

Chapter 4

Listen up: Seven ways to uncover talk-worthy ideas

“**T**he secret is to reach deep into your soul to talk about what you believe in, as it affects your audience,” I told a marketing director in explaining how to find a point of view.

“That may be true, but how do we do *that*? When we think about what we believe in, we default to things like increasing margins and revenue, producing quality products that provide value to our customers. That doesn’t sound interesting or new,” shot back the marketing director.

Okay. Let’s break it down. The following seven ways can help you uncover fresh ideas to talk about, ideas that can help people get to know organizations in a deeper way:

1. Tap into the CEO’s beliefs
2. Listen in new ways
3. Run a point-of-view workshop (but never on a Monday)
4. Hold a clarity council

5. Think more narrowly
6. Explore new metaphors
7. Go on a walkabout

Tap into the CEO's beliefs

CEOs spend most of their day talking with customers, analysts, investors, employees, and partners about ideas, trends, issues, and problems. Executives take CEO positions, which are all-encompassing, because of their passion for the company and what's possible. They live the business. They're driven by their beliefs.

"First and the most important is that you have to know what you believe if you want to be a leader," said Rudy Giuliani in a commencement speech to Middlebury College in May 2005. "You have to have strong beliefs. You have to know what you stand for. You can't lead other people unless you know what you stand for. You have to spend a great deal of your time trying to figure that out and trying to determine what's important to you, what goals you want to achieve."¹

Giuliani suggests that leaders have strong beliefs. So how do we extract those from our CEOs? One way is by annually asking the following twelve "What We Believe Questions." Set aside two hours and tape the conversation so that you capture the language, tone, and sentiment. As you talk about the questions with the CEO, keep asking him or her, "Why should customers (or employees or stockholders) care about this? What's the value *to them* of knowing this?" This focus on what the ideas mean to others will help make sure that the CEO's ideas aren't all about your company and products.

1. We believe passionately that . . .
2. People in our industry are wasting too much time talking about . . .
3. The thing that our customers should be worrying about is . . .
4. Conventional thinking says (fill in the blank about a relevant industry issue), but the real issue is . . .
5. Solving this one problem would change the game for our customers . . .
6. We never want to be associated with . . .
7. Our product category matters more/less today because . . .
8. People think the problem is . . . , but it's really . . .
9. What I'd really like to say to prospects is . . .
10. To make customers believers, they need to understand this one thing . . .
11. If I had a crystal ball, I'd predict these three changes for our industry over the next two years . . .
12. What gets me most excited about (our industry/our business) is . . .

Another approach, one used by Intuit CEO Steve Bennett to get ideas out of founder Scott Cook's brain, is to ask executives to boil down ideas into coherent repeatable phrases as Scott McNealy did at Sun with "sharing and participating," or a single word as May Kernan did at Women & Infants with "dignity."

One of Cook's phrases is "savoring the surprises." It's a perspective—a point of view—on the business. Cook uses the phrase throughout the company. It's a perspective that guides how Intuit gets inside customers' heads to look for new product ideas.²

These phrases aren't meant to be tag lines. They're simply

shorthand for beliefs that people understand, repeat, and develop successful programs around.

Listen in new ways

Listening, in many ways, is marketing.

In a conversational marketing world, listening becomes the communications star and talking takes on a lesser role. After all, in a meaningful conversation we aren't always talking, but we *are* always listening.

I don't mean listening as a prelude to figuring out how to market to people. And I don't mean listening as a finale, for measuring programs after the fact. I mean listening in an ongoing, active way.

Who other than marketing is responsible for uncovering insights and bringing them into the company? Who other than marketing to see things from the customer's point of view—and advocate for the customer with product management, customer service, and business strategy?

Listening carefully provides clues to what people are talking about, what they're concerned and frustrated about, what trends are dissipating or emerging, what language and feelings resonate with customers. An added benefit is that when people feel you're listening, they trust you more. And the more they trust you, the more they'll tell you how to give them what they want.

Listening is open-ended. The purpose is not necessarily to confirm our hypotheses or to get answers. It's about tuning in to what *other* people want to talk about, taking a real interest in what they have to say. It shakes our assumptions and shifts our perspective. It helps us understand where the other person is coming from. It helps us see his or her point of view.

“Through listening to others carefully, we are able to step imaginatively and empathetically into their shoes, and to experience the world from an entirely different point of view,” write Jaida N’Ha Sandra and Jon Spayde in *Salons: The Joy of Conversations*.³ The authors, former writers for *Utne Reader* magazine and longtime “salon keepers,” advocate for listening “in between the lines as someone speaks, hearing the feelings and the intentions as well as the words. It requires tremendous discipline.”

Listen for emotion

When Republicans in Congress began talking about eliminating the two-hundred-year-old senatorial filibuster, they felt fairly confident in their ability to succeed. The Democrats were deeply troubled, believing that without the filibuster, Republicans could quickly get their Supreme Court justice nominations approved.

The GOP is quite skilled at listening and understanding how to shape points of view that are relevant and emotionally appealing. So, when the Republicans began to mount a campaign to eliminate the filibuster, Democrats listened—really listened—to try to find a way to counter the Republicans.

Democratic researcher Geoff Garin didn’t so much lead focus groups as listen to them for clues and emotional triggers. He heard people talk about the “arrogance” of Republicans and their fears about “abuse of power.”

