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Measurement Tools for Content, Presentation Delivery, Group Commitment, & Post-Meeting Action Meeting ROI Fundamentals

January 2001- Honorable mention in Category I (Global Paragon Award) to HQ Global Workplaces Inc. in Dallas, Texas, for its 1999 Leadership Conference held in Montreal, Quebec, Canada. The event clearly demonstrated a proactive assessment of stakeholder needs and expectations and ensured a return on investment.

Executive Summary

"I want to give a hearty thank you to each of you for your work in Montreal. I believe that our entire company team will begin to understand what our HQ Global Workplaces brand means as they reflect on the last two days. It means first class, over the top, out of the ballpark planning and execution of a conference with the highest quality standards in every aspect, from the location to events to materials, speakers, etc. It meant over the top quality in each and every presentation made by this team and it meant over the top quality in involvement, caring and discussions between each of you and team members from one side of the world to the other during the course of the event.

Gary Kusin
Chief Executive Officer
HQ Global Workplaces

The Organization

HQ Global Workplaces is the world leader specializing in office outsourcing. The company provides flexible and complete officing solutions through a global network of 469 locations to full-time clients, those who need occasional access to office space and business services, and to home-based customers.

The Goals

1. Embrace the HQ Global Workplaces *vision and brand* and show how everyone contributes to bringing it to life for our clients.

2. Communicate that, "although our company is coming together from many places, cultures, and experiences, we must, together, *focus on being One World... One Company... One Vision.*"
3. Present the promise of the HQ Global Workplaces *office outsourcing tools* that will enable us to realize our vision.
4. Obtain the enthusiastic support and commitment of all stakeholders to adopt the HQ Global Workplaces *global operational standards*.
5. Demonstrate how HQ people will work together within the Network and *create more familiarity* among corporate and field directors/managers.
6. Showcase how HQ Global is *using its supply chain (meeting sponsors) to create the "Ultimate Workplace"* for clients.
7. *Show alliance and franchisee prospects that HQ is an exciting industry-leading company with tremendous global sales opportunity.*

The Solution

1. To embrace the HQ Global Workplaces *vision and brand* (and eventually, through the use of the post-meeting product, all team members) attendees should be able to answer the following questions:
 - What do our clients gain by workplace outsourcing at HQ Global Workplaces?
 - What is the difference between supplying the client "what they need" versus "what you have?"
 - Why are you so important to the process of acquiring and retaining our clients?
 - What is the brand experience we want to project at every HQ Global Workplaces center?
2. To gain commitment to the goal of *being "One World... One Company... One Vision"* – attendees should understand:
 - The strategic intent of the HQ Global Workplaces vision
 - The new HQ Global Workplaces global operations structure
 - The value and importance of the Global Operational Standards Manual
3. To be able to immediately work with clients using the four major *HQ Global Workplaces office outsourcing tools* they have for client retention and acquisition.
 - The Physical Facilities - convenient locations, Steelcase furnishings, private office space/conference/team rooms
 - Technology - high speed Internet access, state-of-the-art networking, videoconferencing, voice mail systems, modem/data ports, high-speed copiers, color printers, broadcast fax machines
 - Operational Standards - easy and convenient contracting; professional and experienced office staff; standard office practices and local city

knowledge

- Product Packaging and Pricing Standards - identify three products you believe will have the biggest impact on the occupancy rates and customer satisfaction of each of your clients
4. To embrace how we at HQ Global Workplaces should manage our *global operational standards* - attendees should:
 - Understand how standards define who we are as a company
 - List who it is that benefits from our "Standards of Success"
 - Iterate the goals behind Standards 2000
 5. To *create more familiarity* among corporate and field directors/managers, attendees will participate in teams or use the following "smart networking" tools and activities:
 - Tools - to seek out people who can enhance your own expertise
 - Social/Team Building Events - organized social interaction
 6. After the meeting, attendees will understand how HQ Global Workplaces is *using its supply chain (meeting sponsors) to create the "Ultimate Workplace"* for its global clients.
 - They will understand how each of the meeting sponsors (suppliers) fits into the HQ Global product mix.
 - They will be able to identify at least one service from each supplier that would fit into each of their accounts.
 7. At the conclusion of the meeting, HQ Global will have specific tangible recognition from *alliance and franchisee prospects that HQ is an exciting industry-leading company* and some confirmation for moving forward for each prospect.
 - Each HQ Global Strategic Leadership Team Member will be assigned a group of alliance and franchisee prospects to host.
 - Special meetings will be held as required to manage relationship opportunities as they occur.

The Results

During our closing reception we toasted not only a successful meeting but also bore witness to a strategy launch that several months later saw HQ grow to double its size and presence when it merged with its largest competitor. HQ Global Workplaces became the world's largest virtual and physical workplace solutions provider serving approximately 43,000 customers through 469 owned, managed, or franchised centers in 17 countries. The combined company will generate proforma revenues in excess of \$600 million in 2000.

- The power of the HQ Global Workplaces brand was a key aspect in the plans of the merger.
- The entire global team of 450 executives signed their commitment to the

vision and met in functional groups to discuss how to use the tools to create the branded experiences we want for our customers.

