

Table I.1. Meeting Design That Supports Servant Leadership

Chapter	Topic
1 	<i>Serving:</i> Resistance to change, importance of knowledge transfer, and the immense value of meetings based on clear thinking, servant leadership skills, and structured meeting design
2 	<i>Leading:</i> Critical disciplines including line of site, consciousness about different meeting roles, the nature of organizational alignment, and foundation of structure
3 	<i>Facilitating:</i> The indispensable servant skills that make it easier for meetings to get <i>DONE</i> faster through active listening, precise questioning, and timely challenging
4 	<i>Collaborating:</i> How to transform conflict into consensus leveraging the objectives of the product, project, department, business unit, and organization
5 	<i>Structuring:</i> Using a masterful <i>Launch</i> and <i>Wrap</i> for all sessions, modifying pre-built agendas and creating your own, and building fully scripted <i>Annotated Agendas</i> through structured conversations and vigorous preparation
6 	<i>Planning:</i> A fully integrated session that builds consensual plans about <i>who</i> does <i>what</i> by <i>when</i> to meet or exceed goals, key results, and other objectives
7 	<i>Deciding:</i> Proven <i>Tools</i> for galvanizing decisions and consensual agreement around purpose, criteria, options, and priorities throughout simple, complicated, and complex situations
8 	<i>Solving:</i> Field-tested <i>Meeting Approaches</i> and <i>Tools</i> using numerous creative activities for securing consensual agreement around innovative actions and solutions to embrace
9 	<i>Controlling:</i> Live and real-time sessions, hybrid in-person and online sessions, remote sessions, and virtual sessions and their differences. Support from “hip-pocket” <i>Intervention Tools</i> for special and unplanned meeting challenges
Appendix 	<i>Supporting:</i> Substantial and vital supplements such as the golden rule and the “silver rule,” <i>Quick References</i> , and a list of <i>Tools</i> and where to find them, followed by a glossary and bibliography

Table 1.1. Knowledge Transfer Molds the Optimal Leadership Technique

Information Storage	Knowledge Transfer	Leadership Technique
Bard	Oral	Steward
Book	Print	Manager
Documentary	Broadcast	Executive
Cloud	Digital	Facilitator

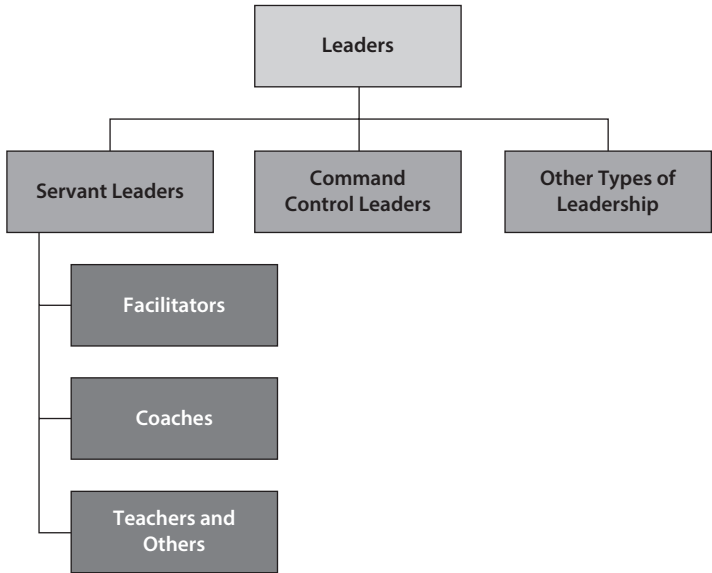


Figure 1.1. Hierarchy of Leadership

Table 1.2. Characteristics of the Facilitative Leadership Difference

Modern Leaders	Servant Leaders
Are content experts, based on position and power	Are context experts, based on credibility, genuineness, and inspiration
Are involved in directing tasks	Facilitate plans and agreements based on group input
Communicate and receive feedback	Structure activities so that stakeholders and team members evaluate them, their leaders, and one another
Have some meeting management skills	Are skilled in using groups to build complex outputs by structuring conversations based on a collaborative tone
Remain accountable for results	Transfer ownership so that members are highly skilled and accountable for outcomes
Value teamwork and collaboration	Focus on removing impediments while providing procedures that fortify self-organizing teams

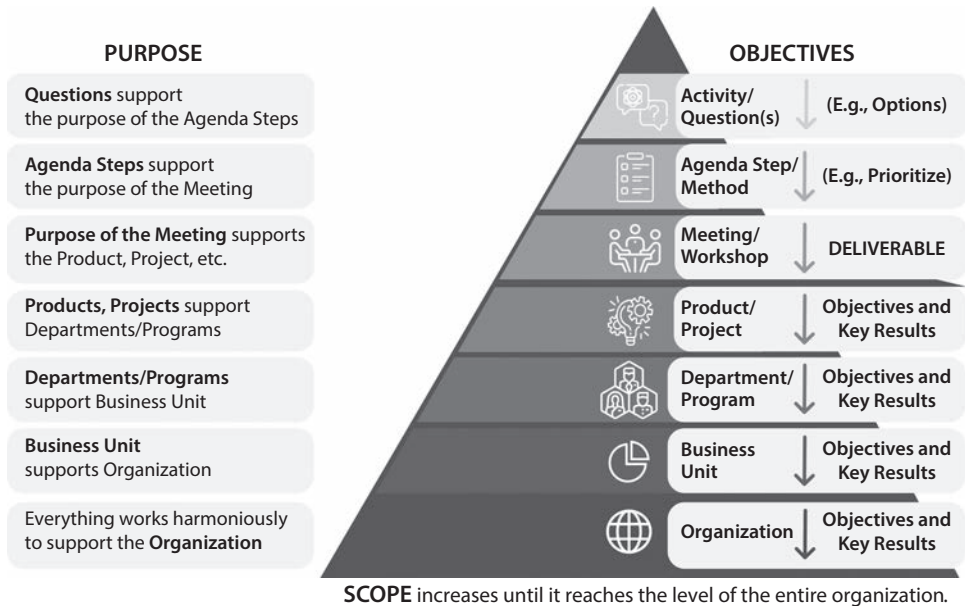


Figure 2.1. Organizational Holarchy of Alignment

Table 2.1. Trichotomy: Structuring Thoughts (Abstract) into Actions (Concrete)




Level of Structure / Topic	First 	Second 	Third 
Trichotomy	Will	Wisdom	Activity
Apocryphal	Thoughts	Words	Deeds
Beliefs	Head	Heart	Hands
Governance	Policy	Rules	Procedures
Intelligence	Strategic	Tactical	Operational
Life cycle	Planning	Analysis	Design
Plato	Logic	Rhetoric	Grammar
Logic	Why	What	How
Use case	Input	Process	Output

Table 3.1. English: A Mash-Up of Words from Major Languages

National Origin	Term	Original Meaning
Arabic	Sofa	Seat
Cantonese	Ketchup	Tomato juice
Japanese	Shogun	General
Malaysian	Amok	Rushing in a frenzy
Mayan	Hurricane	Mayan god, Huracan
Persian	Caravan	Traveling company
Turkish	Kiosk	Pavilion

Table 3.2. Similar Yet Different

Anglo-Saxon	French	Latin / Greek
Ask	Question	Interrogate
Dead	Deceased	Defunct
End	Finish	Conclude
Fair	Beautiful	Attractive
Fast	Firm	Secure
Help	Aid	Assist
Meeting	Reunion	Convention

Table 3.3. Seven Formats, from Most to Least Complex

Graphic Format	Defined	Example
Poster	A central theme	To announce the meeting, date, time, place, and purpose
List	A sequenced list of ideas	To list items that must be done before the meeting
Cluster	An arranged collection of ideas	To organize the items listed into appropriate groups
Matrix	A forced comparison of ideas	To associate a role with a specific assignment
Diagram	A model of an idea	To lay out the meeting room in two dimensions
Picture	An analogy or image of the idea	To illustrate a 3-dimensional view of the meeting room
Mandala	A unifying, centered image	To combine elements together showing how each relates to the core and to each other

Table 3.4. It's Easier to Have a Conversation

<i>Conversation</i>	Active Listening
<i>Make contact</i>	Make contact
<i>Absorb what is being said</i>	Absorb what is being said
<i>Move on to the next question</i>	
	Feed back rationale supporting WHY it was said
	Confirm that your reflection is accurate and complete
	Move on to the next question

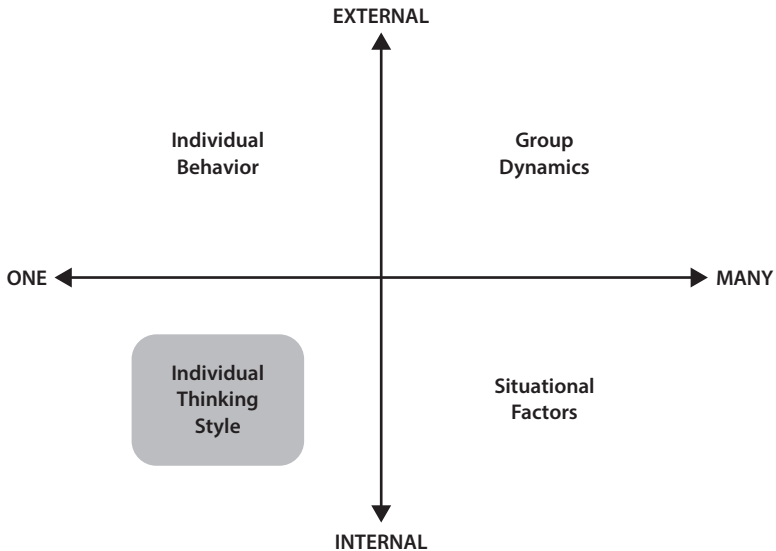


Figure 4.1. Individual Thinking Style

Table 4.1. Critical Thinking Comparison

Vertical Thinking	Horizontal Thinking
Explains the “plot” when describing a book or movie	Explains the “message” when describing a book or movie
Finds differences	Finds similarities
Fits into structure	Prefers the unstructured
Looks for risks	Looks at the benefits
Processes language	Processes visually, sees patterns
Seems logical	Seems intuitive
Thinks sequentially	Thinks nonsequentially

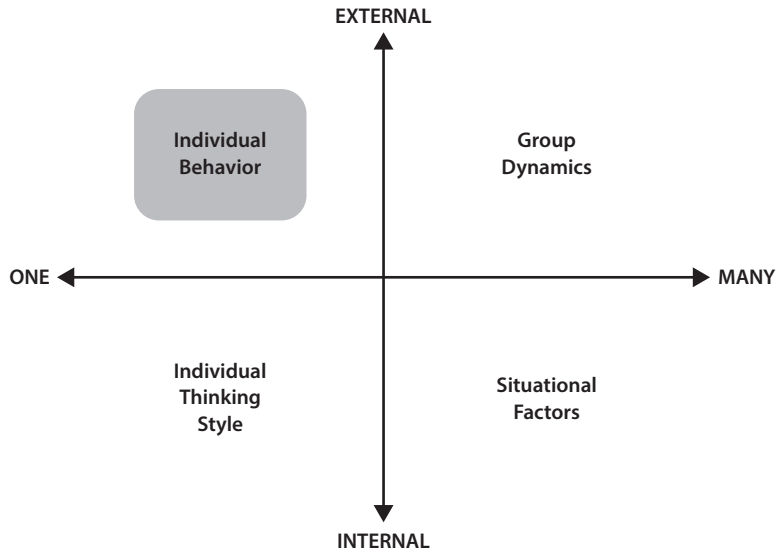


Figure 4.2. Individual Behavior

Table 4.2. People with Problems, or “Wait—Why Am I Talking?”

