

## Starting Point

The Managing Partner of a leading consulting company for project management and process optimization contacted us at the end of 2007. He asked to work together with the consultant in charge of an important project that had run into difficulties and help him prepare a meeting with the customer which was likely to be conflictual.

The project was about selecting a particular project management tools. The people involved on the customer's side had extremely different views on how to address the issue and it was to be feared that they would not reach an agreement, thus bringing the success of the project into question.

## Our Role

- First phase (Sumbiosis® Plan):

As the time available was very short, we met the consultant in charge at short notice and asked him what he had planned to do during the upcoming meeting with the customer. He had prepared a hundred forty two (!) slide PowerPoint presentation, which he intended to go through from A to Z. We suggested that confronting the customer with such a comprehensive one-way presentation was most probably not the best way to address the problems which needed to be resolved.

We did instead work out a series of questions: What happened up to now? What is the customer's perception of the problem? What could be the purpose of the upcoming meeting? Who will participate in the meeting and why? Which tasks should be accomplished during the meeting from the point of view of both parties? What should be achieved at the end of the meeting? How could the meeting be structured accordingly? What should be done prior to the meeting in order to increase the chances of success?

- Second phase (Sumbiosis® Pilot):

Towards the end of our conversation, the consultant asked us whether we could help him facilitate the upcoming meeting at the customer's site. Based upon the questions which we had just worked out, we then prepared a detailed agenda. We decided to structure the meeting as a multi-phase workshop, during which the consultant would lead the discussion as far as the substantial issues were concerned, whereas we would take care of the process. For each single phase of the meeting, we prepared a flipchart with an opening question and a structure which would allow us to capture the respective inputs and opinions of the participants. This helped us see quite clearly how we could make the transition from one phase of the workshop to the next. We were well prepared to focus on the key points and avoid losing track. The PowerPoint presentation was also not lost. We divided it in several "packages" which we knew we could use if needed to support the discussion of certain topics.

## Results

- First phase (Sumbiosis® Plan):

The consultant discovered a totally new way of preparing a meeting effectively. We succeeded in motivating him to restructure completely the very comprehensive preparatory work which he had already done. Furthermore, he changed his perspective from getting himself prepared to show customers what a solution should look like, to getting ready to work together with them in a spirit of joint problem solving and joint decision making.

- Second phase (Sumbiosis® Pilot):

During the meeting itself, it became evident quickly that the participants on the customer's side strongly wanted to express their own thoughts and ideas. Making a long presentation to them would most probably not have been well received. Addressing constructively the issues which needed to be resolved would then have been much more difficult.

Our approach helped the participants structure their ideas and keep the ultimate goal in mind while they were discussing. Every time an input was required from the consultant, we wrote on a flipchart the question to be addressed and the corresponding expectation, and then we used the relevant PowerPoint slides to address it. The consultant was initially afraid that his technical knowledge of the subject would not stand out enough. The reactions of the participants showed him however that his selective and targeted interventions had much more impact.

During the feedback round, the participants on the customer's side as well as the consultant stated that the outcome of the meeting exceeded their initial expectations. They had all feared an endless discussion and were therefore positively surprised to be able to have such a deep and comprehensive exchange of views, and still reach an agreement on the next steps which everybody really adhered to.

The participants especially appreciated the way we had distributed our roles (one person taking care of the content, the other one managing the process). They felt that they had been able to keep their own style without being forced into a contrived workshop atmosphere. Thanks to this kind of facilitation, they had never lost sight of the golden thread running through the meeting, which helped build bridges between the different points of view.

They expressed the wish to organize such kind of meeting again in the future.

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