- Each attendee met with their direct reports following the meeting using the post meeting facilitation tool to ensure ALL team members actively participate in the process.
- Reports were made following these meetings with regional directors.
- Attendees met in breakout sessions and in functional groups with their regional directors to discuss client management practices, use of the new global operational standards manual, and to understand how the company would use technology to support center sales and service initiatives.
- Franchise owners met to assess how these standards were to be implemented and to decide the timetable for complete adoption.
- Company owned center managers met with management to understand how these standards are to be phased into service delivery and to discuss the most effective method for presenting this to their local team members.
- Corporate headquarters support team (human resources, training, sales etc.) met with center managers to discuss how they will support the field.
- Regional center managers met together to build their own local network to begin sharing best practices both at this meeting and to continue in their local areas.
- Attendees met with our technology vendor/meeting sponsors to understand the specific technology tool enhancements underway for every center and their role in delivering these services.
- We were able to build lasting relationships with franchise owners and owner prospects, which has resulted in their embracing our new global standards.
- Management met with franchise owners to identify those who may not meet the new global standards of operation to ensure compliance and safeguard the HQ Global Workplaces brand experience.

Situation Analysis/Business Challenge

The **HQ Global Workplaces Leadership Conference** had to achieve some very tough goals and objectives. The company was growing at a frenzied pace as more and more clients, e.g., Charles Schwab and 3COM, were choosing HQ Global Workplaces as their primary global office outsourcing provider. Simultaneously, HQ was adding new staff, integrating a growing list of international franchisees from four continents, adding new products and facilities, and completing a set of global operational standards for producing world-class quality throughout their network.

This was no ordinary meeting:

- 60 days to plan from the CEO's request to an opening reception in Montreal
- Franchise-owned and company-owned staff from six continents and 14 countries who had never met as one company under an HQ Global

Workplaces banner

- Senior leadership team members were essentially “unavailable” for planning given a rigorous global travel schedule and building the headquarters team.

Action Plan & Decision Process

ROI event business planning was critical to achieving our meeting objectives.

We had many different players coming from different organizations with their own cultures, expectations, and needs. It was critical to craft a message that spoke to every professional in a uniquely personal way. The message—“That ‘as one company with one powerful vision’ we can change the way people do business anywhere in the world.”

Therefore, we needed to make sure we understood each key stakeholder group as they came to this meeting in order to design and position our information delivery to maximize their understanding and commitment. In addition, we wanted not only to have our meeting audience embrace our vision and plans, but likewise all our “team members” working in hundreds of centers around the world who could not physically attend the meeting. Ultimately, we knew our real ROI would happen in the first 30-45 days following our meeting. We needed something to help our managers and directors communicate our vision to the field.

Approach: Putting It All Together

Some of the tools and techniques we used to accomplish this were as follows:

- We employed eight different measurement tools to “mass customize” content, organize our presentation delivery, build and focus emotional commitment, and accelerate post-meeting action.
- We made it possible for global attendees to register online from our meeting web site.
- We employed a pre-meeting survey - to which over 50% of our attendees responded - helping us to understand their needs, expectations and concerns before they got to the meeting.
- We leveraged meeting expenses and videotaped program content, creating a powerful post-meeting communication tool (with group exercises) for attendee-managers to present to their direct reports around the world - effectively bringing the content - and the emotional payoff - of the meeting to every HQ Global employee worldwide.

We further leveraged the stakeholder knowledge we gained putting the meeting together by creating a one-page Brand Profile to help us communicate the core principles of the HQ Global Workplaces brand to every team member worldwide..]

Best Practices: Measurement Tools

We selected a variety of specific tools to help achieve our objectives besides simple meeting evaluations.

To Customize and Develop Content

- *Stakeholder profiling* helped our senior management team tailor their remarks to key constituents and made it easier for us to track our on-site responsibilities and objectives. It also proved extremely useful for scripting the dramatic elements of the meeting production in order to touch every stakeholder group personally.
- *E-mail surveys* captured audience data that led to faster and better information exchange among attendees from different regions and countries and allowed us to customize key messages.
- *Speaker presentation templates* helped our Senior Leadership Team develop their presentations by staying focused on delivering three learning objectives and making sure they supported the others presenters before and after.

To “Gain Emotional Commitment” to the Vision

A staging technique known as a *commitment board* was used to showcase the Senior Leadership Team’s commitment to the vision, client relationships, and tools and people development of HQ Global Workplaces. Throughout the conference, the commitment board was placed in the registration area where team members could add their signatures and became a very emotional symbol to the meeting. At the closing reception, the commitment board was placed back on the stage as together with Gary Kusin we toasted our success.

To Record Onsite “Take Away Actions”

On-site handouts included “*actions to take*” that led attendees to immediately consider specific actions they would take following a specific presentation using a set of unique questions.

To Accelerate “Post-Conference Action” by Everyone

Edited from all of the various presentations gathered during the conference, a cohesive *post-conference video communication tool* brought the meeting goals to life with the ultimate aim of speeding action in the field around the outcomes of the meeting. The video contained “key moments” from the general session, images of other on- and off-site events, and interviews with HQ executives to reinforce the HQ vision, and to provide impetus for acting on their personal action plans. Combined with an HQ-developed *facilitator’s guide* (for the conference participant-manager to use), it was a powerful vision-building tool. Very important to the success of the tool was the emotional element built into its editing and design – viewers who were not at the meeting were able to “feel” the full range of emotions inherent in making a personal commitment to the company.

Three days after the meeting, a *post meeting e-mail* featuring key takeaways was sent to attendees to make sure their notes from the meeting had addressed critical thinking from each major presentation. This was received prior to the post-conference video.

To Assess Immediate Audience Reaction to the Conference

Separate evaluation forms were developed for the general session and breakouts.

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