Title	Characteristics	What to Do
Can’t Stay	Jeopardizes progress and damages morale by leaving meeting early	They may have a legitimate reason such as another meeting, day care pickup, or van pool departure. Understand constraints before the meeting begins and schedule accordingly.
Cliquer	Close friends who whisper during meetings and hold sidebar conversations	Standing close to Cliques will stop their conversation. Enforce “one conversation at a time” <i>Ground Rule</i> . Also enforce this rule if you sense too much private online chatting.
Controller	Keeps telling the meeting facilitator what to do—or not do; attempts to control the meeting by changing the activities and procedures	Listen first; however, never turn over control. Talk to the Controller during breaks. Enforce scope carefully to avoid scope creep.
Disapprover	Actively expresses disapproval using body language and nonverbal cues such as rolling eyes, shaking head, crossing arms, and so on	Move near the Disapprover. Direct open hands in the person’s direction, seeking viable counter-positions. Gently call on online participants by name, but always give online participants the option of saying “pass” whenever called upon.
Disengaged	Constantly engaged with their smart phones or laptop; ignores the facilitator; may read unrelated materials	Use laser focus so that the Disengaged person knows you see him or her. During breaks, talk to them. Do not publicly call out their name. Encourage your culture to embrace the “topless meetings” <i>Ground Rule</i> that prohibits laptops and handheld devices. For online violators, send a private chat.
Genius	Uses credentials, age, seniority, or stratospheric intelligence to argue his or her point	Writing down the Genius’s input fully will satisfy him or her. Interrupt Geniuses who repeat themselves, reading back to them what you have. Carefully challenge them to explain how their contribution relates to the question at hand (to avoid scope creep).

(continued)

Table 4.2. (continued)

Title	Characteristics	What to Do
Impatient	Jumps into the conversation and cuts off someone else; acts impatient or concerned that his or her ideas will not be acknowledged	Interrupt Impatient participants immediately to protect the person interrupted, but do not forget to return to them later. Impatience is preferred over apathy.
Monopolizer or Randomizer	Talks often and loudly; dominates conversations and is difficult to shut up; may be someone who has a higher rank outside of the meeting than others	Record input if in scope of the question at hand. If not in scope, ask Monopolizers to write the question down so they don't forget it when you turn to them later. Use <i>Breakout Teams</i> (chapter 6) and round-robins to prevent the opportunity for them to dominate.
Quiet Person	We are not going to convert quiet people into extroverts, but five activities will transform the quantity of contributions from quieter participants	<ol style="list-style-type: none">1. Interview your participants2. <i>Breakout Teams</i>3. Nonverbal solicitation4. Reinforce during break5. Round-robins and Post-it note techniques
Repeater	Brings up the same point repeatedly; tries to focus airtime on his or her issue	Repeaters need to understand that their point of view has been captured. Document their input. Show them visually that you “got it.” When they begin to repeat themselves, interrupt them and read back what you have. Ask them, “What would you like to add?”
Skeptic	Voices skepticism shrouded with genuine concern; may degrade someone else's performance	Use the “What—So What—Now What” <i>Content Management Tool</i> (chapter 9). Skeptics may justify their skepticism with facts or examples. Through conversations in advance of the meeting, anticipate them speaking up and give them an optimal time to bring up their concerns. Skeptics offer more value than someone apathetic or quiet.

Table 4.2. (continued)

Title	Characteristics	What to Do
Snoozer	Challenged to stay awake, especially early morning or around 3 p.m.	Enforce the “no hiding” <i>Ground Rule</i> for online participants who must open their video windows. When in person, walk around the room or take a quick ergonomic break.
Spinner or Twister	Speaks for someone else; twists ideas or meanings and frequently distorts them when interpreting	First get the original speaker to confirm you received his or her input correctly and then offer the Spinner time to add his or her own point of view.
Tardy	Arrives late and may insist on catching up with what he or she missed	Use 50-minute meeting intervals to allow people some transition time between back-to-back meetings. Enforce “be here now” and “no hiding” <i>Ground Rules</i> . Do not interrupt the meeting. Review material during a break or after but not during the meeting—or pair participants off with someone else to give them a recap in the hallway or chat room.
Unexpected	Shows up without an invitation	Explain and enforce the role of observers, noting that they may speak during breaks or after the session has completed.
Verbal Attacker	Launches verbal, personal attacks on other group members or facilitator; ridicules a specific point of view	Stand between two people arguing. Immediately interrupt online attacks and mute the attacker if necessary. Make sure comments remain professional and not personal.
Workaholic	In and out of meetings; gives impression of being so important he or she is missed elsewhere	Treat the same way as someone who fits the Tardy or Can't Stay descriptions; enforce the “be here now” <i>Ground Rule</i> . Allow frequent bio-breaks, even when meetings are online, for people to respond to bodily needs and their electronic leash requests.

