Enter electronic meeting-support software (EMS), a dazzling new collection of computer tools that is revolutionizing meetings as we know them. The software is making meetings far more productive—even energizing and fun. And it's helping to redefine corporate and organizational decision making.

EMS, also known as groupware or meeting ware, is a collective term that refers to a suite of new computer-based devices used to facilitate the planning and management of focus groups, executive retreats, strategic-planning sessions, product-development meetings, team-building seminars, and other meetings and training programs.

It's proving useful as a tool in guiding business-process reengineering, corporate restructuring and change management, consensus building for setting organizational goals, and brainstorming sessions for new or long-term business problems. It's even finding a niche as a conflict-resolution tool, largely because it helps to surface issues and facilitate communication.

Groupware is able to do all those things because it speeds the pace of meetings, actively engages participants in ways that traditional meeting tools do not, and elicits higher-quality input from attendees. It's also a great organization tool that helps you focus on the agenda and keep group discussions on track.

Groupware includes everything from keypad technologies such as OptionFinder and Consensus-Builder (used to conduct anonymous polling and voting within groups) to such sophisticated group-facilitation tools such as Ventana's Group Systems V, VisionQuest from Collaborative Technologies, and the Meeting Room from Eden Systems.

EMS technology enables facilitators to poll meeting participants; capture large amounts of verbatim feedback; do statistical analyses of voting and polling results; and create detailed reports for research, management, or action planning.

Electronically linked

How do you use groupware in a meeting or group-facilitation session? Basically, you begin with laptop computers linked together in a classroom environment via a local area network. A typical groupware session uses a large screen at the front of the room—an "electronic flipchart" that displays participant responses.

Some organizations have dedicated EMS facilities, but many EMS suppliers—including Ventana—also offer portable EMS systems. With a couple of hours set-up time, meeting planners can use such systems in field offices and plant. Once set up in a meeting room, groupware allows all meeting participants to interact electronically with each other and with the facilitator.

By Jim Clark and Richard Koonce

Meetings Go

GROUPWARE TECHNOLOGY IS REINVENTING MEETINGS. HERE'S WHAT'S OUT THERE AND HOW YOU CAN TAKE ADVANTAGE OF IT.

HIGH-TECH

Face-to-face discussion can still take place, but participants also spend much of their meeting time using laptops to respond to questions, to hold group discussions, and to jointly create work documents such as marketing plans and mission statements.

Participants can either be located in one meeting room or geographically dispersed. Depending on the system configuration, any number of participants can take part in a groupware session.

A strategic-planning tool

Let's say, for example, that your company's senior-management team needs to do in-depth strategic planning to position the company for a new competitive market. But you have only a few hours at an executive retreat to elicit ideas and approaches from attendees, and manually writing
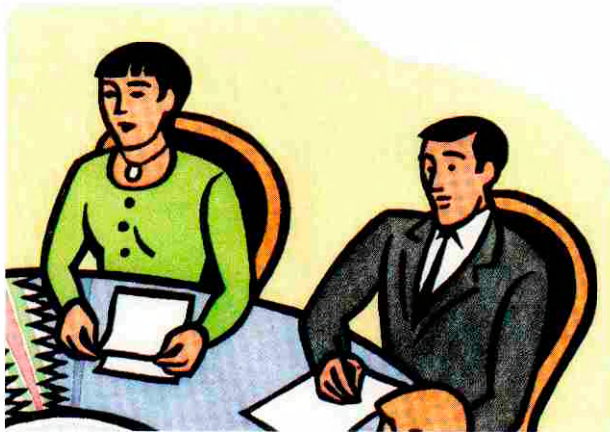
ideas on flipcharts is too tedious and inefficient.

Groupware can help manage such a meeting by capturing verbatim data from participants simultaneously. For example, participants can respond via laptop to open-ended questions in as much detail as time permits, and then can work together to construct such documents as marketing objectives, sales plans, product-rollout schedules, and implementation time frames. Groupware also lets you organize participant input into bar graphs, charts, file folders, and hierarchical decision trees—both on participants' laptops and on a central display screen.