Hearing about these fears especially struck Garin. (Remember how important emotion is to meaning making?) “Abuse of power” provided a point of view for the Democrats’ discussions. It was powerful, simple, and easy to talk about. It was a clear, repeatable phrase: *abuse of power*. Easy for Democrats to remember and use in their own words and in their own style, which they did.

“During an appearance on ‘This Week with George Stephanopoulos,’ Senator Charles Schumer of New York needed all of thirty seconds to evoke the ‘abuse of power’ theme—twice,” according to *The New York Times Magazine*. “By the time Senator Reid took to the airwaves . . . (‘This abuse of power is not what our founders intended,’ he told the camera solemnly), the issue seemed pretty well defined in the public mind.”⁴

The Republicans backed down. The filibuster remains.

Why we don't listen

So why don't we listen more? Well, for one thing our business culture views listening as unproductive and not serious business. We're not “making” anything concrete, tangible, and measurable from the act of listening. Few of us get raises or better performance ratings for listening.

There's also the rush to solve the problem, which is an especially difficult challenge for us Type A's. As Daniel Yankelovich explains in *The Magic of Dialogue*, “In a typical discussion, almost as soon as the problem surfaces, someone is bound to say, ‘Well, what are we going to do about it?’ End of dialogue about problem; beginning of a rush of ideas for leaping into the fray and doing something . . . as long as it smacks of action.”⁵ Plus, most of us were never trained to listen. It's a new discipline.

Jiddu Krishnamurti, the Indian philosopher, once explained in his *Talks and Dialogues* why it's so difficult to listen:

I do not know if you have ever examined how you listen, it doesn't matter to what, whether to a bird, to the wind in the leaves, to the rushing waters, or how you listen in a dialogue with yourself, to your conversation in various relationships with your intimate friends, your wife or husband. If we try to listen we find it extraordinarily difficult, because

we are always projecting our opinions and ideas, our prejudices, our background, our inclinations, our impulses; when they dominate, we hardly listen at all to what is being said. In that state there is no value at all. One listens, and therefore learns, only in a state of attention, a state of silence, in which this whole background is in abeyance, is quiet; then, it seems to me, it is possible to communicate.⁶

Listening means putting our own points of view aside and intently focusing on what others are saying, why they're saying it, and how they're saying it with their words, metaphors, and stories.

Passive-listening tools

One way to listen passively to market whisperings and emerging trends is to monitor blogs for what is being talked about in the industry and about issues, products, and the company. As I write this book, there are fifty-eight million blogs in the Blogosphere, and approximately seventy-five thousand new ones are launched each day. Some have valuable, honest opinions; others are merely rants from the terminally disgruntled. But by analyzing the whole Blogosphere, marketers can see valuable patterns, thereby pinpointing emerging trends and highlighting customer dissatisfaction.

Software tools from companies like Cymfony, Biz 360, Umbria, and Nielsen/Buzz Metrics send an application called a spider over the Web to track postings about their clients, classifying the postings by topics, geography, organization, and person, and even identifying the sentiment of opinion by using language parsing software. In other words, these tools can classify whether the bloggers' sentiments on a particular topic are positive or negative.

A free tool to track aggregated blog opinions is Nielsen/BuzzMetrics's BlogPulse site. Type in a topic or company name, specify the time period you're tracking, and up comes a chart plotting the level of activity and allowing you to click on any point in the chart to read the blog postings for that point. BlogPulse also offers a free Trend Search, which allows you to map graphs that visually track aggregated blog conversations for discrete topics.

Figure 4-1 shows one that maps the conversations on cancer, heart disease, and strokes over a six-month period.

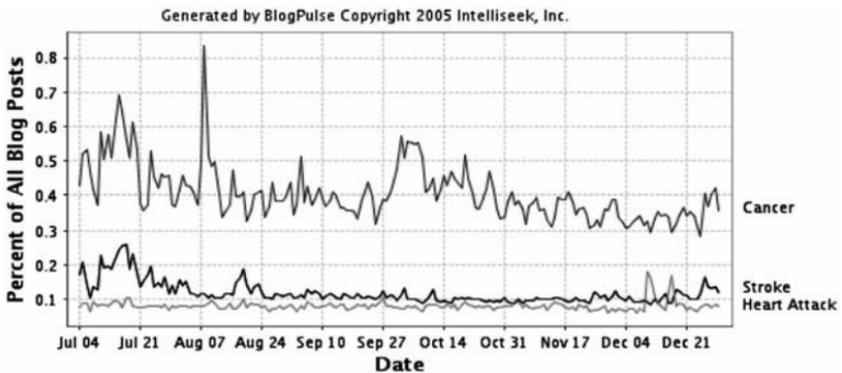


Figure 4-1. BlogPulse™, a service of Nielsen/BuzzMetrics.

One of the interesting things about the chart in Figure 4-1 is that it shows much more blog chatter about cancer and even strokes than heart attacks, even though heart disease is the leading cause of death. It shows there is an opportunity for hospitals with a cardiology specialty, or pharmaceutical companies with new cardio drugs, or even the American Heart Association to improve the market conversation so there is more talk about the disease that is more likely to kill people.

Another helpful tool is NetroCity's visual search service that goes beyond blogs and beyond simply classifying conversations by topics.

NetroCity pulls in every digital item—blogs, forums, and news—and visually maps patterns and relationships among topics. It paints graphical patterns synthesized from hundreds to tens of thousands of news items, helping us to see overarching patterns in an industry or around an issue.