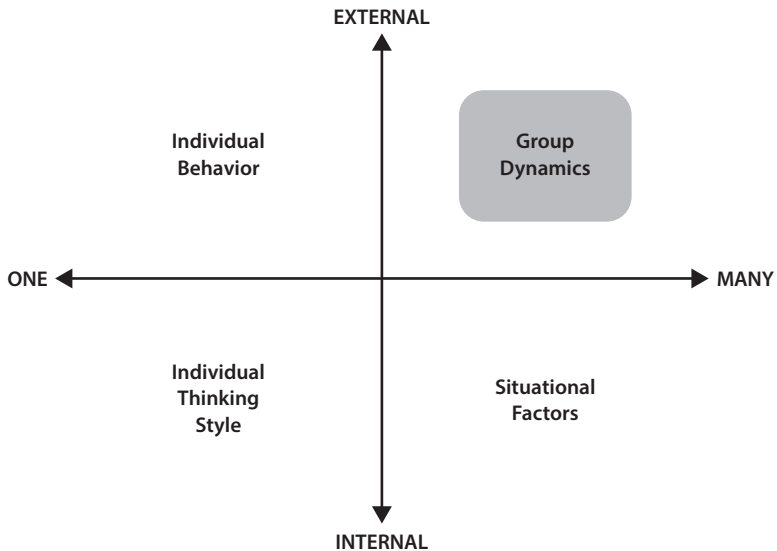


Figure 4.3. Group Dynamics

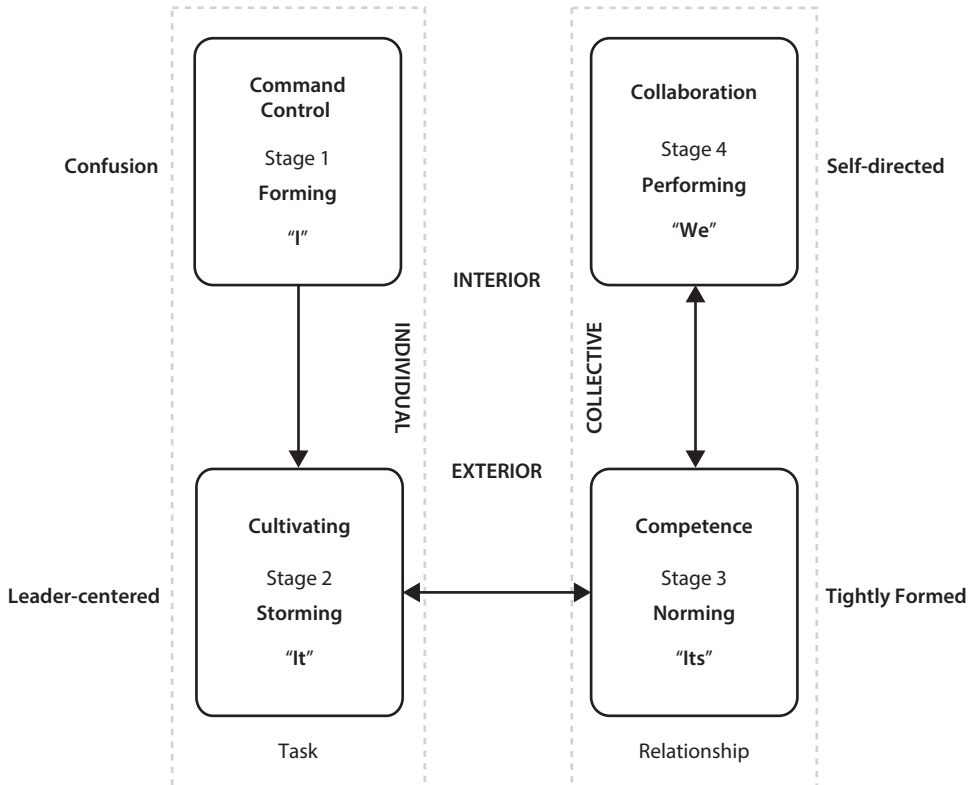


Figure 4.4. Four Stages of Group Performance and Individual Consciousness

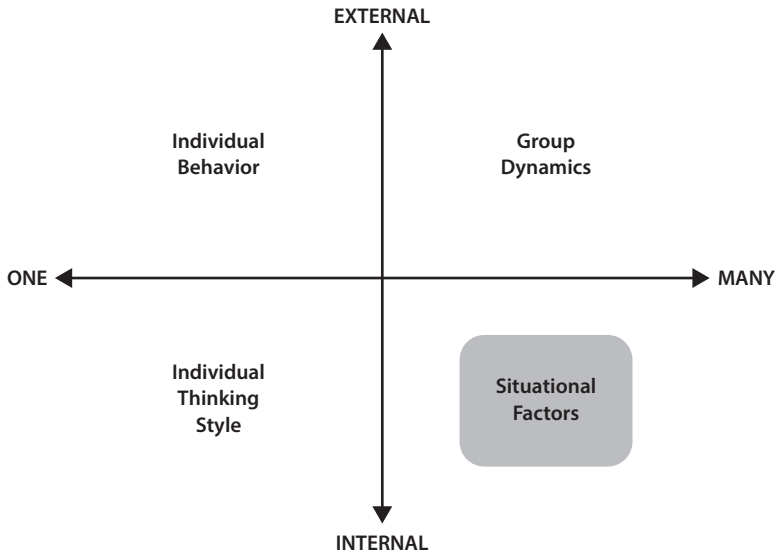


Figure 4.5. Situational Factors

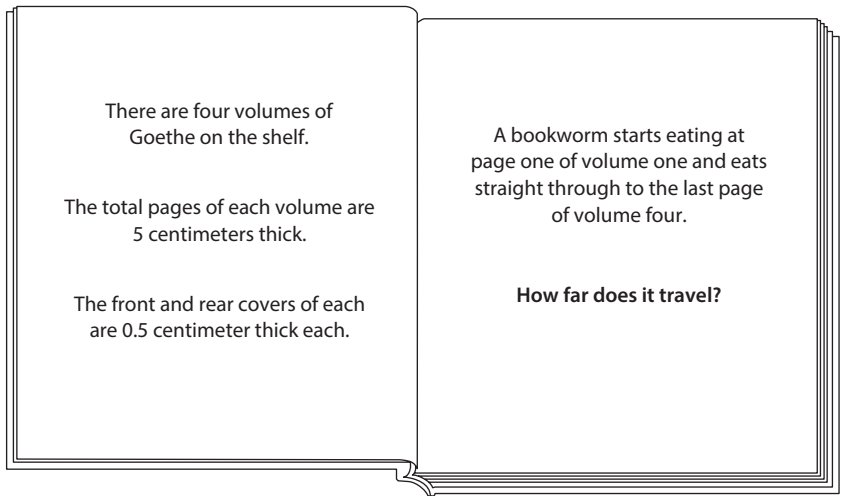
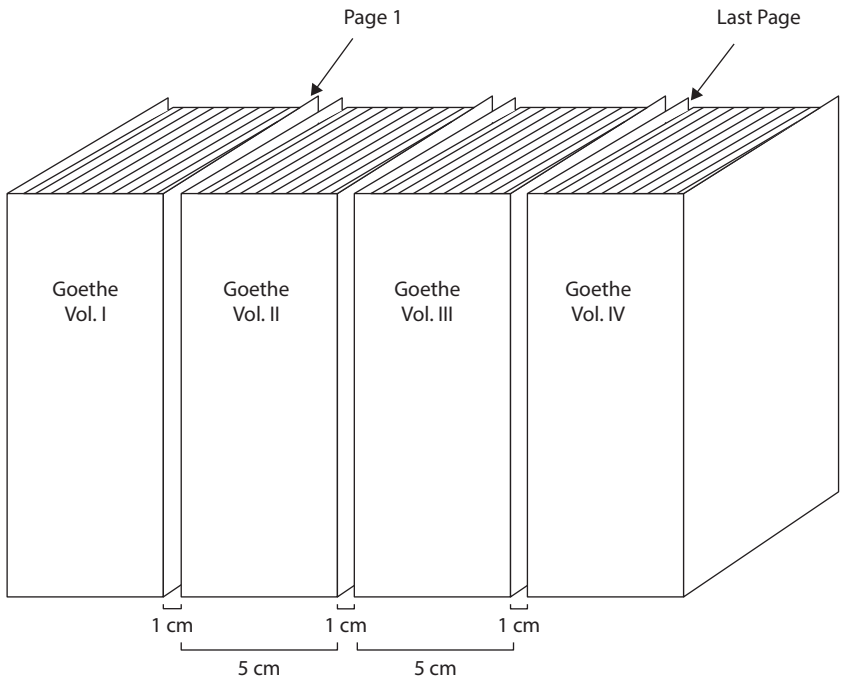


Figure 4.6. Bookworm Challenge



Answer: 13 cm

Figure 4.7. Bookworm Answer

Four Steps to Managing Arguments



Figure 4.8. Four Activities



Figure 4.9. Confirm Purpose



Figure 4.10. Document Positions



Figure 4.11. Appeal to Objectives

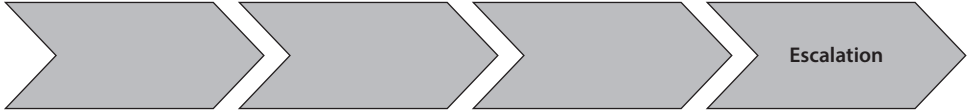


Figure 4.12. Escalate

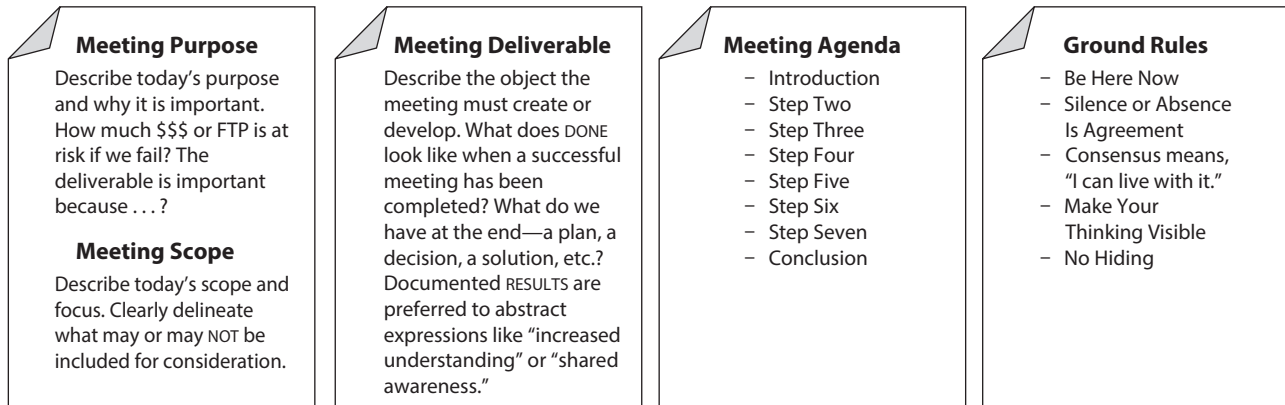


Figure 5.1. Large-Format Paper or Screen—Always Make This Content Visually Accessible

My name is _____ and my purpose is to serve you. Our goal is to complete an *Approach* that will accelerate Product/Project _____ (or department or organization) with results that each of you can support.

If this meeting fails, we're jeopardizing the entire project (or, department or organization) that is worth an estimated \$_____ and _____ FTP (one-time value or per year).

My role is to remain impartial about the content and your perspectives, but I am passionate about the session's importance. Leave your egos in the hallway because in this room, we will treat one another as equals.

Our time is short so let's begin.

Figure 5.2. Launching Script

Please mark the rating for this meeting on a scale of 10 (best) to 1



Topic

10

9

8

7

6

5

4

3

2

1

Meeting value

Participant contributions

Facilitator performance

To improve our next meeting, I suggest we:

Figure 5.3. Scaled Assessment

WORKSHOP EVALUATION

Instructions: You have just completed an *MG RUSH* workshop. In order for us to continue improving, please take two minutes to answer seven questions fully and honestly.