Recently, a $5 billion bank holding company used groupware to do some much-needed strategic planning as part of a major reengineering effort.

Specifically, a heterogeneous group of bank leaders (including everyone from the CEO to midlevel bank managers) used it to build consensus around key business priorities that the bank had to implement in order to stay profitable.

That was no small feat; there were significant disagreements among the managers about how to accomplish their goal.

In keeping with the bank's time-honored philosophy of relying heavily on traditional branch operations to serve customers, one group inside the bank (consisting of several top bank executives) wanted to decentralize bank operations so regional offices did more of their own work. Those managers were pushing for a renewed emphasis on premier customer service at the branch level, using numerous tellers and a strong emphasis on "small-town" friendliness to serve a traditional customer base.

Others in the bank disagreed with that approach, calling it outmoded, irrelevant, and impractical to sustain in an age of mega-mergers and electronic banking. Members of this group felt that the bank, which had recently come through tough financial times, needed to tighten its operations and hold branches more closely accountable to corporate-wide policies and procedures. They believed that the bank's regional management lacked the skills to manage operations effectively without a strong guiding hand from company headquarters.

Meeting participants used groupware—specifically, a feature that allows people to answer questions or respond to statements anonymously—to express their real opinions about what the bank needed to do.

"We got all these people into a room, many of whom had different points of view on how best to proceed," says the facilitator, Wood Parker. "We had the chairman and a broad mix of both senior- and junior-level managers, the latter of whom in some cases would have been reluctant to

express their opinions in an open meeting."

With the anonymity allowed by the EMS technology, participants felt free to share what was really on their minds. As a result, they were able to come up with plans that addressed everyone's concerns.

"Once everybody put his or her cards on the table," says Parker, "we were able to work through differences, forge consensus about what had to occur next, and plan action steps to make it happen. It accelerated everyone's decision making and action planning."

In the short term, the group decided to focus on automating and upgrading account management and customer-transaction systems in the branches. To do that, it developed and voted on a list of action items to boost the efficiency of branch offices.

In the long term, members of the cross-functional and cross-level task force determined that the bank needed to reduce significantly its reliance on traditional branch operations and move toward greater dependence on automatic teller machines, phone systems, banking-from-home systems, and other tools typically used by large banks to manage retail accounts and minimize costs.

"What groupware did here was help team members take ownership of the strategic-planning process in ways they had never done before," says Parker.

"Because people were able to express themselves honestly, it enhanced the group's ability to come to consensus. The use of groupware in this situation actually acted as an engagement device to elicit people's involvement in the decision-making process, and as a consequence generated higher-quality input from people than would have been possible in a traditional strategic-planning session."

Anonymous input

As the previous example illustrates, one of the key benefits of using groupware in a meeting (besides collecting information) is that it enables participants to interact and contribute thoughts, ideas, suggestions, and feedback anonymously. So its use in a meeting can serve as a catalyst for conversations about politically sensi-

tive issues, about thorny workplace problems, or about situations in which group participants fear the consequences if they speak their minds.

Let's say, for example, that your company is interested in brainstorming the best way to reengineer core work processes.

You need to capture detailed information from frontline employees about what's involved in doing it right. But that means eliciting information that may aggravate turf battles and political squabbles within an organization. Getting it out in the open could reveal the folly of past business decisions or highlight the weaknesses of current technology or business practices.

In cases like that, the use of groupware can coax candid comments from shy or reluctant employees about the root causes of productivity or work-process problems. As a result, you may be able to assemble an arsenal of detailed information that you can use to build a business case for organizational change or to solve productivity and performance problems in new ways.

A tool for focus groups

Recently, five focus groups used groupware at the warehouse facilities of a large midwestern company. The focus groups were organized to help identify the causes of inventory-control problems, believed to stem from a new computerized inventory-control system instituted the year before.

Top management knew that the corporate culture didn't allow for forthright, face-to-face communication of ideas, opinions, and comments about the newly implemented system by employees who used it every day. Indeed, employees feared personal retribution if they spoke out about the system's flaws.