The tool helps show what topics or companies—or what topics *and* companies—in an industry are being talked about the most, which are “connected” and being discussed in the same context and which are increasing in “volume” or dissipating.

NetroCity’s visual search maps provide patterns that let us see how others view our company, which is sometimes a different picture than how we see our company’s position. These maps help answers questions such as the following:

- * What are the most popular conversation topics in a particular industry, or around a particular topic?
- * What companies are most closely connected to these topics?
- * What issues is the company connected with, according to news and blog conversations?
- * Which of our competitors do people lump in with us when they talk about the industry?
- * How close to the center of the market discussion is the company—or how far?
- * Which topics are so peripheral that they don’t deserve any marketing attention?

The NetroCity map in Figure 4-2 shows the most popular and connected topics around retirement and financial planning for a three-month period. The larger the square and the closer to the center of the axis, the more conversation about the topic. Ideas talked about within the same contexts are closer together and linked by thicker lines.

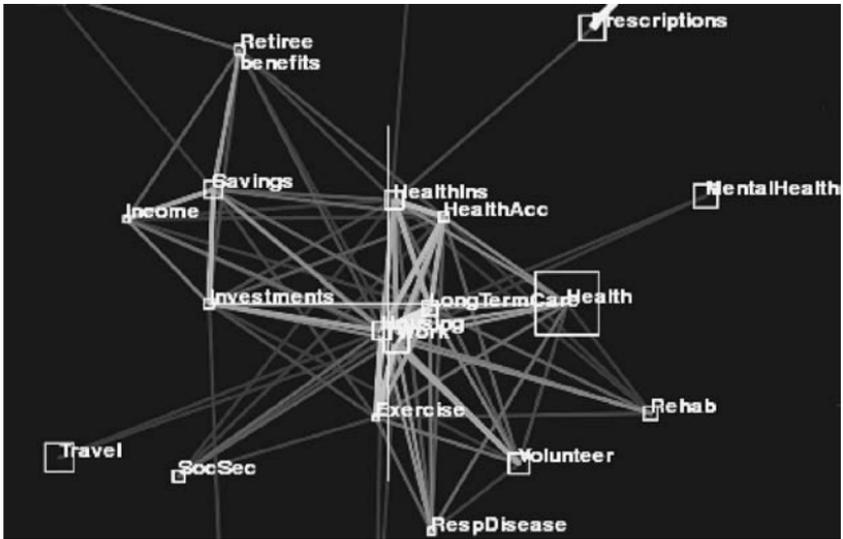


Figure 4-2. NetroCity Event Radar™.

If I were marketing health insurance, I'd look closely at the topics closely connected to health insurance—long-term care, rehab services, and health accounts—and create points of view on those topics. If I were a real estate developer targeting older people, I'd talk about nearby opportunities to continue working and to volunteer because “work” and “volunteering” are closely connected to housing on this map. I'd also talk about exercise, a third topic close to housing.

These NetroCity maps give marketers a clearer direction about where to focus their market conversations, as well as clues about how to connect their point of view with other contextually relevant topics.

How to listen more actively: Communities and listening tours

Although viewing aggregated data is useful for quickly getting the lay of the land in trends and consumer opinions, online com-

munities and forums also provide insights, as does getting out into the real world and doing listening tours.

Online communities are sites for people with similar interests to get together, to share ideas, and to talk about trends, products, and companies. Companies sponsor some of these communities. Other groups are people with common interests creating an online space to talk and share ideas.

All provide fascinating clues about what people are talking about—what they like, what they think is cool or stupid, what they do and don't want from companies, what trends they're especially tuned into.

A lot goes on at NikeTalk, an online community for people interested in talking about sneakers, but it isn't affiliated with Nike. Millions of site visitors talk about their opinions on different sneaker brands, types of sneakers, sports, and music; they even share their "sneaker art." For anyone in the footwear industry, conversations on these sites are quite interesting.

Another self-organizing community is TiVoCommunity.com. The 125,000 members of this community share ideas on how to get the most out of all TiVo's features, how to create complementary applications, how to be a better "TiVotee," and even how to convince friends to buy a TiVo.

Communispace, a Boston-based company, manages more than 250 private communities for companies like Hallmark, Starwood Hotels, Unilever, and Charles Schwab. Because these communities are private, members contribute much more than people do on public online forums, according to Communispace executives.

"Communities help companies shut up and really listen to their customers," Communispace CEO Diane Hessian told me. "The insights from these communities are extraordinary. Sometimes I can't believe just how honest and forthcoming

people are with one another and with the companies. If you really listen to customers, you'll not only find interesting things to talk about, you'll find ideas on how to grow your business."⁷

Hallmark community members provided real-life anecdotes that helped successfully revamp the greeting card company's line of Shoebox greeting cards. Charles Schwab CEO Chuck Schwab asked 400 high net worth members of Schwab's private online community for information about their investing strategies and market advice before he went out on a market tour. "He [Schwab] had the highest response to date from our community members," said Jonathan Craig, a Schwab vice president responsible for marketing services to Schwab's affluent independent investors. "Clients were literally writing essays to him about what they liked and what needed improvement."⁸

Alison Zelen, director of consumer and market insights for Unilever's deodorant category in North America, told people at a 2005 American Marketing Association conference that she started a community for young guys so that she and her team could really get inside the heads of their target customers. She explained:

Trust me, it's really hard not to sound like their parents, the typical company trying to sell them something, or like you're trying way too hard to be cool. Our community not only helps us learn about strategically relevant brand issues, it also helps us get into their heads and understand what makes them tick. Because the AXE guys talk to one another as well as us, we can observe them talking as if they were in the locker room. So we aren't influencing their word choice or the tone of their language. It's really great for us marketers, who are anywhere from two to fifteen years older than our target, to hear what they talk about.⁹

Unilever uses what it learns from the community for developing new products, messaging, and point-of-view creative concepts.

