

Business901 Podcast Transcription

Implementing Lean Marketing Systems



Planning Your Strategic Conversation

Guest was Chris Ertel

Business901

Related Podcast:

[Making the Most of Your Most Important Conversations](#)



[Making the Most of Your Most Important Conversations](#)
[Copyright Business901](#)

Business901

Podcast Transcription

Implementing Lean Marketing Systems



Note: This is a transcription of a podcast. It has not gone through a professional editing process and may contain grammatical errors or incorrect formatting.

Transcription of the Podcast

Joe Dager: *Welcome everyone. This is Joe Dager, the host of the Business901 podcast. With me today, is Chris Ertel. He is an innovation and strategy consultant with years of experience advising senior executives of Fortune 500 companies, government agencies and large non-profits. He specializes in the art and science of designing strategic conversations that create real impact and has co-authored a book on this topic, Moments of Impact. Chris, I'd like to welcome you and can you just start with defining why you called your book Moments of Impact.*

Chris Ertel: Howdy, Joe. Glad to be here and glad to be found. Moments of Impact, Lisa and I set out to right a book to help people understand the main problem which is, when you get a bunch of very talented people in a room together, coming at a difficult challenge from a number of different perspectives, how do you get, reliably get, value out of that? It's easier said than done. A lot of our business conversations are not that productive. We set out to try to find what were the conditions for success that create the best strategic conversations, which is our term for these meetings and workshops.

We interviewed over a hundred and twenty people and looked hard, not only in our own practice but the social science literature, best practice of a lot of other people in the field,

[Making the Most of Your Most Important Conversations](#)
[Copyright Business901](#)

Business901

Podcast Transcription

Implementing Lean Marketing Systems



practitioners, as well as other executives. What we were looking for was these what we call Moments of Impact, and a Moment of Impact is a time in the room when a bunch of people are together talking about something and they get it. They get together and they get alignment around what they need to do next. They get clarity. They get insight. They get energized. They get motivated to move forward and these moments are rarer than we'd all like them to be. They can't completely be controlled because human beings are wildly and unpredictable animals, but we can create the conditions for success and that's what we try to layout in our book.

Joe: So, are you trying to construct a dialogue before you even walk into the room? Can you explain that to me?

Chris: We're trying to design the dialogue and so that the book draws heavily on design thinking and for inspiration. Lisa teaches in the Design MBA program at California College of the Arts that span quite a few years in design-based innovation practices. We're using the core discipline of design thinking to create the conditions. You can't design the conversations per se, right, because people again are unpredictable and they'll do what they're going to do, but you can design the conditions around the conversation. So, that means creating a total physical environment, being super attentive to all the details. Most importantly, it means starting from a position of empathy, really getting into the heads and minds of your audience or participants before you get in the room.

You have a strong, a clear label and a sense for what journey this group of people needs to go on now and creating the right conditions for that to happen.

[Making the Most of Your Most Important Conversations](#)
[Copyright Business901](#)

Business901

Podcast Transcription

Implementing Lean Marketing Systems



Joe: *When I'm thinking about a strategic conversation, I'm not sure that I, thinking that I know all the players are going to be there or who all the players are going to be there, do these principles still work with, knowing only 50% of the people? Or, is it meant for internal meetings, where you know all the players?*

Chris: It's a good question because ideally you do. Ideally you will have talked to everybody in advance and all these things. I'll confess that I don't often or always get to do that myself. I usually have partial visibility on who the people are, not complete visibility. That's certainly okay but you do need to invest the time to understand their world view, their mindset. At least, look at what they've done before together as a group. Get as much as you can, intelligence as you can. It's like if you're speaking to an audience. If you go and you speak to an audience and you don't know anything about the audience, if you're a very good speaker, you could still do a good job. But if you know your audience, the odds of you connecting, of you making choices that will resonate with the group are just so much higher. We all try to know as much as we can and it's always partial, of course.