1. To what extent did the workshop meet your expectations?

_____ Not at all _____ A little _____ Mostly

If not "mostly", why not? _____

2. How would you rate your overall experience?

_____ Poor _____ Fair _____ Good _____ Very Good _____ Excellent

3. How effectively did the session leader explain the method?

_____ Poor _____ Fair _____ Good _____ Very Good _____ Excellent

4. How effectively did the session leader control the group and keep you on track?

_____ Poor _____ Fair _____ Good _____ Very Good _____ Excellent

5. How would you rate the overall performance of the session leader?

_____ Poor _____ Fair _____ Good _____ Very Good _____ Excellent

6. What suggestions do you have for improving the performance of the session leader?

7. Other comments or suggestions? (also use reverse side): _____

Figure 5.4. Detailed Evaluation Form

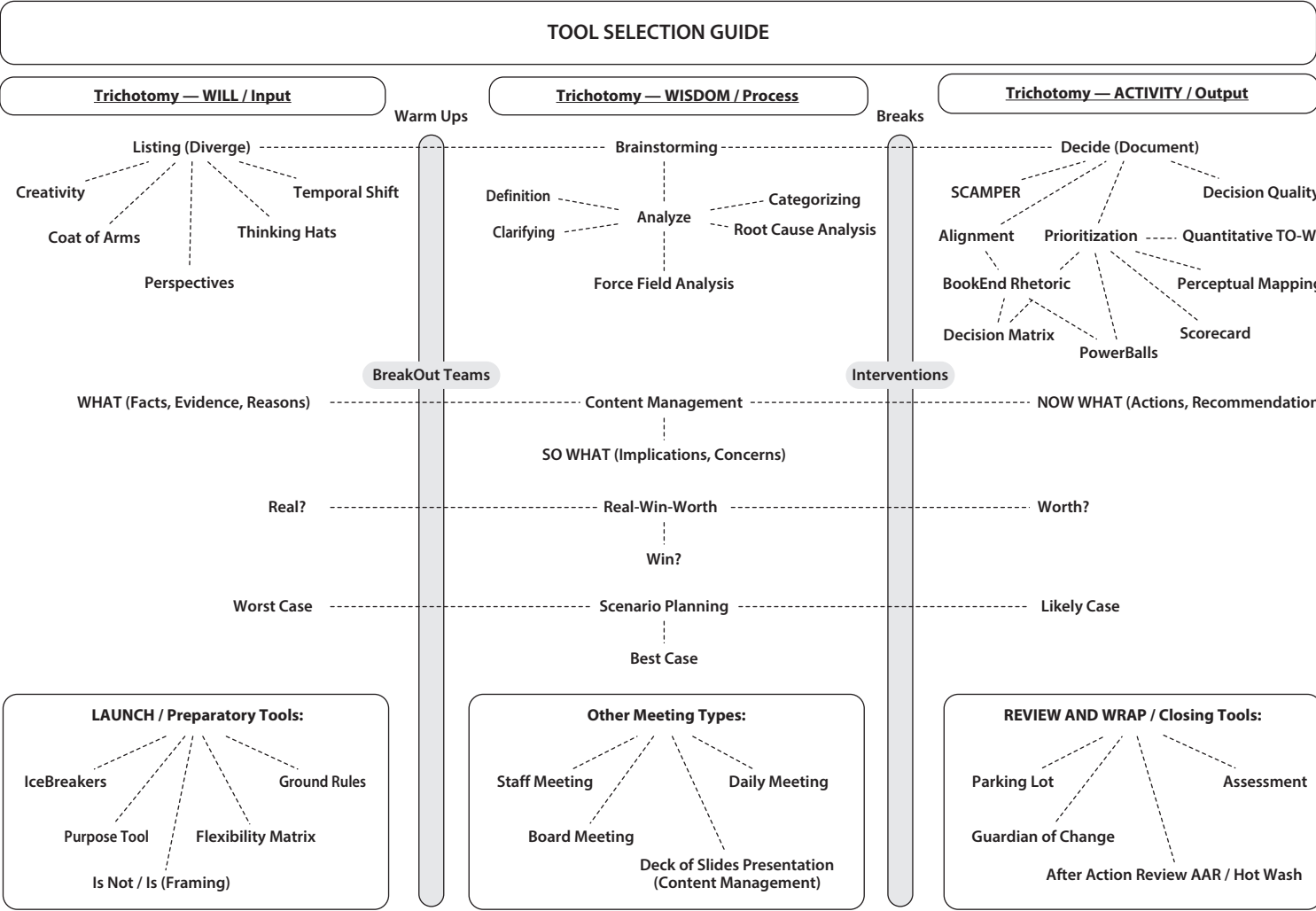


Figure 5.5. Tool Selection Guide

Table 6.1. Mountaineering Analogy

Agenda Step	Corresponding Analogy
Mission <i>Why do we show up?</i>	We choose to show up because we love mountaineering.
Values <i>Who are we, and how do we treat one another?</i>	We could be young and vibrant with no cash, or more mature and experienced with lots of money. What do we carry with us? Young people have ropes and value rappelling. More mature people have Sherpas who carry ladders, among other stuff.
Vision <i>Where are we going?</i>	Which peak are we going to ascend? Young people may choose the south peak because they don't have much time. Mature people may choose the north side with switchbacks that enable them to use their ladders and stop for comfortable breaks.
Key Measures <i>What are our measures or indicators of progress in reaching the Vision?</i>	<p>There are three types of criteria:</p> <p><i>SMART</i>—Be at 5,000 meters suspended in our sleeping bags before the storm blows in at 3 p.m. (objective).</p> <p><i>Fuzzy</i>—Get some nice photographs when we reach the summit (subjective or aspirational such as a goal).</p> <p><i>Binary</i>—Did we reach the summit or not (critical consideration)?</p>
Current Situation <i>What is our current situation of things we control and do not control?</i>	<p><i>TO-WS</i> analysis (showing the youthful mountaineers):</p> <p>EXTERNALLY CONTROLLED</p> <p>External <i>Threat</i>—avalanche</p> <p>External <i>Opportunity</i>—a “break” in the weather</p> <p>INTERNALLY CONTROLLED</p> <p>Internal <i>Weakness</i>—few supplies</p> <p>Internal <i>Strength</i>—stamina and flexibility</p>
Actions—What to Do <i>Given our Current Situation, what do we agree to do to reach our Key Measures placed as milestones to ensure we reach our Vision?</i>	Young people—They are going to rappel up the south side of the face of the mountain to quickly reach the summit so that they can return to base camp before they run out of supplies.
Alignment <i>Are those the right Actions and enough Actions to ensure we reach or exceed our Key Measures?</i>	Do they have enough rope? If the young people are rappelling 100 meters but only have 50 meters of rope, let's find out before they take off so we can adjust either the path or the amount of rope.

Table 6.1. continued

Agenda Step	Corresponding Analogy
Assignments <i>Who is doing What?</i>	Who is carrying the rope?
Communications Plan <i>What do we tell the world about what we completed here?</i>	Phone home before they make their ascent in the morning when the weather is predicted to be calm.

Table 6.2. Pre-session Survey for Strategic Planning

Among employees, what is the balance between anxiety and hope?

Mostly anxietyMostly hope

How does senior management’s point of view about the future compare to that of competitors and other industry experts?

Conventional and reactiveDistinctive and far-sighted

To what extent are we engineering the present or designing the future?

Mostly an engineerMostly an architect or a designer

What amount of our efforts focus on catching up versus setting up our own future vision?

Mostly a rule-takerMostly a rule-maker

What amount of our efforts focus on catching up with competitors versus building new industry advantages?

Mostly catch-upMostly new stuff

Which issues absorb senior management’s attention?

Re-engineering core processesRegenerating core strategies

Note: If your marks lean to the left or in the middle, your organization may be spending too much time preserving the past and not enough time and energy strategizing a new future.



Figure 6.1. Nuclear Disarmament Symbol

Table 6.3. Trichotomy of Will, Wisdom, and Activity

Trichotomy	Will	Wisdom	Activity
Brainstorming	List	Analyze	Decide
Transformation	Thought	Word	Deed
Reflectionist	WHAT	SO WHAT	NOW WHAT

		Situational Threats (–)							Situation Opportunities (+)								

		Situational Threats (-)							Situation Opportunities (+)						
		Competition	Loyalty	Macroeconomic	Price	Suppliers	Trends	Threats Subtotals	Acquisition	Channels	Development	Licensing	Sourcing	Speed	Opportunities Subtotals
Situational Strengths (+)	Ethics					2		2						0	2
	Flexibility					2		2	1	4				5	7
	Infrastructure			1				1			1	3		4	5
	Reputation	1	5					6						0	6
	Resourcefulness	4					1	5		1	2		2	5	10
	Responsiveness		4				5	9		1			2	5	8
	Strengths Subtotals	5	9	1	0	4	6	25	1	6	3	3	4	5	22
Situation Weaknesses (-)	Accountability				1			1			2			2	3
	Communications							0			2			4	6
	Costs	4		6	3	5		18	4				5	9	27
	Operations			1	2			3						0	3
	Product			1	3		3	7	4			3		7	14
	Targeting							0		3	2	3		8	8
	Weaknesses Subtotals	4	0	8	9	5	3	29	8	3	6	6	5	4	32
Totals		9	9	9	9	9	9	54	9	9	9	9	9	54	108

Figure 6.3. Illustrative One-Person TO-WS Worksheet










		Situational Threats (-)							Situation Opportunities (+)							
Situational Strengths (+)	Responsiveness	11	20	7	3	5	20	66	0	11	6	3	10	27	57	123
	Resourcefulness	20	5	0	5	12	13	55	0	13	11	11	12	7	54	109
	Flexibility	9	3	13	2	11	13	51	11	20	8	1	2	10	52	103
	Reputation	15	23	3	0	8	2	51	0	2	5	13	6	1	27	78
	Infrastructure	0	1	11	1	0	1	14	8	7	10	0	2	4	31	45
	Ethics	0	19	0	0	12	1	32	0	0	0	2	5	0	7	39
Strengths Subtotals		55	71	34	11	48	50	269	19	53	40	30	37	49	228	497
Situation Weaknesses (-)	Operations	5	2	10	13	3	0	33	13	8	5	0	1	8	35	68
	Accountability	3	3	5	14	6	6	37	7	0	12	12	10	8	49	86
	Targeting	4	6	2	5	6	7	30	8	18	14	21	0	0	61	91
	Communications	2	3	5	1	4	13	28	10	7	10	4	9	27	67	95
	Product	8	4	11	26	9	18	76	20	13	9	20	16	3	81	157
	Costs	22	10	32	29	23	5	121	22	0	9	12	26	4	73	194
Weaknesses Subtotals		44	28	65	88	51	49	325	80	46	59	69	62	50	366	691
Totals		99	99	99	99	99	99	594	99	99	99	99	99	99	594	1188

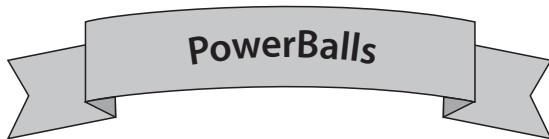
Figure 6.4. Illustrative 11-Person TO-WS Worksheet

		Situational Threats (-)							Situation Opportunities (+)							
		Competition	Loyalty	Macroeconomic	Price	Suppliers	Trends	Threats Subtotals	Acquisition	Channels	Development	Licensing	Sourcing	Speed	Opportunities Subtotals	Totals
Situational Strengths (+)	Responsiveness	11	20	7	3	5	20	66	0	11	6	3	10	27	57	123
	Resourcefulness	20	5	0	5	12	13	55	0	13	11	11	12	7	54	109
	Flexibility	9	3	13	2	11	13	51	11	20	8	1	2	10	52	103
	Reputation	15	23	3	0	8	2	51	0	2	5	13	6	1	27	78
	Infrastructure	0	1	11	1	0	1	14	8	7	10	0	2	4	31	45
	Ethics	0	19	0	0	12	1	32	0	0	0	2	5	0	7	39
Strengths Subtotals		55	71	34	11	48	50	269	19	53	40	30	37	49	228	497
Situation Weaknesses (-)	Operations	5	2	10	13	3	0	33	13	8	5	0	1	8	35	68
	Accountability	3	3	5	14	6	6	37	7	0	12	12	10	8	49	86
	Targeting	4	6	2	5	6	7	30	8	18	14	21	0	0	61	91
	Communications	2	3	5	1	4	13	28	10	7	10	4	9	27	67	95
	Product	8	4	11	26	9	18	76	20	13	9	20	16	3	81	157
	Costs	22	10	32	29	23	5	121	22	0	9	12	26	4	73	194
Weaknesses Subtotals		44	28	65	88	51	49	325	80	46	59	69	62	50	366	691
Totals		99	99	99	99	99	99	594	99	99	99	99	99	99	594	1188

Figure 6.5. Highlighted TO-WS Worksheet

Table 6.4. Illustrative Alignment

Criteria / Strategy	Profit	Revenue	Customer Satisfaction	...
<i>Retire debt</i>				~~~
<i>Office in China</i>				~~~
<i>RFID WMS</i>				~~~
...	~~~	~~~	~~~	~~~



High

"pay any price"



Low

"want it—but not
willing to pay extra"























Moderate

"willing to pay
a reasonable
amount"

Figure 6.6. PowerBalls

Table 6.5. Alignment Illustration

Goal/ Strategy	Confidence	Leadership	Relations	Knowledge	Expansion
<i>Mentoring, community involvement</i>					
<i>Community awareness, marketing</i>					
<i>Fundraising</i>					
<i>Facility expansion, infrastructure</i>					

<i>WHO/WHAT</i>	Finance	Distribution	Marketing	Human Resources	etc.
<i>Retire Debt</i>	R			I	
<i>Office in China</i>	S	S	I	R	
<i>RFID WMS</i>	S	R			
<i>etc.</i>					

In the example, the A in RASI is the Board of Directors. They will authorize all the strategies.

