

A blurred, high-angle photograph of a large crowd of people walking across a crosswalk. The image is out of focus, creating a sense of movement and a busy urban environment. The people are wearing various casual and business-casual attire. The crosswalk lines are visible as dark stripes on the light-colored pavement.

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BUILDING CLIENT RELATIONSHIPS ONLINE

THE POWER OF FACILITATED DIALOGUE
online

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Professional services firms facing challenges in the online world

- Most Professional Services (PS) firms are having difficulty responding to travel and meeting restriction where it comes to having effective online interaction with new business relations (prospects). The standard practice of having client events provided an excellent opportunity to get to meet new prospects and exchange business issues and solutions. That has gone because of restrictions.
- There is a solid focus on existing clients and most firms have started to make an effort of their content marketing strategy. It is realizing real interaction with new relations that PS firms find difficult. Most are organizing webinars and other forms of online presentations for clients and interested prospects. Yet, this is a one-way street as it is limited to 'sending' information. Interaction is very limited.
- Some underlying issues surface in these times, such as a growing need for commercial skills. This has become even more relevant for junior employees missing out on opportunities to join face-to-face meetings with their more senior colleagues and learn from them.

Realistic solutions are within reach

- To have interaction online, it has to be organized and planned. Spontaneity is missing when you're not in the same room or building together. But available tools and Apps provide good opportunities to do so.
- When organizing for meetings, design can make or break the level and effectiveness of the interaction going on. So is the case for client meetings. Just as in a general team meeting or a workshop, meeting design is different online than it is for face-to-face meetings. Using a combination of video calling, whiteboards and additional Apps, you can create a 'flow' in which participants contribute and interact to a collective process. We have substantial experience with creating and advise on online meeting structures and the selection and use of tools.
- You need to facilitate interaction much more, if you're online. Like structure and design, facilitating or leading an online session is very different from what we're used to in the physical world. As change professionals, we are experienced facilitators and have experimented, learned and tested to translate that knowledge to online processes and sessions with success.
- Building new relationships is a process that takes time. Just as in pre-Covid times, it takes several steps to actually bring someone in as a paying client. A platform or similar environment can serve as an online meeting space in which you can create continuity.

Tried & tested approach to innovative change

- We work from the basis of co-creation: Instead of thinking for your client and offering solutions to their issues, its much more effective to create that solution together. This is best done in a structured, facilitated process where different stakeholders (both internal and external) participate.
- Co-creation is most effective when it captures personal experiences by sharing stories and creating ideas that are grounded: based on what we know that works. Therefore, we apply Appreciative Inquiry as leading methodology. We combine this with the (related) concept of Design Thinking, adding Rapid prototyping & testing to the process.
- When co-creating, we're creating something new. For innovation purposes, an Agile-based approach to project management is considered the best fit. This translates into small project (sprints), adaptive planning and re-iteration of design and delivery and a focus on continuous learning and improvement.

Online co-creation in brief

Different stakeholders, both internal as external (clients, prospects) are invited to join a facilitated dialogue, following several progressive steps;

Dialogue is based on Appreciative Inquiry/Design Thinking to actually co-create practical and accepted solutions. This requires specific facilitation skills which will be transferred to Client.

The process will have a customized design, reflecting the Clients Marketing & Sales preferences. It can include synchronous (e.g. videocalls, creative sessions) and a-synchronous (e.g. survey or analysis) activity; Providing more flexibility, this will allow for more participation from different stakeholders;

Interaction can be with different group sizes. We recommend to start small and to grow and learn (applying Agile project management) by repeating for other client groups.

Client demands can be picked up by different internal specialists/teams who can collaborate to provide aligned or integrated solutions.

Draft possible end state (extracted from Miro)

In an online space (we use Miro as preferred whiteboard), we can interact and participate in the process steps, such as making a Business Model for the desired end state.



Draft first sprint/project (extracted from Miro)

The online whiteboard can also serve to communicate an overview of the process or separate steps ('sprints'). This more static use allows for 'asynchronous working', meaning that participants can make their contribution in their own time.



Client examples

- **EY Assurance:** working with clients, Partners and employees to define 'proactive behavior'. Process of sharing personal success stories (based on Appreciative Inquiry) removed an (self-initiated) image of high expectations (“*do I need to cross-sell?*”) and created a more comfortable atmosphere of putting new ways of working into practice;
- **Basic-fit:** defining a new service model for frontline (Club) employees by employees and middle management (in 4 countries). Next to directly changing behavior, additional supportive programs were identified (training and knowledge) and developed (again, in co-creation);
- **Wavin (EMEA):** defining a new way-of-working for the EMEA procurement team in an online process. Using MS Teams and Miro to design in co-creation, based on Appreciative Inquiry/Design Thinking.
- Self-initiated action learning project “**online facilitation of change**”: with some 30 professionals, using solely online communications and collaboration tools to explore possibilities and boundaries of online facilitation. Several methodologies and tools used.
- **Fontys:** re-igniting large change process with a full-day intervention. Use of Appreciative Inquiry and “appreciating the problem” helped to get everyone (Board, 30+ Directors) aligned and motivated to implement organizational changes.
- **VmS:** development of an online workshop (Zoom, Miro, Appreciative Inq.) in which teams can identify and define what they want to keep from the new online W-o-W and what they want to recover from working face-to-face.