Joe: *When you bring in design thinking, the first thing I'm thinking of is empathy. I get that. I understand that but that discovery part, when I think of design thinking, are we planning to spend time in, what I would call the realm of discovery during that conversation?*

Chris: Yes and in fact, in the book we talk about this. So, I'll define, I should define

[Making the Most of Your Most Important Conversations](#)
[Copyright Business901](#)

Business901

Podcast Transcription

Implementing Lean Marketing Systems



strategic conversation, at least those we use that is all in the book. In the book we talk about this distinction we got from Ron Heifetz. He's a professor of Leadership at the Kennedy School of Government. Ron makes the simple distinction between adaptive challenges and technical challenges, and technical challenges are those where you can define the problem very clearly and involves using familiar skills. These technical challenges can be extremely complex, like a big software project or building a bridge or brain surgery, but you basically know the terrain you're on and you'd have to work your way through it, step wise. Adaptive challenges, by contrast, are ones where we don't only necessarily know the answer but we're not sure they have the right question. These can be questions and challenges like, why is our business model eroding, why are our profits failing, why is talent not coming to us the way they used to, why are some of our customers less happy than they used to be.

Those kinds of important challenges often involve group learning and discovery, as you say, you need to learn your way into not just the solution but the problem and to do that, you need a wide range of perspectives. It starts with empathy and then it also leans into diversity of opinions, in a way that's productive rather than trying to iron out our differences.

Joe: *The interesting you talked about is you got this group of talented people there. I think one of the first things you assume that you're not the smartest person in the room, right. I mean, that's a good thing to start with.*

Chris: Yes. In the old saying, you know, 'none of us is as smart as all of us.' So, that's a

Business901

Podcast Transcription

Implementing Lean Marketing Systems



big part of the inspiration as well.

Joe: *I'm thinking that if I'm reading a book about how to have strategic conversations is, I'm not scripting things but I, I'm certainly may be scripting some of that meeting. But, when I have this big group of talented people, we don't need that much scripting, do we?*

Chris: Yes, scripting is not at all in the spirit of the book. I mean, we're not, this is not a theatrical performance. It's not meant to be scripted at all but it is meant to be staged and the distinction, again I'll say this, it's just you're creating the conditions around the conversation, so that you have an open conversation of discovery that is effective and for that, you do need to create some boundaries around the conversation. You need to provide some simple frames, framework for people to connect ideas, to enable them to think systemically and those kinds of things. If you don't have enough structure, right, the odds of getting where you want to get to are not great, but similarly if you over engineer things, that's way too many meetings are run today or you just got 15 minutes on this, a half an hour on that, a half an hour on that, but there's an agenda that makes sense but it doesn't feel good, it's just a kind of death march through a bunch of stuff.

Joe: *We always talk about co-innovation and co-creation, everything's co now, and does the book lend itself to this type of thinking. Are we trying to get this out of the conversation that is, to co-create something?*

Chris: That's what the entire book is about. It's creating the conditions and I should probably start giving specific examples before it gets too abstract. The core premise I

[Making the Most of Your Most Important Conversations](#)
[Copyright Business901](#)

Business901

Podcast Transcription

Implementing Lean Marketing Systems



would say, like how you create a effective moment. It's about thinking about these conversation as shared experiences. So, you're designing an experience. You're not organizing a meeting. Of course, to some degree you are organizing a meeting. You're figuring out a room and getting participants there and so forth, but designing an experience has a completely different feel to it.

Let me give a brief example of a fairly recent situation where we had a government agency that had a big complex strategic plan and the plan was already in place but it's pretty complicated. It has a lot of different initiatives, having over 40 initiatives in a strategic plan, right, and you have a leadership team of about 15 people and so, and the purpose of a meeting is for them to align about how they're going to execute and deliver, hence, the plan together. You can imagine that just breaks down at the complexity, right, how can you talk to 15 people about how you're going to get 40 plus initiatives successfully executed. It's a very hard thing to do. So, what we did in that situation is we created, we simulated, we created a bunch of different specific situations that forced these initiatives to come crashing into each other and so, we set off what we call in the book, we ignited a controlled burn. I can fire fight and reset-off small fires in order to protect people against larger, much larger lines. We created conflict under very safe situations, to say, look these kinds of things are going to come up. You're going to have to make real time choices about allocating resources here or there because you can't prioritize 40 initiatives all at the same level. You have to make choices. And so, we used a whole bunch of simulations and worked them through the simulations to come to a group agreement about what are the top priority initiatives among all of these and how are they going to help each other out.