Get out on a listening tour

Listening tours are nothing more than stepping out into the market with an open mind and talking with customers, or employees, or, in the case of political candidates, voters. It's a way to hear what's on people's minds and to see patterns of what's important to people, and why.

Effective listening tours aren't usually delegated to junior people using formulaic questionnaires. It's not a "getting answers" tour; it's a "taking-the-pulse-listening-and-conversation" tour. The more you listen, the more you learn.

When Gary Kusin began as CEO at Kinko's, he spent his first six months visiting all 200 Kinko stores in the United States and meeting with more than 2,500 employees. "The most important thing I heard was that our customers have changed. They don't just need a quick turnaround copy job in the middle of the night. They want to know that they can partner with us for bigger jobs," he explained.¹⁰

A few years ago I went on a listening tour of SAP, the third largest software company in the world, along with Steve Mann, the company's vice president of competitive intelligence. Our objective was to talk with new customers to learn about their experience during the sales process. We wanted to better understand the following issues:

- * What information had been helpful?
- * What would they have liked to understand better?
- * What did they just not care much about?

We found that prospects wanted less information about SAP's products and technology and more insights about industry trends and what those trends might mean to *their* businesses.

"We don't want to hear all about your products; we can have people on our staff look that information up on the Web," customers told us. "We want to talk to SAP about their insights into our industry. SAP works with all the major players in our industry and has a better view than we do of the big picture trends that are emerging and how companies are addressing them. Talk to us about 'next practices,' not just 'best practices.'"¹¹

As a result of the listening tour, SAP began refocusing its marketing conversations to talk more about industry insights and future trends, and, as an added benefit, slashed the amount of sales collateral it produced because customers said they just didn't find sales collateral valuable.

During listening tours ask people about themselves, about what they like and don't like, about what they value and don't value. Listening tours engage people in conversations about both rational and emotional concerns that are relevant to your mutual interests. One of the secrets to a successful listening tour is asking good questions.

The World Café Community, which has established a process for bringing people together to talk about ideas and to collectively solve problems, believes that "good questions—ones that we care about and want to answer—call us outward to one another. They are an invitation to explore, to venture out, to risk, to listen, to abandon our positions. Good questions help us become both curious and uncertain and this is always the road that opens us to the surprise of new insight."¹²

Knowing that questions are critical to conversations, the World Café Community offers the following suggestions:¹³

- * Well-crafted questions attract energy and focus our attention on what really counts. Pose open-ended questions.
- * Good questions need not imply immediate action steps or problem solving. They should invite inquiry and discovery versus advocacy and advantage.
- * You'll know you have a good question when it continues to surface new ideas and possibilities.
- * Good questions sustain interest and energy.

After asking good questions, listen to what the answers tell about people's ideas, wants, needs, likes and dislikes, language, and sentiment.

Here's an example of some listening tour questions that the National Assembly of State Arts Association used in talking with Montana's political leaders to try to better understand the context and climate for the arts:

- * What do you value most about living in Montana?
- * How would you describe the character of your communities?
- * What's the biggest threat or concern you have for your town?
- * What would be your example of a successful citizen of your town?
- * What brought you to public service?
- * What led you to choose your political party?
- * When you're faced with more worthy causes than money, how do you set your priorities?
- * Do you remember an arts experience that made an impression on you?

Active listening: Making people feel "listened to"

Some of the best listeners are broadcast journalists, whose careers depend on being good listeners. I asked Robin Young, cohost of

the public radio program *Here & Now* and former *Today* show guest host, about what five things make for an interesting conversation. Her reply included the following tips:

1. Listening.
2. Really, listening.
3. After you've listened, asking questions relative to what you heard when you listened.
4. Then, listen to the answer.
5. And . . . follow up with another question, to make sure you heard correctly what the speaker was saying.
- 5a. Then . . . listen some more.

To build trust with people—trust that is necessary for them to tell us how to give them what they want—we have to make them feel *listened to*. This is important in face-to-face conversations, in online communities, and through marketing and sales programs. However, asking for opinions but never acknowledging those opinions is not real listening. It's just another form of conventional market research, designed to help the company but not build a relationship with the customer. Real listening gleans ideas and builds relationships.

Dr. Walter Carl, assistant professor of communications at Northeastern University, explained to me that there are three general categories of listening, a sort of Maslow's hierarchy of listening if you will. People tend to feel "listened to" when they reach the "endorsement" level:

1. *Recognition*—simply recognizing the other person's existence
2. *Acknowledgment*—acknowledging what another person feels or thinks or says (paraphrasing is often used to do this)

3. *Endorsement*—accepting another person’s thoughts or point of view as valid and legitimate

Here’s how this listening hierarchy works for talking with customers through channels like customer communities, managing a customer service organization, or in word-of-mouth marketing campaigns.

