and money involved to gather the data. After the first few, there was no question in my mind. I say this for several reasons. First of all there was considerable discussion and elaboration on each question. Something I said or the interviewee said triggered a thought that hadn't been in either of our minds before.

Also, I was able to set the stage for each question. For example, on the first question, "What are some of the things you would like to see included in a two-day 'Conducting Effective Meetings' workshop?" I said, *"Suppose your boss called you into his office one day to tell you that you are scheduled to attend a two-day 'Conducting Effective Meetings' workshop. You are now walking to that workshop and you are saying to yourself, 'I hope they have included such and such in the workshop' or 'I certainly need some help on these items . . .' What would some of those things be?"*

I used the same process for the other questions. The managers seemed to relate easily to the questions when they were posed that way. To check my own perceptions, I verified this feeling with some of them. Their reaction was that a lead into the question by setting the stage helped to "put them in place back on the job" and assisted them in responding to the question in more depth.

There was no doubt in any of their minds that a personal interview far outweighed a mailed questionnaire. It was their opinion that they would not have given the same quality answers or taken as much time to explore their feelings. Also they felt the interplay in the interview allowed them to think of things they probably would not have thought of while filling out a mailed questionnaire.

Some managers asked me why I hadn't mailed them the questionnaire in advance so they could prepare for the interview. I explained that I was interested in their spontaneous answer, not a laundry list of items they had researched from books or other managers. I told them I felt that their unrehearsed answer would be the really important data I was looking for. They not only accepted, but also agreed with this premise.

As a result of this Front-End Analysis, the format and process of the workshop fell right in place. They wanted a highly participative workshop, not a "tell" session. This I did. I designed it so the conferees had an opportunity to develop their own data on the key points covered. This pleased them. It gave them the feeling that they participated in developing the conclusion reached regarding conducting effective meetings.

Also, it gave them a sense of ownership, commitment and involvement to the data. This was one of my objectives. It became a point of interest for them to compare their "findings" with those of other C&P managers (collected in the Front-End Analysis) and outside resources (books, films, articles, seminars). It also gave the participants an opportunity to see that there are many thoughts on how to conduct effective meetings and much of it boils down to considering the input and then associating it with the manager's own particular style.

As part of the workshop, I gave participants an opportunity to practice conducting a meeting and receive feedback from the other conferees as well as trainer. This was an ongoing process. As different phases of the workshop were covered, emphasis was placed on how each phase could be used in the afternoon of the second day when they would be conducting their own meeting. This proved to be the "peak experience" of the workshop. The practice meeting, incidentally, was included as a result of the Front-End Analysis. It was one of the suggestions most frequently requested.

As to the format, it too fell into place. I broke it down into four sections:

1. **Before the Meeting**
   - alternatives to meetings
   - meeting preparations
   - agenda setting
   - etc.
2. **During the Meeting**
   - meeting dynamics
   - process "tools" to cope with meeting dynamics
   - leadership/participants' roles
   - etc.
3. **After the Meeting**
   - closure for a meeting
   - follow-up action
   - follow-up responsibilities
   - etc.
4. **Application**
   - practice meeting (prepare and conduct during workshop)
   - conferees and trainer feedback.

When the workshop was completed, I conducted three trials with "live" conferees, none of whom had participated in the Front-end Analysis. I concluded each day with a written (unsigned) critique. On the second day, I had the conferees critique that day on its own merits as well as the total two-day workshop. My objective was to get a critical look at the workshop by segments and as a whole. Based on my personal observations and the critique sheets from the conferees, it was a success.

This then is what I did when my boss gave me an assignment and I didn't know how to do it. The managers I interviewed gave me my workshop! They told me what they wanted in it. They gave their ideas on important issues in a meeting. They told me the kind of workshop they wanted and how they wanted it presented.

Postscript

It is my opinion that a Front-End Analysis can be effectively used not only in the initial data collection described in this article, but also in periodic follow-up validation studies. I plan to do this. Such validation will ensure that necessary revisions are made in both the workshop content and process.

This was my first experience in using a Front-End Analysis. On reflection, I can think of many times in the past when it would have been a much better approach to a project than the one I used. I feel quite strongly that it is an underutilized process, partially for the time consumed and partially for the expense of the undertaking. I feel equally strongly that, in the long run, it can save time and money on many projects which go off the press based primarily on the author's assumptions only to meet with a dismal failure when implemented.

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