[Making the Most of Your Most Important Conversations](#)
[Copyright Business901](#)

Business901

Podcast Transcription

Implementing Lean Marketing Systems



That's an example of a strategic conversation that's designed. It's still going to go where it's going to get. We weren't scripting anything. We didn't prescribe the results at all but they have much more realistic conversation because we were playing with live ammo as it were.

Joe: *In the book, you basically put out a nice pattern to follow and I think you have 5 different items to design a strategic conversation. Could you just briefly describe what those five are?*

Chris: We have the five core principles that shape our process. The first is to define your purpose. Defining a purpose in a nutshell means having a very clear vision of what is the state of mind and the state of progress people are walking in the room with on the particular issue that you have. We're having a clear vision of where you want them to land, where you want them to come out. And again, that's not in terms of the specific outcome but the nature of the outcome, like we want them to be aligned about x, y, z and having a really clear vision on that.

Second is what we call 'engage multiple perspectives.' That's the piece about, usually when we have differences, differences of opinion wherein either people are tamping it down, they're ignoring their differences in order to get along or they're in conflict over them, and we need to create an environment where people openly discuss their differences of opinions and employ them out in a productive way.

Third is to frame the issues and that's bringing one or two, not too many, but just a couple

Business901

Podcast Transcription

Implementing Lean Marketing Systems



core frameworks in any conversation that enables system thinking, that enable people to connect the dots between different parts of the problem more readily.

Fourth is to set the scene and that's thinking about all the elements of the environment. So, whether it's the handouts that you used, the room that you used, everything needs to be congruent and create the kind of environment, the kind of emotional feeling effect that you want for this group to collaborate in a relaxed way.

Finally make it an experience means that to tap into not only people's logical selves, but their emotional/psychological selves as well. Like the example I gave with the strategic alignment, with the executive group. They needed to have an experience of what it would feel like to deliver on this plan in the face of specific situations and that gets them to another level. So, those five things together, are what we do to design a strategic conversation.

Joe: *Which one is the most difficult?*

Chris: I think, probably the hardest one to write about was frame the issues because it's a bit abstract. It's hard to teach the art of framing. That's something that you learn over time working with a lot of different kinds of data and just having a simple model that helps people think about the issues.

I would say the hardest one to do and practice in reality is the engage multiple perspective piece. That's where, you know, any given group is going to have significant differences of

[Making the Most of Your Most Important Conversations](#)
[Copyright Business901](#)

Business901

Podcast Transcription

Implementing Lean Marketing Systems



opinion and a lot of that is in the facilitation skill. The way that a good facilitator will tee up potentially hot issues in a way that's neutral, productive, inviting and not setting off fires that are too big, bigger than they can handle.

Joe: *I think it's interesting that you put a lot of time and effort into what you call a starter kit. Could you explain that section of the book and why you did it?*

Chris: Thanks for pointing that out. The first hundred and seventy or so pages of the book is a narrative. It just, it lays out our theory of all this and tells a lot of stories from practice work, about how this works. And then, there's a 60-page starter kit and what we did there is we organized what we think of the greatest hits, tips and tools for people to use, organized by the 5 core principles and I'm sure it's been done before somewhere else but I haven't seen it quite like this before. It sometimes at the end of chapters, you'll see, bullet points summarizing the main points. Here, what we've done is build that out into a separate document that people can use after they've read the book, you can pick up anytime and scan this and get the main points that you need to run a great session and if you don't have time to read the book, you can probably do that anyway, but I still encourage folks to read the book.

Joe: *Why I found it interesting, because I went to the 60-page starter kit and looked through it after, I read the book a couple of months ago. Early June, late May or something and before the podcast I grabbed the starter kit and took a look at it and I found myself, taking parts of it. "Oh, this is, I can do this," and then there are certain parts that I just blanked out so it was great to go back and reference to it, and it actually pulled me back*

Business901

Podcast Transcription

Implementing Lean Marketing Systems



into the book. I should be doing some of that stuff.