Figure 6.7. Basic Roles and Responsibilities Illustration

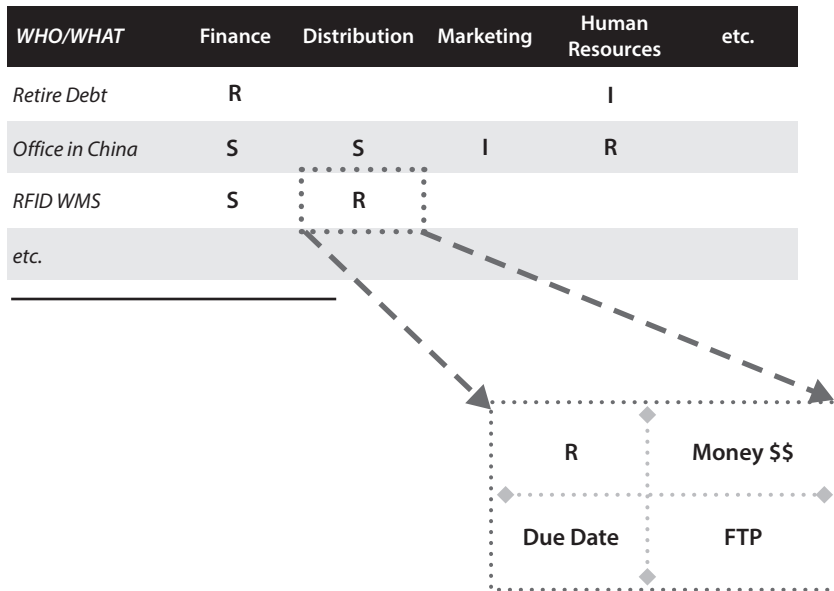


Figure 6.8. Enhanced Roles and Responsibilities Illustration

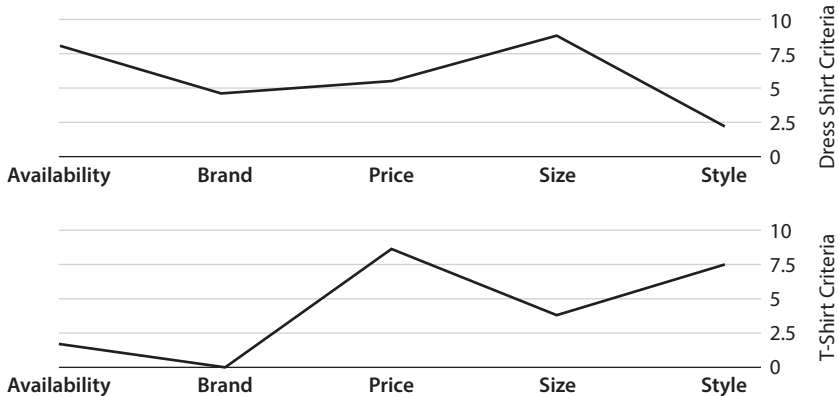


Figure 7.1. Large-Scale Sparklines of Shirt Profiles

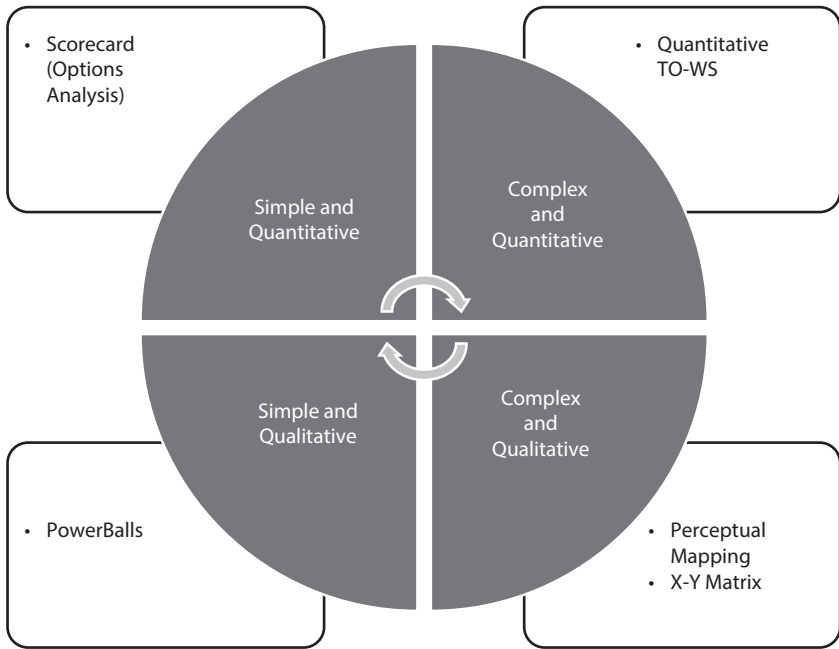











Figure 7.2. Prioritization Tools

Table 7.1. *Decision Matrix: Which Sports to Target?*

<i>Criteria/Sports Examples</i>	Sweat (Dehydration)	Participant Growth	Online Audience	etc.
<i>Curling</i>				
<i>Basketball</i>				
<i>Tennis</i>				
<i>etc.</i>				

Solution:																		
Criterion:																		
Performance:							Weight:				Score:							
1	2	3	4	5	6	7	8	9	10	Times		1	2	3	4	5		
Criterion:																		
Performance:							Weight:				Score:							
1	2	3	4	5	6	7	8	9	10	Times		1	2	3	4	5		
Criterion:																		
Performance:							Weight:				Score:							
1	2	3	4	5	6	7	8	9	10	Times		1	2	3	4	5		
Criterion:																		
Performance:							Weight:				Score:							
1	2	3	4	5	6	7	8	9	10	Times		1	2	3	4	5		
Criterion:																		
Performance:							Weight:				Score:							
1	2	3	4	5	6	7	8	9	10	Times		1	2	3	4	5		
TOTAL SCORE:																		
COMMENTS:																		