HOW WE BRING YOU SUCCESS

THE BUILDING BLOCKS FOR SUCCESSFUL CLIENT ENGAGEMENTS



Building blocks for success

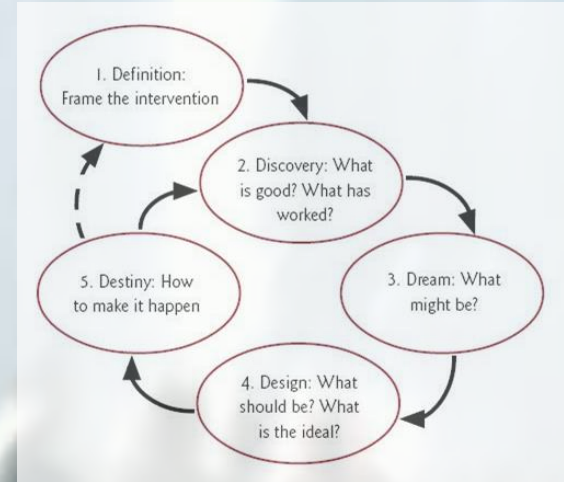
In projects and assignments for our clients, we see the combination of our expertise in 3 areas being critical to our success



- Our approach to change management: we think **co-creation** is the most powerful way to change ways-of-working and building new routines. As a preferred methodology, we apply **Appreciative Inquiry** and related models.
- We have the skills to **facilitate** change processes, both in face-to-face settings as well as **online**. We know which tools to use and how to apply them for each step.
- We work with our clients in an **Agile-based** project structure. This translates into moving forward in small 'sprints' and continuously test and adapt to learnings.

Appreciative Inquiry

- A strong methodology to structure the process of co-creation is Appreciative Inquiry. It uses **personal experiences**, being shared between participants through **Story telling** and which are investigated further to distill **success factors**. These successes and their underlying drivers are then used to envision the new way-of-working and what it takes to get there. Therefore, co-creation is not based on wishful thinking, but participants know it is realistic and possible to achieve. This is an important factor driving sustainability of the changes made.
- The “affirmative topic”, the subject of the inquiry (e.g. *can we be more proactive?*), gives direction to the dialogue without ‘predicting’ the exact outcome. Participants are free to tell their own story, which they feel most resonates with a feeling of fulfillment, being effective, making the change their own. The use of positive (i.e. success) stories defines the nature and ‘tone’ of the change. Over and over again, it has been found to remove barriers and to increase social connection between participants.
 - Often, participants who are longtime colleagues, return from interviewing each other, say they were surprised by the hidden secrets (talents or passion) of their colleague. Assumptions about the other person’s viewpoint or opinion are replaced by the surprise of really getting to know each other. So, the change not only occurs in co-creating a new way-of-working but also in revitalizing relations between participants.



We have been invited to help an organizational change process that stalled, get back into motion. One of the challenges was a high level of mistrust – between directors and the board and amongst the directors themselves. After the Appreciative interviews, sharing success stories, people came back relieved and cheerful. The mistrust, basically based on assumptions and past events, made room for connection and renewed relationships. Simply by giving (and facilitating) the opportunity to talk about what works and gives energy.



The power of dialogue

- The concept of story telling, from personal experience, is used in Appreciative Inquiry. Here, stories are shared about exceptional events describing an experience that was very successful, effective and/or rewarding or energizing.
- Story telling as a means of personal communications is the most powerful way of transmitting ideas and thoughts. The listener has similar activity in several parts of the brain and ‘relives’ the experience like the storyteller does. This is called ‘neural coupling’ (U. Hasson, Princeton).
- This powerful mechanism can even be expanded when sharing stories between different types of participants. When clients share their “success stories” with other (potential) clients, it triggers some desire to “want to have the same”. And when clients tell their lawyers and accountants what they really value – based on their own, personal experiences – this suddenly becomes a very concrete objective to realize. No expert or manager who can challenge that.
- *So, our role in managing change is largely facilitating and structuring the dialogue between people. Because it is people who change.*

In sessions that I've lead, I sometimes ask a participant whether (s)he believes what the person (s)he is interviewing, is saying. I'm always struck by the conviction of what's being said is true. If I then challenge with 'how do you know so sure?'. The reply is often: 'because (s)he was there, (s)he has experienced it firsthand. This, reflects the convincing power of telling and sharing stories.

Redesigning social connection online

- In the rapid turnaround in the way we need to do business, following lockdowns and meeting restrictions, we have accelerated our learning on how to operate online.
 - Working with a diverse team of change professionals and clients, expertise has been built on which tools and Apps to use and how to deploy them, operating online. Also, we've gained understanding and experience of how to structure and manage online communication, collaboration and relationship building.
- Building relationships through informal conversations has become more difficult using online communication. This is possible when we redesign the 'format' in which we do this: we need to plan and organize for the informal conversations to happen, without the possibility to go out for drinks or have dinner together.
- Trust is an important factor in doing business. It influences the way we interpret communications from (business) relations. When we trust someone, we are much more likely to accept what that person is saying.
- One of the ways we build trust is by social interaction. By sharing personal stories, having informal conversations, we get to know each other. This allows us to better assess credibility of business partners and team members.

In my work with an international remote team, there have some first examples of building new business relationship with new outside vendors, who have never been in face-to-face contact with the team yet. By focusing on social connection and allowing time to get to know each other without 'business agenda's', this has been proven successful.



Agile based project structure

- Most change is not predefined, so the ultimate outcome of the change process cannot be predicted in detail. Setting up project management according to Agile principles allows for effectively reducing uncertainty.
- By breaking up the project in multiple, small steps, they become more manageable and intermediate results can be tested and adjusted. Learning from each step, the route to a final solution becomes iterative by nature. This means that you can learn from previous process steps and also adapt to changes in the needs and preferences that emerge over time.
- Focus on a limited number of smaller deliverable brings more effectiveness and speed. This will bring benefits to your client services earlier and bring down total investments.

LET'S CONTINUE OUR CONVERSATION

As we exchange our experiences, thoughts and wishes for the future, we can discover and create ways in which we can work together and make your ambitions come true.

GET IN TOUCH

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