Chris: I'm glad it was helpful to you. We've gotten a lot of positive feedback on the starter kit aspect in particular.

Joe: *How should the book be used? Is this, as you said, you get a bunch of talented people together and you create a strategic conversation but could it be used in other arenas? Could it be used in weekly meetings? Should I be using some of the points in it or, how should I use the book?*

Chris: I think there would certainly be things you could take a way, after you have a standing meeting and that sort of thing, you would be able to take some things away. Its highest value is going to be when the stakes are high, when you have these complex situations, that's when it's going to help the most.

I can give you a reader's essence, a kind of trade craft that's involved to, though, from a regular meeting because I was involved in a regular meeting. Recently, somebody brought me in and said, "Hey, can you just help out with this," and it wasn't a very complicated situation. I said, "Sure," and in that situation though, one little intervention that I did that's consistent with the spirit of the book is they had some survey results that they wanted to share and the survey results were, it was one slide and had 11 questions and each of the questions had an answer against, an average number against it. These were the survey data was from customers of the group who was in the audience, so it was important to them and some of the findings were actually quite surprising. There were some negative

Business901

Podcast Transcription

Implementing Lean Marketing Systems



findings in particular, that were disappointing and surprising, and they had it just on one slide and they were just going to show the slide and have a conversation about it which is pretty straight forward, and I thought, well, that's not such a good way to go about that. So, let's have a little more drama to this.

I had them give each, we had 20 people in the room, we split the room into four teams of five people and each team got one big flip chart with the 11 questions on it and then they got post-its that had the 11 answers, the 11 values and we asked them to match the two. So, it's to rate them like how do you think we rated with our customers in each of these 11 things. They each did that little quick exercise and that was pretty energetic. And then, what I did at the front of the room was I read the answers, the real answers that the customers gave going from the things that they were the best at to the things that they got the lowest response to. So, that created a moment of drama. It's like the first one is like, "Hey, good news. You got 5 out of 5 points on this one. You know, pat yourself on the back, all these good stuff, then the next one, the next one, the next one, then the scores start getting low and there're some big issues remaining. We touched the last ones, they were very surprised. The people who had the highest scoring team on the matches got 5 out of 11 right. With that we launched a good conversation. What I found in other situations that if you share survey data like that, just cold and don't make people guess or think about it a little bit in advance, they will always almost say, "We knew that," after they see it. You need to establish the expectation that they have first and then show the results in contrast to that, for them to really make meaning of it and in this case it was pretty effective.

[Making the Most of Your Most Important Conversations](#)
[Copyright Business901](#)

Business901

Podcast Transcription

Implementing Lean Marketing Systems



Joe: *I think that's a great tip and what you remind me of, as you've mentioned before, you're really designing an experience for that conversation?*

Chris: Right. That's right. You're thinking about the user and you're thinking how are they going to react to this data? What is the way of bringing this data to them that will have the maximum impact, where they will hear it the most clearly? And so, flipping the lens, not thinking about you as a presenter. Not thinking about the data but thinking about the user.

Joe: *And so, in designing this experience or designing the conversation as you say it, sounds a little like of how you engage students in a project or a classroom.*

Chris: That's a great catch. It's great teaching skills and both, Lisa and I, are passionate about teaching. We both know the literature on learning theory and teaching and yes, absolutely, that's a major part of the inspiration here.

Joe: *I'm a lean guy, I think of continuous improvement cycles and I think of PDCA and the thing that you always try to tell everybody is that the P, the planning part should take 50%, of the time spent for that cycle. In today's world, it doesn't seem possible anymore and what you're saying is not maybe 50% of your time should be spent in the planning before, before this meeting or strategic conversation, but you really need to do your homework and lay this out.*

Chris: Absolutely and one of the principles we've said in the starter kit that or, towards the end of the book we talked about 'to prep like hell, then let go' and that you need to do all

Business901

Podcast Transcription

Implementing Lean Marketing Systems



this advanced work and you need to really think it through and to your earlier point too, then when real people are in the room, you have to be responsive to that, not stick to your plan. Against all cost and odds but to be responsive to the room and that's a big part of the art of delivering these.