Figure 7.3. Blank Scoring Sheet



Figure 7.4. Payoff Matrix

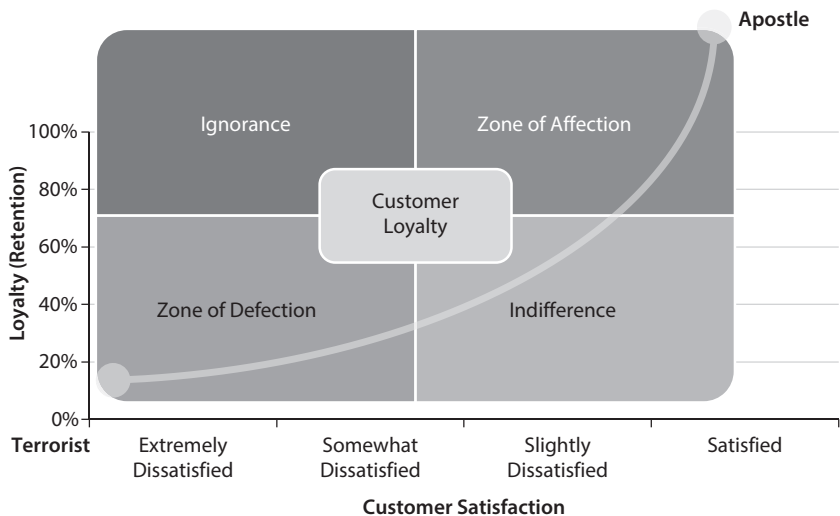


Figure 7.5. Customer Loyalty Matrix

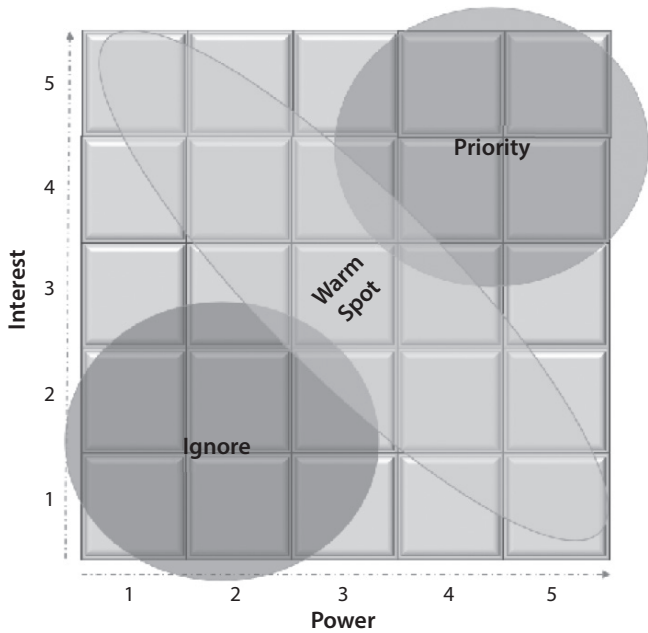


Figure 7.6. Stakeholder Power-Interest Matrix

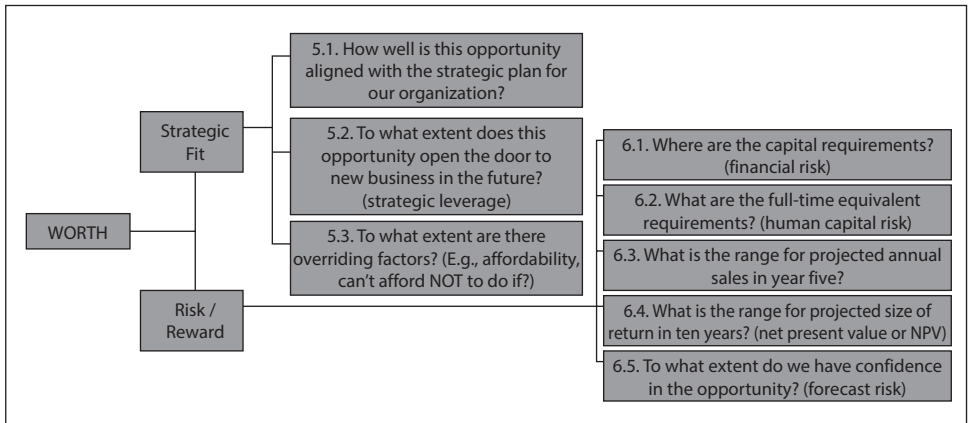
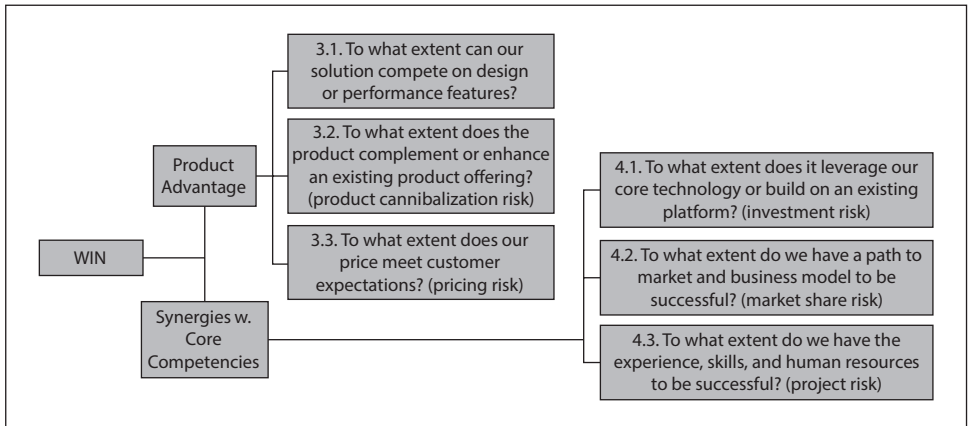
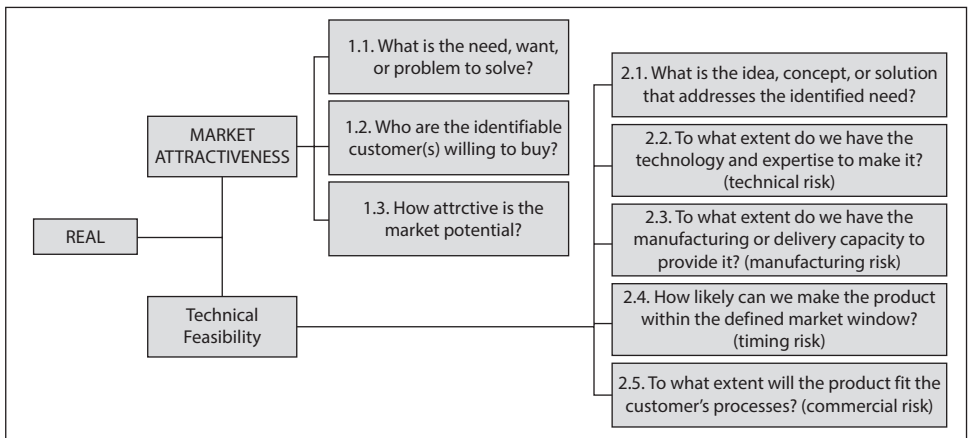


Figure 7.7. Real > Win > Worth Questions

Real > Win > Worth Potential Questions and Scoring Continuums							
			Criterion/Weight	0 (Uncertain?)	1	3	9
Real	Market Attractiveness	Is the Market Real?	1.1. What is the need, want, or problem to solve?	Unknown or no apparent need.	Not clear or not well defined need/ want/problem to solve or market development required.	Clearly defined and identifiable need/want/ problem to solve.	Need/want/problem is clear and is a validated by a customer or market.
			1.2. Who are the identifiable customer(s) willing to buy?	No interest or no known fit with a customer or a market segment.	Anecdotal customer(s) interest in buying the product/solution	Well-defined customer(s) interest in buying the product/solution	Well-defined interest and urgency in buying the product/solution
			1.3. How attractive is the market potential?	Market Potential <\$4MM	Market Potential <\$8MM	Market Potential <\$20MM	Market Potential >\$20MM
	Technical Feasibility	Is the Product Real?	2.1. What is the idea, concept, or solution that addresses the identified need?	Solution is not evident or no idea or concept currently exists that addresses the need.	Early ideas or concepts exist that address the need.	Several potential alternatives have been identified to solve the need.	At least one clear solution to the need has been identified.
			2.2. To what extent do we have the technology and expertise to make it? (technical risk)	New Technology or Invention is required.	Major development is required (reformulation, etc.).	Minor development is required (liner, thickness, color).	No development required.
			2.3. To what extent do we have the manufacturing or delivery capacity to provide it? (manufacturing risk)	New Manufacturing Process or Capability needed.	Major modification needed (equipment upgrades).	Minor modification needed (process settings, etc.).	Need can be filled with existing capability.
			2.4. How likely can we make the product within the defined market window? (timing risk)	Not possible to meet market window.	Low probability in meeting market window.	Moderate probability of meeting market window.	High probability of meeting market window.
			2.5. To what extent will the product fit the customer's processes? (commercial risk)	New customer manufacturing process(es) required.	Major manufacturing process modification(s) required.	Minor manufacturing process modification(s) required.	No changes required in customer manufacturing process(es).

Win	Product Advantage						
	Is Product Competitive?	3.1. To what extent can our solution compete on design or performance features?	Has many attributes inferior to competition with key customer requirements.	Is equal to but is sometimes inferior to competition with key customer requirements.	Is equal to and sometimes exceeds competition with key customer requirements.	Clearly exceeds competition with key customer requirements.	
		3.2. To what extent does the product complement or enhance an existing product offering? (product cannibalization risk)	No expected enhancement to product, customer, or market position.	Enhances product position at a specific customer only.	Enhances specific market and product position only.	Enhances specific market position and overall product portfolio.	
		3.3. To what extent does our price meet customer expectations? (pricing risk)	Price has not been validated.	Price has been validated by internal sources only (e.g., sales rep).	Price has been validated by at least one customer.	Price has been validated by customers representative of market segment.	
	Synergies w. Core Competencies	Is the Company Competitive?	4.1. To what extent does it leverage our core technology or build on an existing platform? (investment risk)	Leverages none of core technology platforms and technical strengths.	Leverages an insignificant level of core technology platforms and technical strengths.	Leverages some level of core technology platforms and technical strengths.	Leverages a significant level of core technology platforms and technical strengths.
			4.2. To what extent do we have a path to market and business model to be successful? (market share risk)	No path to market/new market/no business model	Elements missing from path to market/business model/new customer(s) within existing market	Existing path to market, existing business model, expanded offering to current customer(s)	Existing path to market, existing business model, replacement product for current customer(s)
4.3. To what extent do we have the experience, skills, and human resources to be successful? (project risk)			No existing FTE resources available for project.	Major FTE resource additions or skill set improvements are required.	Minor FTE resource additions or skill set improvements are required.	Current FTE resources and skill sets meet requirements.	

(continued)

Real > Win > Worth Potential Questions and Scoring Continuums							
			Criterion/Weight	0 (Uncertain?)	1	3	9
Worth	Strategic Fit	Is It Strategic?	5.1. How well is this opportunity aligned with the strategic plan for our organization?	Business opportunity does not align with existing strategic objectives.	Business opportunity is partially aligned with strategic objectives.	Business opportunity is closely aligned with strategic objectives.	Business opportunity is well aligned and is a “must do” to meet strategic objectives.
			5.2. To what extent does this opportunity open the door to new business in the future? (strategic leverage)	No other business opportunities expected outside of this specific offering.	Opportunity may be leveraged in more than one customer application.	Opportunity may be leveraged in several customer applications.	Significant opportunity to become a leveraged platform within organization.
			5.3. To what extent are there overriding factors? (e.g., affordability, can’t afford NOT to do it?)	No overriding factors.	Small overriding factors.	Strong overriding factors.	Strategic overriding factor.
	Risk/Reward	Is It Profitable?	6.1. What are the capital requirements? (financial risk)	Very Large (>\$370K)	Large (\$37K–\$370K)	Moderate (\$1.5K–37K)	Minor (<\$1.5K)
			6.2. What are the full-time equivalent requirements? (human capital risk) (financial risk)	Very Large (> \$390K per year)	Large (\$260K–\$390K per year)	Moderate (\$65K–260K per year)	Minor (<\$65K per year)
			6.3. What is the range for projected annual sales in year five?	<\$1MM	\$1MM–2MM	\$2MM–4MM	<\$4MM
			6.4. What is the projected range for rate of return on capital invested?	(First Full Year) GM < 40%	(First Full Year) GM = 40%–55%	(First Full Year) GM = 55%–70%	(First Full Year) GM >70%
			6.5. What is the range for projected size of return in ten years? (net present value or NPV)	(Ten Year) NPV < \$0	(Ten Year) NPV \$1K to \$800M	(Ten Year) NPV \$801K to \$3,900K	(Ten Year) NPV >\$3,900K
			6.6. To what extent do we have confidence in the opportunity? (forecast risk)	Largely not validated (Confidence <30%)	Validated (Confidence >30%)	Validated (Confidence >60%)	Validated (Confidence >90%)