So plant managers used groupware to elicit peoples' true feelings about the system. Specifically, management wanted to know what people perceived as the weaknesses and strengths of the system. Managers wanted to identify specific work-process problems, ways they could be fixed (from the user's perspective), and the kinds of stresses system users felt as a result of the system's implementation the year before.

Four days of focus groups yielded a treasure trove of data, both qualitative and quantitative. Sessions identified not only the true nature of business problems in the organization, but also perspectives on why the new system wasn't working. The focus groups revealed that people in the organization found the system to be too complex, "user-unfriendly," and difficult to use to track inventory.

Moreover, the meeting software captured in rich (and at times colorful) detail the employee cynicism that existed not only about the system, but about top management's approach to dealing with line problems.

Finally, focus-group data revealed that employees believed there were multiple causes for the organization's excess inventory problems, and that only one of those causes was related to technology.

For example, employees said the company didn't give them enough training on the system. They said there were numerous "disconnects" in the company's distribution and inventory-management work processes, which prevented adequate inventory control.

Those findings were of particular interest. Top management had believed that the problem had only one cause, but the focus-group findings unearthed multiple causes. The inventory-control problems were more systemic than managers had realized. Without the volume and nuances of employee feedback that the groupware technology had captured, it's unlikely that the firm would have fully grasped the depth and severity of the problems.

Now the company is reassessing not only the use of its current inventory-control and management system,

but also the processes that relate to product shipping and handling and employee development and training. The organization has come to view its work-process problems from a multidimensional perspective—and all as a result of the feedback generated by EMS technology.

Groupware for consensus building

Besides helping teams to brainstorm and solve problems, groupware also allows you to conduct polls, to take votes, to do rank-order exercises to help set business goals and priorities, and to generate quantitative data and reports from voting and polling results.

According to Craig Petrun, groupware can help a firm "collect both numerical and qualitative data from people, organize and analyze it in many different ways, and use it for a wide variety of purposes." Petrun, an industrial psychologist, is an expert on the use of groupware for making critical business decisions.

"Depending on how questions are structured," explains Petrun, "you can generate reports that provide you with statistics about how participants voted, what the spread of responses was across a set of alternatives, and more. The findings can be easily and quickly assembled as print-out reports, based on a day's (or a week's or a month's) worth of focus groups and used as statistical indicators to support implementation of change initiatives, new corporate-policy objectives, or other activities."

Still another benefit of groupware, says Petrun, is that other tools in the typical groupware "toolbox"—capabilities that let participants freely associate ideas or develop common language around key concepts—allow you to capture the nuances of individual participants' views about the organization.

Says Petrun: "This can be extremely important information to have if you're trying to build consensus about a course of action, a new management approach that needs to be taken, or other efforts and activities that require a unified and concerted effort among people or departments in an organization."

Petrun believes that groupware technology can be pivotal in helping

to build consensus among the members of cross-functional groups who are forced to work together for the first time.

Tackling the challenge of change

As organizations continue to struggle with change-management issues, groupware seems destined to have an important role to play—both in helping organizations to restructure and reengineer themselves and in helping them redesign specific work processes based on new and emerging best practices.

A utility company with about 20,000 employees recently had concerns about its upcoming implementation of a new financial-management system. Would the implementation go smoothly? How could management introduce best practices to ensure that the new system would help the firm manage costs and would provide employees with key decision-making tools?

The company was determined to see significant savings and competitive advantages from the new system.

Management had committed itself to reengineering the way it planned, budgeted, and analyzed performance.

But to make it all work, employees and other system users had to development commitment, as well. So groupware was used to identify needs and build consensus about what would constitute best practices within the organization.

The technology helped a senior-management team envision the goals and objectives of the system's implementation and set some priorities. It also helped the team focus on how to gain employee support and involvement when introducing new business practices.

Attendees at a special focus-group session answered key questions using the rank-ordering tool of Ventana's Group Systems V software. The facilitator asked company managers to identify the new system's most important functions for managing costs effectively. Among other things, participants said the new system had to provide people with proactive cost-management tools. At the same time, it had to provide managers with the

information they needed for making critical business decisions.