Joe: *I think the better prepared you are, the easier it is to go with the flow.*

Chris: Absolutely.

Joe: *You know, you're not trying to force issues down. You're able to leave, leave-go and let them go where they need to go.*

Chris: Absolutely.

Joe: *Does a lot of this planning, does it involve the people you bring into the room? Are you sitting there trying to select a mixed group to have a strategic conversation, is that important part of the planning?*

Chris Ertel: Absolutely and we talked, in the chapter on engage multiple perspectives, we talked a good deal about how to think about selecting the participants and there's, we talked a lot about the difference between what we call the must-invite team and the dream team. If you have a big challenge, if it's truly an important challenge, you need the dream team in the room and the must-invite team is the politically correct choice of participants, right, and that, you know, there always are political realities in any organization, you can't

[Making the Most of Your Most Important Conversations](#)
[Copyright Business901](#)

Business901

Podcast Transcription

Implementing Lean Marketing Systems



get away without inviting so and so, even though he or she may not be fairly helpful with the question at hand. But, there's techniques to get as close as you can to the dream team and that involves interviewing people ahead of time, who don't need to be at the meeting but whose input you have to take, whose buy-in you need in some way to perform. In bringing people in virtually, whether it's by video or by audio, who are, who can make unique contributions to part of this conversation and if not all of it. So, we give very specific guidance about the different ways to shape the group of participants because that is one of the absolute key success factors of having as close as possible to the right people in the room to solve the problem.

Joe: *How much of it is that opening 5, 10 minutes and frame in that meeting? I have to ask you that because I think of that impact, that James Bond moment that you need to grab the people's attention. Do you need to put that in? I mean is that something you really should plan for?*

Chris: That's an interesting question. I mean, this is a cognitive bias. So, we have a cognitive bias surround both the entry point and the exit point. I would say, in general, I mean yes is the short answer, although if I had to choose between overworking the beginning and overworking the ending, I would pick up the latter. I mean because in some way the first five minutes definitely sets the expectations and, in particular if you want it to be a different kind of meeting that people are used to, you need to set that, establish that from the outset. But that said, groups take a while to warm up and it's okay if a meeting starts out in a fairly routine way and then it unfolds over time in a more creative direction and a different direction. I think you can make that transition. What's very hard to say if

Business901

Podcast Transcription

Implementing Lean Marketing Systems



it's a bad ending. If you have a bad ending, you just killed the last 7 or 8 hours because of peak end, what's called peak end bias, in cognitive bias literature. And so, if I had to overwork one or the other, I would overwork the preparation of the ending.

Joe: *Now, I'm a sales and marketing guy. Can I use this in sales?*

Chris: I think so, but I would, you know, I would use it with a sales team. It's a collaborative tool, right. I probably wouldn't use it quite so much with your customers, although there are situations where you might use it with your customers. If, for example, you wanted to bring together some customers and talk about what are new sources of value that you could create for them. This would be an ideal tool kit for that kind of conversation. Not for a routine sales call, I don't think, but for a deeper conversation with your customers about what do they want next from you, how can you help them better, and so forth. And then, with your sales team, if you're on a team, I think having getting people together to make observations across the system and say, "What are we seeing out there in the market today? How can we adjust course? How can we work better as a team?" Again, this is an ideal tool kit for that kind of interaction.

Joe: *How would you, now should you sum up the meeting and who should help you sum up the meeting if you should? I mean should you sit there and sit back at the end of it and take a deep breath and say, "Wow, this is what we accomplished."*

Chris: Yeah, that's a great question. I think it's important and ideally the ending should be driven, either by the facilitator or the leader of the group. Right, if they're assuming

Business901

Podcast Transcription

Implementing Lean Marketing Systems



that there is one and the leader doesn't have to be the person with the most formal authority. Although, it certainly could be and often is but I think somebody, it does help better when somebody synthesizes, pulls together, validates, reflects back to the group what they've just accomplished together. That always helps.