Figure 7.8. Real > Win > Worth Detailed

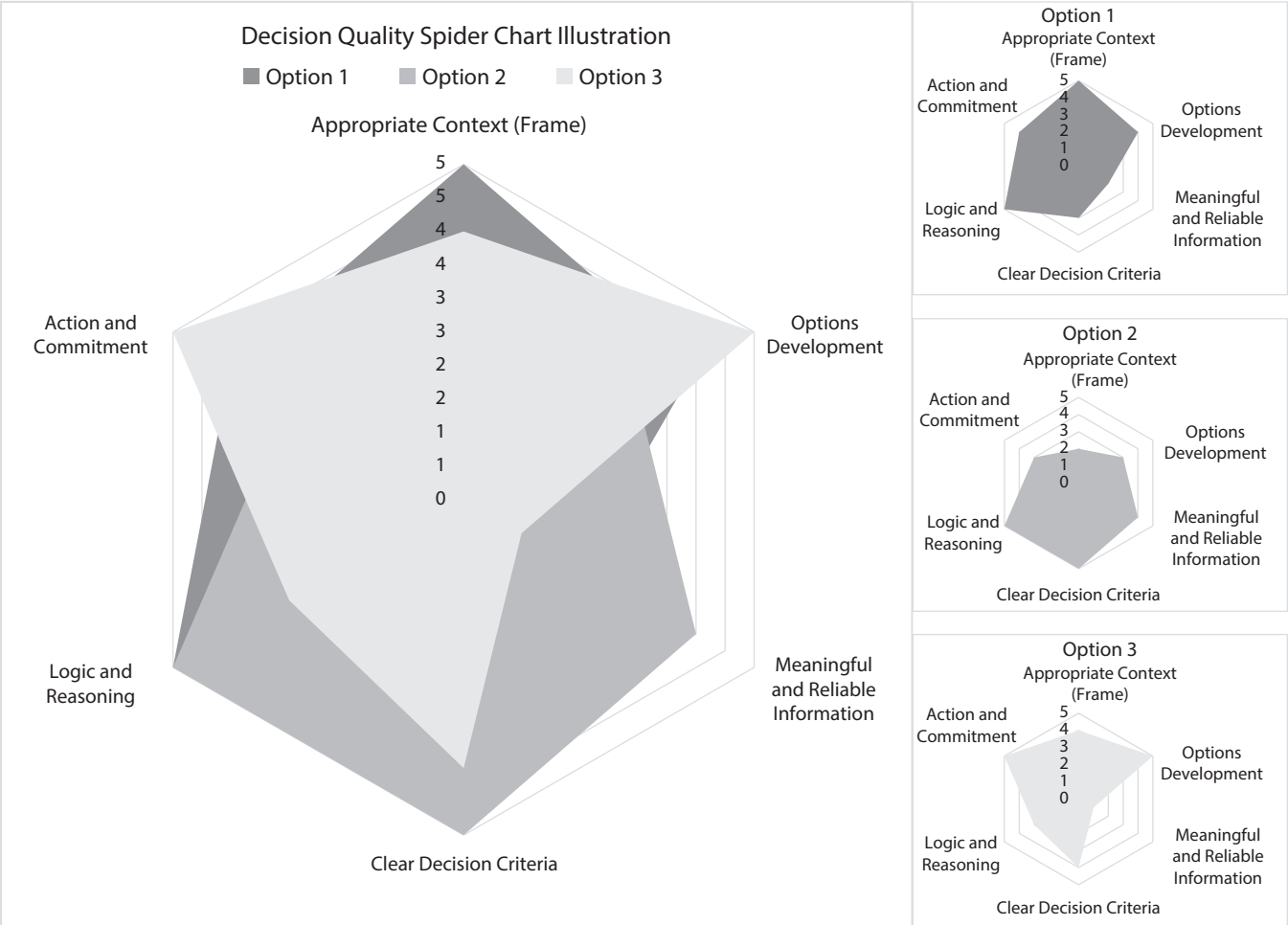


Figure 7.9. Six Vectors of Decision Quality Spider Chart



Figure 8.1. Creativity Tool Example

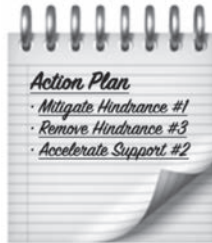
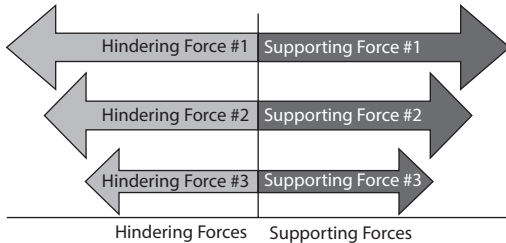


Figure 8.2. Force Field Analysis

SIX THINKING HATS + ONE

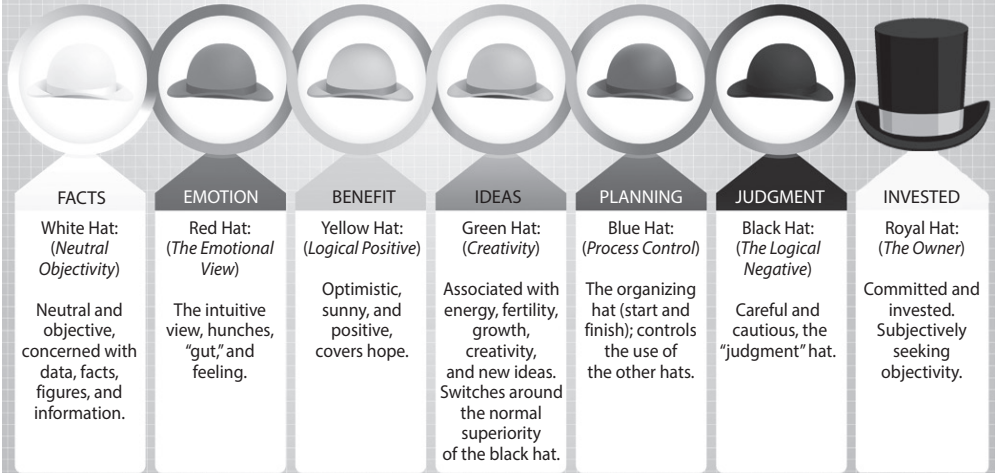


Figure 8.3. Six Thinking Hats + One

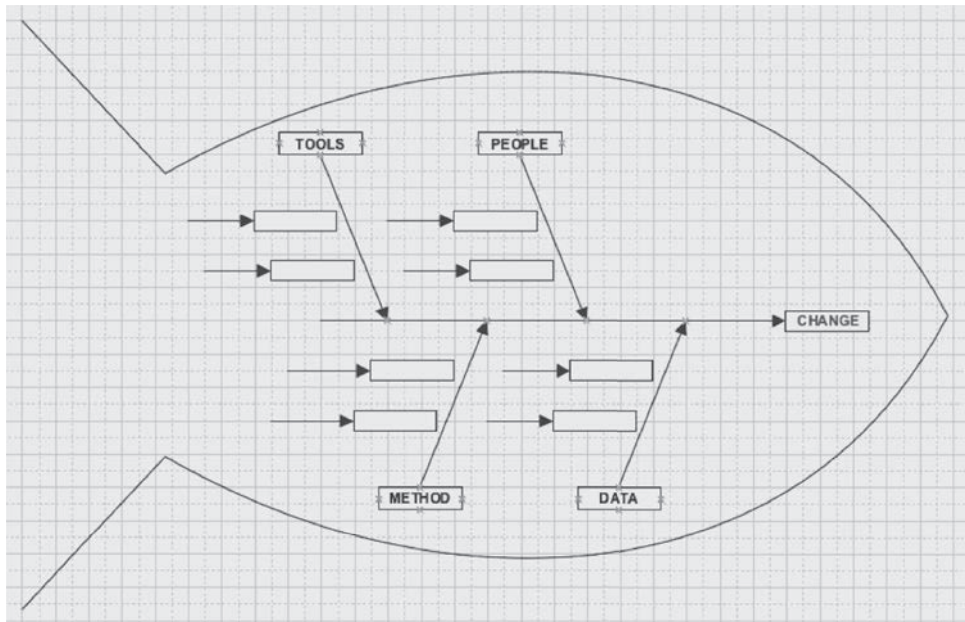


Figure 8.4. Fishbone Diagram

Table 8.1. Solution Stack (also known as Headache)

Timing / Persona	Before Burnout (preventative solutions)	During Burnout (mitigating solutions)	After Burnout (curative solutions)
<i>Management</i>	<ul style="list-style-type: none">• List of causes A, B, C, and so on	<ul style="list-style-type: none">• List of causes A, B, C, and so on	<ul style="list-style-type: none">• List of causes A, B, C, and so on
	<ul style="list-style-type: none">• Ideate preventions (1, 2, and so on)	<ul style="list-style-type: none">• Ideate mitigations (11, 12, and so on)	<ul style="list-style-type: none">• Ideate cures (21, 22, and so on)
<i>Cybersecurity employee</i>	<ul style="list-style-type: none">• List of causes A, B, C, and so on	<ul style="list-style-type: none">• List of causes A, B, C, and so on	<ul style="list-style-type: none">• List of causes A, B, C, and so on
	<ul style="list-style-type: none">• Ideate preventions (5, 6, and so on)	<ul style="list-style-type: none">• Ideate mitigations (15, 16, and so on)	<ul style="list-style-type: none">• Ideate cures (25, 26, and so on)
<i>Contractors</i>	<ul style="list-style-type: none">• List of causes A, B, C, and so on	<ul style="list-style-type: none">• List of causes A, B, C, and so on	<ul style="list-style-type: none">• List of causes A, B, C, and so on
	<ul style="list-style-type: none">• Ideate preventions (7, 8, and so on)	<ul style="list-style-type: none">• Ideate mitigations (17 18, and so on)	<ul style="list-style-type: none">• Ideate mitigations (27 28, and so on)

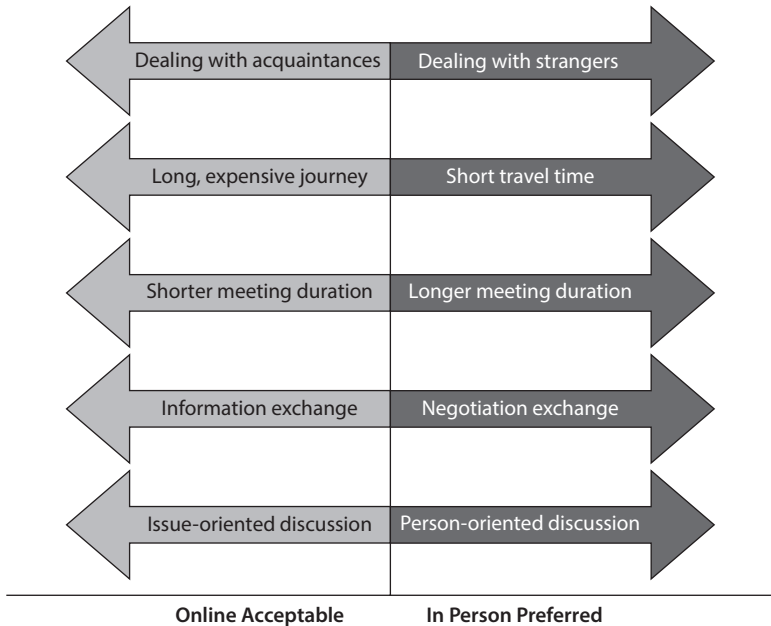


Figure 9.1. Online Meetings Criteria Preferential

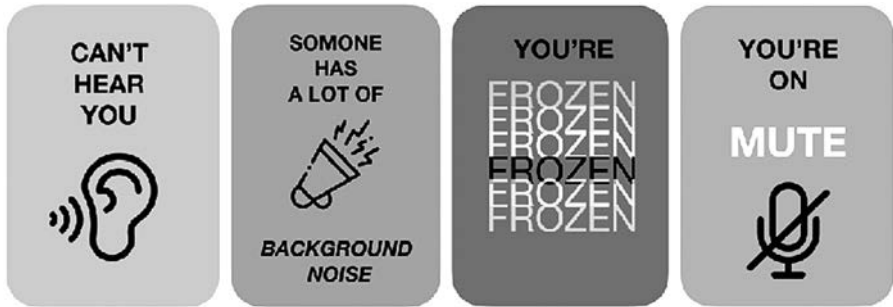


Figure 9.2. Sample Artifacts for Online Sessions

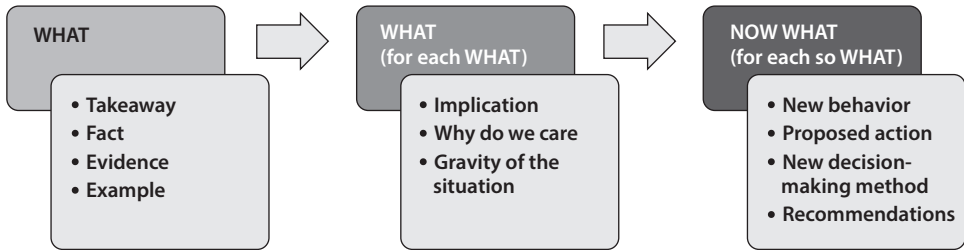


Figure 9.3. Content Management Tool

Table 9.1. Flexibility Matrix

Flexibility	Least	Moderate	Most
Resources (Cost)		✓	
Schedule (Time)	✓		
Scope (Quality)			✓