Providing an easy way for customers to provide ideas or even to complain is a way of showing recognition. Providing a relevant response that shows that the company hears and appreciates the idea or complaint demonstrates acknowledgment. (Note: you have to listen to the tone and emotion of the comment to provide a relevant response.)

The endorsement level requires more than most companies are willing to give. It involves having a conversation or dialogue with customers so that the marketers get the full context of where the customers are coming from and what’s interesting to them. Endorsement doesn’t imply that the company agrees with the customers’ points of view, just that it recognizes and respects the validity and legitimacy of their beliefs.

If a company can’t or chooses not to act on the customer’s suggestion or complaint, then it’s important to explain why the organization isn’t able to make changes or why the changes aren’t feasible. By taking time to have the conversation, the company shows that it understands and appreciates the validity of the customer’s comments but that the company also has a legitimate position. Few companies, according to Carl, ever reach the endorsement stage, which is too bad because it is only at this level that loyal relationships develop, many of which lead to customers becoming advocates for the company—even customers who had once complained.

Several academic studies have found that companies that respond to customer complaints or negative comments at the

endorsement level—accepting the customer’s response as valid and engaging in a respectful dialogue—can deter these customers from passing along negative word-of-mouth and even turn dissatisfied customers into loyal ones. According to a study published in *The Journal of Retailing*:

As long as the retailer ensures satisfaction, most complainants will not engage in negative word of mouth or exit. Rather, because they perceive the retailer as being fair and just, these complainants may actually become more loyal customers.¹⁴

The authors note that it’s important for companies to genuinely acknowledge the customer’s complaint, going so far as thanking the customer for raising the problem, and then reassuring the customer that the retailer is committed to improving.

Companies that fear losing control, or fear having customers post negative reviews about their products, have nothing to fear—if they are sincerely interested in those customers’ views and are willing to acknowledge, recognize, and endorse the customers’ opinions as valid and legitimate. Complaining is a conversation that doesn’t need to turn negative if each party respects the other’s point of view and communicates honestly about the issues. But woe to companies that don’t embrace this Maslow-like hierarchy of listening in our new conversational world. That’s when negative word-of-mouth can spread like wildfire.

What to listen for

There are three important things to listen for: intent, content, and language.

Intent helps us understand the emotion, feeling, and sentiment behind the words. Is the person excited and passionate about what he or she is saying? Is the person frustrated? Does the person find it ludicrous? Or, perhaps the person just feels that it's matter of fact, no big deal one way or the other.

The tone is a clue to what the person feels about what is being said. (As noted previously, social psychologists have found that people can accurately judge the attitudes and intentions of other people from a few dozen seconds observing tone of voice, body gesture, and language.) *How* things are said speaks volumes.

Content helps us understand the facts and information. One way to listen is to listen as if you'll have to later explain the information to someone else. Another way is paraphrasing what's being said to make sure you're hearing it correctly.

The third thing to listen for is lexicon and language. Studies have proven that people advocate for companies and for people with whom they identify. The more customers feel that they identify or relate to those in your company—or to your company's customers—the greater the likelihood that those customers will become loyal advocates.

Identity triggers advocacy significantly more than trust or customer satisfaction, according to a recent University of Queensland study.¹⁵ In fact, being satisfied with the product or service accounted for only 21 percent of the study participants becoming advocates, while identification accounted for 62 percent of the participants becoming advocates. "Consumer identification exists when a consumer feels a connection to a company and feels like he or she is part of a community of like-minded customers," said the authors of the study.

To help customers bond and identify, marketers can do the following:

- * Make it easy for customers to get to know like-minded customers by opening an online community for customers where they can talk with their peers.
- * Hold informal customer salons where customers have an opportunity to talk and get to know one another.
- * Express the company's point of view and use language that is relevant to customers, helping them relate to the company. For example, if you're marketing a product to college students and you want to say that something is great or outstanding, you'd connect better with them by saying that the product was "off the hinges." Now use that same expression with a baby boomer and he'll think the product was faulty or broken.

Lexicon matters, and it's constantly shifting and changing, so marketers need to listen closely, especially if we are not similar to our customers.

On how to listen

Michael Ende describes in his book *Momo* a little girl with an exceptional ability to listen:

Little Momo could listen in a way that nobody else could. That's nothing unusual, some might say, everybody can listen.

This is not true. There are only a very few people who can really listen. And the way in which Momo listened was absolutely unique.

Momo could listen so that inarticulate folk suddenly came out with bright ideas. It wasn't anything that she said or asked that brought such ideas out of the other person; no, it wasn't that. She simply sat there and listened

with full concentration, completely involved. While she gazed at them with her huge dark eyes, others felt unique ideas (which they had never guessed were there) suddenly surfacing from deep within.

She could listen so well that restless or undecided people suddenly realized exactly what they wanted. The timid unexpectedly felt free and bold. Those who felt unlucky or depressed exuded confidence and joy. And if somebody felt that something was missing from his life, which had become meaningless (that he was only one of the teeming masses; that he could not manage and would be discarded like a broken jar)—then he would go and tell little Momo all about it. While he spoke about it, it would become clear in some secret hidden way, that he was basically mistaken; that there was only one of him, that he was unique and because of that, he was important to the world.

How Momo could listen!¹⁶

Run a point-of-view workshop (but never on Monday)

Another way to find interesting ideas to talk about is to bring together people in the company to brainstorm ideas in a point-of-view workshop. Workshops can generate many potential conversational themes or they can bomb, torturing everyone involved and scaring people away from the notion that all companies have ideas worth talking about. Here's how to run a fun, productive workshop.