Next, the group ranked 11 key items identified in earlier brainstorming efforts as crucial to effective system implementation.

Among other things, participants agreed that the company had to change its work processes in significant ways. For starters, it had to greatly compress the cycle time for planning and budgeting. It had to assign ownership of work processes to each of the corporation's key operating companies. And all employees had to understand clearly the organization's plans for making process improvements.

In an effort to bring employee behaviors and actions into tighter alignment with corporate goals, the facilitator asked focus-group participants to rank-order items relating to the company's performance analysis. Again, participants came up with a list of behaviors and practices to change in order to ensure successful system implementation.

What's the message in that example? Simply that groupware served as an important catalyst in helping members of a cross-functional group of top executives envision their roles as sponsors of change in their organization. It helped them create an action plan to establish processes and practices to support and sustain effective implementation of the new system. And all of that was accomplished in less than one business day—in part, because of the technology!

All kinds of groups

In the examples cited above, groupware was used to achieve consensus and establish action plans in largely heterogeneous groups.

Participants in Parker's bank session, for example, included a cross-section of bank personnel ranging from the CEO to junior managers. The group at the utility company consisted of executives, widely distributed geographically, who had rarely worked together with a common purpose.

But groupware can also be used in homogeneous group situations—to brainstorm and set priorities for an organization; to refine action plans and key implementation steps for initiat-

When and Where To Use Groupware

What's the best use of groupware in your organization? Its applications in the workplace are bound only by your imagination and your awareness of the issues your organization must address in order to become more productive and more profitable.

When your organization has a problem to solve, objectives to clarify, or questions to answer, groupware is a suitable tool to use for information gathering, consensus building, mission clarifying, or team building.

One of the biggest benefits of using groupware is that it provides you with multiple ways to manipulate data and information. You can use information to chart a plan of action, build organizational consensus, or accomplish other organizational goals.

Certainly, as organizations deal with change, groupware provides a ready means to identify key challenges, necessary objectives, and

critical milestones that must be achieved to initiate and sustain organizational changes.

Here are other potential opportunities and applications for using groupware in your organization:
▶ organizational mission and vision development
▶ business-process reengineering
▶ strategic planning
▶ team building
▶ organizational reinvention
▶ design and development of training programs
▶ conflict resolution
▶ change management
▶ organizational restructuring and downsizing
▶ development of programs for organizational survivors
▶ total-quality management or work-process improvement and redesign
▶ employee surveys and focus groups
▶ definition of information-systems requirements.

ing new projects; or to troubleshoot production, distribution, and even customer-service problems.

In the large midwestern company, for example, the groups were largely homogeneous—all were users of a problematic computer system.

Depending on the outcomes you want from a meeting, you may want to consider both heterogeneous and homogeneous groups.

Regardless of the makeup of your audience, you should consider certain factors if you're thinking about using groupware.

No substitute for people power

Whether you are facilitating a group session with a cross-level and cross-functional working group, or dealing with an audience made up entirely of salespeople, senior executives, customer-service reps, government officials, or staff people in a nonprofit organization, don't make the mistake of relying on EMS technology as a substitute for effective human facilitation of a meeting.

The kind of meeting you are facilitating will determine the amount of face-to-face group interaction needed in the session. If you're conducting a strategic-planning session, for example, you'll probably follow up each question with vigorous group discussion; participants can respond electronically.

In other cases—for example, when you are conducting brief focus-group sessions—your primary goal may be simply to capture a lot of detailed information. In such sessions, it's more important to give participants plenty of time at their own terminals to respond to each question.

Many people in business, industry, and the public sector have had only limited exposure to EMS technology—though more and more are learning and using it. Because the use of the technology is still relatively new, the role of the human facilitator in effectively guiding a groupware session is critically important.

Here are some things to keep in mind if you plan to use groupware in your organization and will be acting as a groupware facilitator:

Be prepared to deal with the technophobia of meeting attendees. Some group participants will be un-

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comfortable using a computer terminal. Groupware tends to be quite user-friendly—even for those who might describe themselves as "techno-peasants"—but you'll still need to spend time acquainting participants with the technology.