Table 9.2. “Is Not—Is” Procedure

Is Not (Out)	Is (In)	Uncertain
✓ ~~~~~	✓ ~~~~~	✓ ~~~~~
✓ ~~~~~	✓ ~~~~~	✓ ~~~~~
✓ ~~~~~	✓ ~~~~~	
✓ ~~~~~	✓ ~~~~~	
✓ ~~~~~	✓ ~~~~~	

Appendix



Support and Reinforcement

Use the following supplements to understand yourself better. The two most important days of your life are the day you were born and the day you figured out why. The materials in this appendix are intended to shed light on why facilitation and being facilitative are virtuous, to help you understand the rules of nature and natural order, and to illuminate servant leadership. The golden rule variations, including the “silver rule” version, and the *Tao Message of Invisibility*, are here for you to appreciate.

The *Meeting Design Steps* and *Agenda Framework* are intentionally duplicated here (from chapter 5) for your convenience. An alphabetical list of *Tools* will help you quickly locate the chapter where you can find any *Tool* when you need it for a particular application.

Following these sections, the glossary will save you some time. Use the bibliography to conduct deeper dives into topics that interest you personally.

—Traits, skills, and strengths identified by Leonardo da Vinci

- *Curiosita*—*an insatiable thirst for knowledge*
- *Dimostrazione*—*the ability to learn from experience*
- *Sensazione*—*the discipline of continuing to hone one’s senses*
- *Sfumato*—*the ability to cope with ambiguity*
- *Arte / scienza*—*holistic thinking*
- *Corporalita*—*what some people call sound mind and body*
- *Connessione*—*seeing deeply into the connection between things*



Being of service to others represents the most important effort in life. I hope you share that spirit with (as in “inspire”) others.

The Golden (Silver) Rule

This list compiles 13 religions’ versions of the golden rule.¹ The servant leader we envision understands natural laws, including cause and effect, and karma. While religion is a significant driver of past wars and violence, the religious founders would not necessarily be supportive of any actions taken without compassion for one another. Here is the proof:

Baha’ism

Lay not on any soul a load that you would not wish to be laid upon you, and desire not for anyone the things you would not desire for yourself.

—Bahá’u’lláh, *Gleanings*

Buddhism

Treat not others in ways that you yourself would find hurtful.

—The Buddha, *Udana-varga* 5.18

Christianity

In everything, do to others as you would have them do to you; for this is the law and the prophets.

—Jesus, *Matthew* 7:12

Confucianism (Silver Rule)

One word which sums up the basis of all good conduct: loving-kindness. Do not do to others what you do not want done to yourself.

—Confucius, *Analects* 15:23

Hinduism

This is the sum of duty: do not do to others what would cause pain if done to you.

—*Mahabharata* 5:1517

Islam

Not one of you truly believes until you wish for others what you wish for yourself.

—The Prophet Muhammad, *Hadith*

Jainism

One should treat all creatures in the world as one would like to be treated.

—Mahavira, *Sutrakritanga*

¹ Compiled by the Very Rev. Frederick A. Shade, *Communion* (Easter 2020), 16.



Judaism

What is hateful to you, do not do to your neighbour. This is the whole Torah; all the rest is commentary.

—Hillel, *Talmud, Shabbat 31a*

Sikhism

I am a stranger to no one; and no one is a stranger to me. Indeed, I am a friend to all.

—Guru Granth Sahib

Taoism

Regard your neighbour's gain as your own gain, and your neighbour's loss as your own loss.

—Lao Tzu, *T'ai Shang Kan Ying P'ien*

Unitarianism

We affirm and promote respect for the interdependent web of all existence of which we are a part.

—Unitarian principle

Zoroastrianism

Do not do unto others whatever is injurious to yourself.

—*Shayast-na-Shayast*, 13.29

The Tao of Facilitation

A servant leader can remain invisible. I would suggest that some of the fairest, kindest, and genuinely “good” people that you ever met, went unnoticed. You never knew what they were doing for the good of others, quietly in the background. The following verses are excerpted from Dr. Wayne Dyer's book *Change Your Thoughts—Change Your Life, Living the Wisdom of the Tao* (2007).

10th Verse

*Can you love your people
and govern your domain
without self-importance? . . .
. . . working, yet not taking credit;
leading without controlling or dominating?*

17th Verse

*With the greatest leader above them,
people barely know one exists . . .
. . . The great leader speaks little,
He never speaks carelessly.*



*He works without self-interest
and leaves no trace.
When all is finished, the people say,
“We did it ourselves.”*

27th Verse

*A knower of the truth
travels without leaving a trace,
speaks without causing harm,
gives without keeping an account . . .*

*. . . Be wise and help all being impartially,
abandoning none.*

Waste no opportunities.

This is called following the light.

What is a good man but a bad man’s teacher?

What is a bad man but a good man’s job? . . .

. . . This is the great secret.

Quick Reference: Nine Activities for Your Meeting Design Solutions

Use the following guideline for every significant meeting you lead.

1. **Codify the purpose and scope** of the meeting: What project or product are you supporting? Stipulate what it is worth in currency and FTP: Why is it important? How much is at risk if we fail?
2. **Articulate the deliverables:** What is the specific content that represents the output of the meeting and satisfies what DONE looks like? What is my analogy for explaining it? Who will use it after the meeting?
3. **Identify known and unknown information:** What is already known about the organization, business unit, department, program, product, or project? What information is needed to fill the gaps?
4. **Draft Basic Agenda Steps:** Compose a series of steps from experience or other proven approaches that would be used by experts to build the plan, make the decision, solve the problem, or develop the information and consensus necessary to complete the deliverable and get DONE.
5. **Review Basic Agenda** for logical flow: walk through the *Agenda Steps* with others to confirm that they will produce the desired results. Link your analogy to each of the *Agenda Steps*. Rehearse your explanation of the white space.



6. **Identify meeting participants:** Determine the optimal subject matter expertise you require, the meeting participants who can provide the information required, or both.
7. **Detail the procedures** to capture information required: gather and assemble specific questions that need to be addressed, even questions for which subject matter experts are seeking answers. Sequence the questions optimally. Build your *Annotated Agenda* including the appropriate *Tools* and activities to produce the information.
8. **Perform a walk-through** with business experts, executive sponsor, project team members, and anyone else who will listen to you (grandmothers are good for this and you might get a delicious, home-cooked meal).
9. **Refine:** Make changes identified in the walk-through, edit your final *Annotated Agenda*, firm up your artifacts, fill out your glossary, complete your slides, distribute your handouts, and rehearse.

Quick Reference: Meeting Design Basic Agenda Framework

Use this *Launch* and *Wrap* for every meeting—whether 50 minutes or multiple days.

Launch (Introduction) (chapter 5):

1. Introduce yourself: stress neutrality, meeting roles, and quantify impact.
2. State the meeting purpose and get agreement.
3. Confirm the meeting scope and get agreement.
4. Show the meeting deliverables and get agreement.
5. Cover the “administrivia” (for example, safety moment); have the attendees introduce themselves.
6. Walk through the meeting agenda (preferably using an analogy).
7. Explain the *Ground Rules* (chapter 4), emphasizing duty (fiduciary responsibility).

Middle Agenda Steps:

The meeting facilitator has an Annotated Agenda that details activities and procedures for each Agenda Step:

- *Agenda Step name*
- *Estimated time for each Agenda Step*



- *Agenda Step purpose (and analogy)*
- *Procedure for each Agenda Step*
- *Deliverable from each Agenda Step*
- *Graphical support required (such as legends, screens, definitions, and so on)*
- *Closure for each Agenda Step (and analogy)*

Wrap (Conclusion) (chapter 5):

1. Review the final output and deliverable: Restate or summarize what the group did.
2. Open items (*Parking Lot*): Assign responsibility and detail how the group can expect to be updated.
3. *Guardian of Change*: Determine what group participants agree to tell their superiors and other stakeholders about what happened or what was accomplished.
4. Continuous improvement: Use *Plus/Delta* or a more comprehensive meeting and facilitator assessment form.

Meeting Design Tools (Alphabetically)

Actions Tool, chapter 6

After-Action Review Tool, chapter 8

Alignment Tool, chapter 6

Assessment Tool, chapter 5

Board and Committee Meetings, chapter 9

Bookend Rhetoric Tool, chapter 7

Brainstorming Tool, chapter 6

Breakout Teams Tool, chapter 6

Breaks Tool, chapter 9

Categorizing Tool, chapter 6

Clarifying Tool, chapter 7

Coat of Arms Tool, chapter 6

Communications Plan Tool, chapter 6

Content Management Tool, chapter 9

Creativity Tool, chapter 8

Decision Matrix Tool, chapter 7

Decision Quality Tool, chapter 7

Definition Tool, chapter 6



Flexibility Matrix Tool, chapter 9
Force Field Analysis Tool, chapter 8
Icebreakers Tool, chapter 5
Innovation Warm-Ups Tool, chapter 8
Intervention Tools, chapter 9
Open Issues (Parking Lot) Tool, chapter 5
Perceptual Prioritizing Tool, chapter 7
Perspectives Tool, chapter 8
PowerBalls Tool, chapter 7
Purpose Tool, chapter 7
Real-Win-Worth Tool, chapter 7
Roles and Responsibilities Tool, chapter 6
Root Cause Analysis Tool, chapter 8
SCAMPER Tool, chapter 8
Scenarios and Ranges Tool, chapter 8
Scoping or Framing Tool, chapter 9
Scorecard Tool, chapter 7
Staff Meetings, chapter 9
Temporal Shift Tool, chapter 6
Thinking Hats Tool, chapter 8