First, never hold a workshop on a Monday, maybe not even on a Tuesday. From many years of experience, I've found that it's

difficult to engage people at the beginning of the week. Monday is for catching up on e-mail, planning the rest of the week, and getting your head back in the game. Thursdays are the best days, with Wednesday coming in a close second. (By noon on Friday, people are itchy to get out of the work mode and don't fully concentrate.)

Set aside a full day and start early. Get a good recording device to capture the group discussions. You want to be able to capture the sentiment, tone, and emotion as well as the content of what's said. Having someone take notes won't capture the tone and emotion.

Invite up to twenty people to participate. Ideally invite the CEO, particularly if you haven't discussed the twelve "What We Believe" questions. Involving CEOs helps you get into interesting, compelling points of view quickly. CEOs have many well-grounded beliefs about the company and usually some strong views about the industry. Plus, the organization is more likely to rally behind ideas that the CEO is talking about.

Who to invite has less to do with individuals' titles or organizational responsibilities and more to do with their qualities. A cross section of people with different experiences and perspectives is ideal. Look for people who have the following traits:

- * Knowledgeable about the company, customers, and industry
- * Intellectually curious
- * Open-minded
- * Comfortable with ambiguity and talking about possibilities and concepts
- * Passionate but not zealots

- * Respectful of other people's views and opinions
- * Able to put aside their personal agendas for a day

Avoid including the naysayers and alpha fraidy cats—you know, those domineering people who are persuasive, smart, and articulate but are risk-averse. They naturally begin to pick an idea apart before allowing it time to breathe. Some of an organization's best process and execution mavens may in fact be the worst people to invite to a creative workshop!

Also, try to go to an interesting, relaxed place off-site instead of hunkering down in the usual conference room. A change of place helps everyone tune into the day and tune out the distractions of the office. I like places with windows and at least two walls where you can post sticky notes or clip chart pages.

Set up small café tables throughout the room. The small tables make the conversations among the groups more intimate and productive. On each table, place approximately fifteen sticky note pads, paper for doodling (some people think on paper by drawing versus writing), pens, and one flip chart at each table.

The facilitator also needs a whistle, a flip chart easel, and three pads of easel paper—preferably the kind that has the same adhesive built into it as the sticky notes (it will be easier to hang the flip chart paper on walls later in the day).

It's especially important to have a facilitator good at provoking discussion, questioning the group's assumptions, offering up contrarian perspectives about trends in your industry, guiding, and summarizing. Because these workshops are more like intellectual food fights than polite meetings, the facilitator needs to be more like a demanding, questioning university teacher than a schoolyard monitor.

Format of the workshop

I. Purpose (15 minutes)

Begin by explaining the purpose of the workshop—what you’re trying to accomplish and why it matters. Examples from successful workshops include:

- * “Despite a solid marketing strategy and new branding, people don’t understand that we’ve changed our business. We need to find new ways to help people quickly understand our business strategy and why it matters to them.”
- * “To be perceived as a player in our market, we need to be a bigger part of the market conversations. The more interesting our industry perspectives, the easier it will be for us to get meetings with more senior-level decision makers, get analyst mind share, and get quoted by the press. Today we need to examine our beliefs and perspectives about the industry in a new way.”
- * “We need to find ways to get our strategy off the page so that it’s much more interesting for our sales reps to discuss with customers.”
- * “We see the opportunities in being known as a business innovation consulting firm. What part of innovation do we want to own? What is our point of view?”
- * “Our marketing communications are in a rut. Today’s session is to brainstorm ideas that can bring our brand to life, helping us and everyone in the company to talk about the company in more interesting ways.”

II. Introductions (15 minutes)

Next, ask each person to introduce him- or herself and briefly explain why he or she wanted to contribute to this session.

(Note: the word *contribute* suggests action and responsibility to the group members; *participate* is too passive.)

III. Warm up the group by talking about market trends and context (1.5 hours)

This part of the workshop warms people up and gets them thinking about what's happening in the business and their organization. I suggest using four to five questions for this part of the workshop. The questions should start people thinking slowly and build up in energy and style. By the end of this warm-up, people should be feeling comfortable enough to venture away from “facts” and more freely share ideas and beliefs. Some examples include the following:

- * “What are our most common and significant communications obstacles? With customers, sales reps, financial analysts, employees, or media?”
- * “What market trends are most—and least—important to customers?”
- * “If a customer were talking to a peer about us, what would he or she say?”
- * “What are we not, never want to become, and never want to be associated with?”
- * “What’s the one thing we would like customers to understand but they don’t?”

IV. Small group 100-mile-per-hour¹⁷ “Twelve Beliefs” session (1.5–2 hours)

In this part of the workshop you break out into small groups of four people. Each group brainstorms answers to the twelve “What We Believe In” questions. (And remember to keep reminding participants to think about these questions from the

customers' point of view. Their tendency will be talk about the company's sales and marketing messages. Keep them "other" focused.)