You may want to give a quick overview of the equipment at the beginning of a session, with the help of a technology expert as a co-facilitator.

Familiarize attendees with how voting is done. Teach them how to send answers and comments to the central display screen. And show them that they can see what others are writing, not only from the main screen at the front of the room, but from their own terminals as well.

Once the session is underway, you will want to monitor participants as they vote and as they move among "file folders" to answer the questions.

Guiding participants in those ways will help make the groupware technology seem "transparent" to them. The purpose of the meeting format, after all, isn't to dwell on the technology; it's to use the technology to enhance the group process, to gather information, to elicit peoples' thoughts and ideas, and to engage them in electronic dialogue.

Don't be a slave to the technology. Some facilitators, accustomed to working in traditional training settings, initially feel upstaged by groupware technology—largely because it eliminates the need to steer all group conversation personally and to record responses.

Groupware does not completely transform the facilitator's role. But it does enhance that role. You no longer have to write responses on flipcharts, but you do have to know the EMS technology well enough to answer questions about it. And you have to know the software well enough to know how to structure questions for participants to answer through the EMS system.

As you would in any meeting or training session, be sure to set the stage and expectations for your groupware session.

Learn the groupware technology and its capabilities before you actually facilitate a session with it! In fact, it's best to observe a session before trying to lead one yourself. Become thoroughly familiar with the capabilities of different EMS system.

For example, how do you want to combine the use of the EMS technology with any lecture that you plan to deliver? How can EMS technology best serve the desired outcomes of your focus group?

Answering such questions will dictate the specific EMS tools that you choose to use with your group and the kinds of data you want to collect and synthesize.

Work closely with your co-facilitator, the technology specialist. In preparing to facilitate a groupware session, it's important to spend time with the technician who will operate the groupware equipment. Together you need to develop a template of questions to ask respondents.

You also need to understand your role and the technician's role in the groupware session.

Your role will most likely be that of lead facilitator, designing the program or session to meet the session's objectives. It is the technology specialist who typically worries about

Tips for Using Groupware
▸ Expect some technophobia.
▸ Don't be a slave to the technology.
▸ Learn the technology before the session.
▸ Work with technology experts.
▸ Make the groupware work for you.

equipment setup and the actual collection and organization of information. And it is the technology specialist who compiles the findings and reports them at the end of the session.

Learn how you can best use groupware's inherent flexibility and user-friendliness to suit your own training style. You will probably prepare a format or set of questions ahead of time, but you may want to tweak or redesign your groupware session in midcourse, perhaps after the first morning of a two-day program. Again, you'll want to work closely with the technology expert to recraft the session format, develop new questions, or change the kinds of voting and rank-ordering exercises you choose to use.

For example, during a groupware meeting, participants may be confused about how to answer certain questions. When that happens, the facilitator might choose to reword those questions midway through the session. In some cases, you might even add new questions to the original set.

But avoid too much revision of your questions and format, particularly if you're conducting a series of programs or sessions over several days.

Generally, one of your goals in using groupware is to compile data from different groupware sessions, since the technology makes that so easy to do. But aggregated data is significant only if you use questions or issues that remain fairly consistent throughout the different sessions, so beware of changing too much.

Limitless potential

The flexibility of groupware and its potential to enhance both the dynamics and outcomes of meetings is almost limitless. Groupware is particularly useful for organizations that are grappling with issues of productivity, profitability, and organizational effectiveness.

Electronic meeting-support technology is not just a sensible tool to use in brainstorming problems or charting new organizational directions; it's an integral element for addressing the issues and problems that face your organization, department, or work group. ∎

Jim Clark *is a managing associate with Coopers & Lybrand's Center of Excellence for Change Management, 1751 Pinnacle Drive, McLean, VA 22103; phone 703/918-3763.* **Richard Koonce** *is a book author and an expert on career planning and development. Reach him at 1010 Ellison Square, Falls Church, VA 22046; phone 703/536-8568; fax 703/536-7821.*