Joe: *Well, I was told a long time ago is that you should always volunteer to sum up the meeting because then, your opinion always became the strongest one out there. "Oh, that's what was said, okay."*

Chris: Right, the power of the pen.

Joe: *The book has been out a few months and what have you learned as a result of it? Has someone asked you a question, you said, "Oh, I wish I would've included that," or anything has changed your mind?*

Chris: Yeah, that's a great question. I would say because I, we came out with the book early this year, as you've said I've been in practice, you know, non—stop ever since and I would say probably the single most common intervention that I do with teams and these days I'm a Director at Deloitte, so I hang my hat there and I work with account teams and the default setting, around any practice could, around agendas is a lift approach, like "here's a list of things we need to accomplish in the meeting," and I think just the single most simple, you know, meaningful intervention that I do when I come in and I look at where something is.

Business901

Podcast Transcription

Implementing Lean Marketing Systems



Let's take this agenda list and convert it to a flow, convert it to an experience and the simplest way to communicate that is to think in terms of a 3-act play. You should ask them maybe "Have you been to a movie?" You sit down in a movie theater or at home and there's an establishing sequence at the opening, right, so there's some things that happened. You realize, okay, this is who these people are. Here's what's going on, then something happens, right, and it gets the ball rolling and things start moving in a particular direction. Then, there's a plot twist and it moves in a different direction. You need to think more that way if you're having a whole day with a group of people. Think, in terms, of a beginning, a middle, an end and what are the 3 discrete, chunks of time that you want to think about that have a different flow to them and put that in, that connect to each other and think about the transitions between them and we didn't really quite, we do talk about that in the book but the 3-act play, simple metaphor is what I've used in practice as self-defense, to quickly communicate how to actually do this.

Joe: *Where can I find more about the book and connect up with you?*

Chris: We have a website, momentsofimpactbook.com on the web and you'll see you can connect with Lisa and me through the website easily. The book's available everywhere at this point. It's an audio as well and recently launched in Dutch, if that's what you want and it will be coming out in Chinese and Russian as well.

Joe: *I thought it was an entertaining book and I am somewhat disappointed that I got it on Kindle because I think it would be one of those dirty books on my bookshelf, where I'd creased the corners and marked it all up. Now, it's just hidden in there on Kindle.*

[Making the Most of Your Most Important Conversations](#)
[Copyright Business901](#)

Business901

Podcast Transcription

Implementing Lean Marketing Systems



Chris: Oh, I'm glad you found it. We enjoyed writing it and we've gotten, we've had a fun time taking it out to the world and get to see and knowing people's reaction to it.

Joe: *Okay, Chris. Well, I would like to thank you very much and this podcast would be available on the Business901 iTunes store and the Business901 blog site. So, thank you, Chris.*

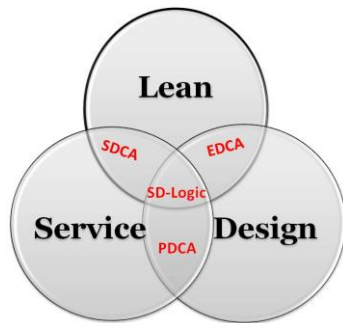
Chris: Alright. Thank you very much, Joe.

Business901

Business901

Podcast Transcription

Implementing Lean Marketing Systems



Joseph T. Dager

Business901

Phone: 260-918-0438

Skype: Biz901

Fax: 260-818-2022

Email: jtdager@business901.com

Website: <http://www.business901.com>

Twitter: [@business901](https://twitter.com/business901)

Joe Dager is president of Business901, a firm specializing in bringing the continuous improvement process to the sales and marketing arena. He takes his process thinking of over thirty years in marketing within a wide variety of industries and applies it through Lean Marketing and Lean Service Design.

[Visit the Lean Marketing Lab:](#) Being part of this community will allow you to interact with like-minded individuals and organizations, purchase related tools, use some free ones and receive feedback from your peers.

[Making the Most of Your Most Important Conversations](#)
[Copyright Business901](#)