"What We Believe In" Questions

1. We believe passionately that . . .
2. People in our industry are wasting too much time talking about . . .
3. The thing that our customers should be worrying about is . . .
4. Conventional thinking says (fill in the blank about a relevant industry issue), but the real issue is . . .
5. Solving this one problem would change the game . . .
6. We never want to be associated with . . .
7. Our product category matters more/less today because . . .
8. People think the problem is (blank), but it's really . . .
9. What I'd really like to say to prospects is . . .
10. To make customers believers, we need them to understand this one thing . . .
11. If I had a crystal ball, I'd predict these three changes for our industry over the next two years . . .
12. What gets me most excited about (our industry/our business) is . . .

Assign three questions to each group. Allow each group fifteen minutes to brainstorm ten ideas for their three questions, writing their shorthand answers on sticky notes and sticking them on the wall. At the end of fifteen minutes, the facilitator calls time or blows a whistle to end the idea session. Each group should have at least thirty ideas. The facilitator then asks the

groups to edit their ideas—narrowing them down to the three they like best for each question.

Repeat this format three more times for the second, third, and fourth groups of the twelve “What We Believe In” questions.

Then take a break.

V. Highlights: What We Believe (30 minutes to 1.5 hours, depending on size of group)

When you come back from the break, go through each question, asking a representative from each breakout group to share the group’s top three ideas to that question. The facilitator should write the ideas to each question on one flip chart page and then put the page up on the wall.

VI. Wrap Up: What’s the One Word or Phrase?

By this time, people will be getting tired. Here’s how to wrap up the session. Ask the group, “If you had to leave now and go have a conversation with a customer or *Fortune* writer about one idea, which idea would it be? Write down that word or a short phrase.”

Then, ask each person to share this one word or phrase idea and why he or she likes it.

Applaud the hard work of the group.

Wrap up by telling them that you’ll send a summary of the meeting within a week and will keep them in the loop on the point-of-view development process.

Hold a clearness committee

Are our perspectives engaging people or boring them? Is there something brewing in the market that we should be talking about?

It's hard to keep a fresh perspective on ideas that are worth talking about. After a while, we—and even our trusted agencies—become immune to stepping back and assessing which ideas are working and which aren't. That's why adapting the Quaker practice of Clearness Committees can help.

The purpose of the Clearness Committee is to help a congregation member assess a difficult or confusing situation. Prior to the meeting, the person seeking clarity writes a brief summary about the issue he or she is seeking clarity on and sends it to the five people invited to be members of the committee. At the meeting, the person seeking clarity briefly presents the problem or obstacle and then the committee members ask questions that help the person see the situation in a different light.

“The rules are so simple, they're radical,” writes Gregg Levoy in *Callings: Finding and Following an Authentic Life*. “The advisors ask questions only. No advice, no storytelling, no windy narratives.”¹⁸ In other words, committee members are there to help, to clarify, to listen without judgment or bias—and to ask honest, caring, challenging, and open questions.

Holding a similar type of meeting once or twice a year can also clarify marketing views. It costs little, except perhaps for paying expenses and a small honorarium to the committee members. The insights are almost always helpful. Questions can be broad, or more specific to a gnawing problem that you're having, such as the following examples:

- * “Sales reps say customers only want to talk price. How can we involve customers in discussions around value instead of price?”
- * “We believe people in our industry need to be talking more about (issues/trend). But we can't get anyone interested in the idea. Why?”

- * “How do we shift our marketing mind-set from talking all about our products to talking about broader industry issues?”
- * “We’re pigeonholed in this niche. How can we make our firm more relevant within the context of broader industry needs?”

Unlike an advisory council, the purpose of the marketing clarity committee is quite specific around an issue or obstacle that is impeding your success. It’s a small group—no more than five people and you. This isn’t a focus group where you invite your staff to sit in. To evoke advice, it must be between you and the committee members. (Although taping the session to help you replay the ideas is a good idea.)

Invite people with diverse perspectives, some who know your business and industry and others who are savvy business or communications professionals. All must be people who can be trusted to ask insightful questions, respect the confidential nature of the discussions, and are known to be superb communicators. Some types of people to consider include:

- * A savvy customer (or two) who wants to help the company
- * A top-performing sales rep
- * A recently retired executive from your company or a competitor
- * A respected editor of an industry publication
- * A journalism professor, who was once a practicing business writer
- * A respected communications or marketing executive, perhaps from another industry, or an experienced marketing/communications consultant with no ongoing relationship with the company

Prior to the meeting, write up a two-page brief on what you are trying to better understand or clarify, and distribute it to the committee members. Include why you want to figure out this problem, relevant background and context, and your hypothesis or hunches as to causes. (The discipline of writing this document will in itself help you see the situation in a new way.) Also, send guidelines about the meeting ahead of time so the committee members understand what's unique about the approach.

- * The meeting opens with you providing a brief summary of the question or concern.
- * Committee members' questions should be brief and to the point, focused on seeking answers to the question at hand. The focus is on the questions, not on lecturing or dictating advice.
- * All questions, even those that seem highly intuitive or headed toward left field, are okay. They may provide new insights around the question.

Meetings should last no longer than two hours. After that time, interest and ideas begin to wilt.

Guidelines for Cleanness Committees

- Do not spend too much time trying to clarify the history of the situation. Focus on the way forward.
- Keep your attention on the focus person. Sharing your own experiences, even in question form, will be a distraction.

- ❑ Keep your questions simple and nondirective.
- ❑ Do not be afraid to ask questions that seem far-fetched or even irrelevant. If they rise up in you, they probably need to be asked.
- ❑ Do not enter into the process feeling that you know the answer.
- ❑ Expect to be transformed.

Source: "A Quaker Toolbox: Guidelines for Clearness Committees," Friends General Conferences.

Think more narrowly

Another way to find a point of view is to talk about a narrower piece of a broad topic or trend. Too many companies tend to think that being “thought leaders” means talking about everything that’s going on in their industry. When we focus on a narrow slice, we often provide deeper, more insightful advice that helps customers think about and talk about troubling obstacles or the one thing that they really want.

Going narrow doesn’t imply that we don’t understand *all* the issues, but that we understand the issues and customer needs so well that we’re able to hone in on a particularly troubling aspect or an especially overlooked area that holds opportunities.

Since most people try to go wide and talk about all the issues or benefits, going narrow will set you apart.

For example:

Broad topic	Narrow point of view
Fighting childhood obesity	Rethinking neighborhood playgrounds
Retirement financial planning	Planning for early debt retirement
Business innovation	Fixing the front end of innovation by inviting customers into the process
Digital marketing	Search engine advertising
Compliance	Integrity

**Explore new metaphors—pigs,
flying barns, and fairy tales**

Metaphors help us make sense of ideas and *think* about concepts and points of view in ways that language alone cannot. Using *new* metaphors helps open up new ways of thinking and often provides new ways to express those views.

“Metaphor is typically viewed as characteristic of language alone, a matter of words rather than thought or action,” explains George Lakoff and Mark Johnson in *Metaphors We Live By*.¹⁹ “Most people think they can get along perfectly well without metaphor. We have found, on the contrary, that metaphor is pervasive in everyday life. . . . Our ordinary conceptual system is fundamentally metaphorical in nature.”

In other words, by equating one thing to another, we’re able to explore and see new ideas and meanings.

“Metaphors help people understand your vision and what makes a project different on so many levels,” award-winning architect Chuck Dietsche told me. “Using metaphors helps me to tap into the spiritual, emotional, and mystical and put it together for people in new ways. For example, I like using the metaphor

of fairy tales, with house as a place of safety and warmth, contrasting with the wild nature just outside the door.”

Using a fairy tale metaphor, here’s how Dietsche explains his house design called Rapunzel: “Standing sentinel beside its fraternal twin, the aptly named Rapunzel creates a childlike longing to climb to the top and let loose your imagination.”

Or, in explaining the difference between designing a primary residence and a second home, Dietsche says, “The first house is a dictionary. The second is a poem.” In other words, our primary homes are about accommodation: “Where do I park, where do I sleep?” While the second home idealizes our lives and helps us express that to the world.²⁰

Here are a few other examples of using metaphors to think in new ways and engage people in interesting discussions.

The executive of a financial services company expressed the company’s approach to talent by relating, “During an interview I ask potential employees whether they are equities or bonds, to help me understand who they really are and how they are likely to fit our needs. ‘Equity’ employees are more aggressive and drive new ideas and growth, while ‘bond’ employees are the Steady Eddies who make sure that the core business functions run day in and day out. Just like a financial portfolio, you need a mix of equities and bonds in your employees.”

Management consultant Alan Weiss uses the following metaphor to help clients see the need for focus: “What we need here is an arrow, not a flying barn.” This metaphor creates an immediate recognition of the need to streamline and gain aerodynamic efficiency, which is easier to deal with than pointing out that we’re trying to tackle too much, we have no focus, we need to set priorities, and yada-yada-yada.

Back in the 1990s, Ford Motor Company managers used a swimming pool visual metaphor to help describe how the com-

pany's culture was changing. Then CEO Jack Nasser explained to Suzy Wetlander, then editor of *Harvard Business Review*, that employees created two videos depicting the old and the new Ford. In the old, someone falls into a pool and starts drowning while the people standing around the pool watch but do nothing. "All the people on the side of the pool start to wring their hands . . . 'God, we've got a problem. . . . Maybe we should put a committee together.' And the guy in the pool, of course, drowns. In the video depicting the new Ford, the guy falls into the pool, and everyone jumps in to save him."²¹

To explain the problems with so much cost cutting in the airline industry, Gordon Bethune, former chief executive officer of Continental Airlines, often says, "If you are being rewarded for finding ways to make pizza cheaper, you eventually take the cheese off. You make it so cheap that people won't eat it."²²

Some metaphors have been so overused—think war and sports—that they're not helpful for thinking and engaging people in new ideas. But our culture is rich in metaphors that do help grab our imaginations.

In support of the *Harvard Business Review* article "No More Metaphors," as author Anne Miller wrote, "Selling anything today—ideas, services, products, or books—without metaphors is like driving a Ferrari without gas: You won't get very far."²³

Go on a walkabout

Sometimes the best way to think about the company's beliefs is to get out of the office and focus on the gnawing questions. When Patagonia hit a wall and had to rethink its priorities, founder Yvon Chouinard, did just that.

"I took a dozen of our top managers to Argentina, to the

windswept mountains of the real Patagonia, for a walkabout,” he explains in his book *Let My People Go Surfing*. “In the course of roaming around those wild lands, we asked ourselves why were in business and what kind of business we wanted Patagonia to be. We talked about the values we had in common, and the shared culture that had brought everyone to Patagonia, Inc., and not another company.”²⁴

By getting out of the office, walking and talking without distractions, your views are likely to become quite clear, quite quickly. (Patagonia decided to stay small and run a business that supported the employees’ beliefs in principles such as environmentalism and sustainability.)