

Art of Convening

Achieve authentic engagement.



by Craig and Patricia Neal

CONVENING IS THE ART AND SCIENCE of gathering and holding people in a safe and generative space, for the sake of *authentic engagement* each time we come together, virtually or in person.

Once, I, Patricia Neal, was the designated *Convener* in a meeting of women executives, gathered to explore the notion of convening as a leadership competency. It was clear that these women were used to running their own show. Many grew into their leadership in results-dominated environments driving definable goals and outcomes where listening skills and vulnerability were not often appreciated. As the Convener, I'd done much preparation, but I was still nervous. Most of the women had never experienced *The Art of Convening*, and many were leaders with defined ways of doing things.

Following introductions, we gathered in a circle. I reminded myself that my intention was to bring authentic engagement to the gathering, and to set aside any motives that could interfere with that intention. Then I asked each woman to speak to an important question they are dealing with as a leader. As each spoke, their responses deepening with each voice, I was reminded of why I love to do this work.

A few common themes emerged: "How do I need to change to bring about the change I want to see?" "How do I create authentic connections with my people?" "I'm tired of doing things the same old way, but don't know what else there is."

Once everyone had spoken, most welcomed the chance to take a deeper dive into their challenges. The room had become electric with energy. And yet the *discomfort* of some was palpable.

Many competing agendas emerged, and by mid-afternoon, I'd lost my focus, getting off-track from the agenda. At this point, one leader left the

room without comment, obviously disturbed. A flash of anxiety swept over me. Would the group hold together? Would we complete the day?

I knew that I had to refocus on *my intention* to bring *authentic engagement* and suspend my judgment of others in the room and of myself. I was back on track to complete the day's agenda. The comfort level of the group increased, and "ahas" and nuggets of wisdom emerged. There seemed to be an understanding and appreciation for being together in *authentic conversation*. We closed the day as we had opened, hearing each voice. Although there were still voices of discord and disbelief, most of us appreciated the experience.

Comments ranged from: "This would never fly at my office." "What does this have to do with business?" *to:* "I have the courage to think differently and act on it." "Hearing all the voices is a game-changer for me." "My intention is to create *purposeful meetings* with mindfulness and presence."

Leadership is enhanced by the capacity to slow down for authentic engagement, to create authentic relationship, which is at the core of why convening with intention matters.

The Convening Wheel

To illustrate the art of convening, we created the *Convening Wheel*. We start at the center *At the Heart of the Matter*—Who I am in relationship with others.

We then progress through eight *Aspects* of convening—steps that guide our way of being and doing:

- **Clarifying intent:** Aligning our intent with the purpose of our engagement.
- **Inviting:** A sincere offering to engage that integrates purpose and intent.
- **Setting context:** Communicating the form, function, and purpose.
- **Creating the container:** Creating the physical and energetic field.
- **Hearing all voices:** Everybody speaks, is heard and is *present and accounted for*.
- **Essential conversation:** Meaningful exchange within a culture of trust.
- **Creation:** Something new emerges from engagements of shared purpose.
- **Commitment to action:** Agreement to be responsible and accountable.

The Wheel reveals *intuitive progression* of actively engaged relationship. *Meaningful connection and engagement* are key to sustainable, satisfying results. LE

Craig and Patricia Neal, with Cindy Wold, are co-authors of *The Art of Convening*. Visit heartlandcircle.com/home.htm.

ACTION: Convene to get at the heart of the matter.

Go from Now to Wow

Recreate your leadership story.



by Howard M. Guttman

THE STORIES YOU TELL yourself, about yourself, can make or break your future.

In a dark moment of the film, "Casablanca," Humphrey Bogart's character is drunk, alone in his bar, when Ilsa, his long-lost love (Ingrid Bergman), walks in the door.

"Can I tell you a story?" she asks.

"Has it got a 'wow' finish?" he slurs.

"I don't know the finish," she says.

"Well go on, tell it. Maybe one will come to you as you go along."

Like Ilsa, when we are faced with challenges in our lives and work, we tell ourselves and those around us stories to explain the situation. But, unlike Ilsa, we know—or *think* we know—the ending: "I don't work well in a team, what's the point of giving this project my best effort?" "My counterparts in Asia don't like me, why should I bother coordinating with them?"

These self-defeating narratives often define our lives, acting as insurmountable obstacles that prevent us from becoming true leaders. These stories may even sound logical. If you hate working in a team, why would you give your all to a team project? And if you think your colleagues in Asia don't like you, why would you go out of your way to work with them?

Most stories exist only in your mind. The reason you "don't work well in a team" might be because you're uncomfortable being challenged or can't manage conflict. And how do you know that your colleagues in Asia don't like you? Have you asked them?

The *going-in* stories that you tell yourself exercise a powerful, often-hidden pull on how you perceive reality, make decisions, and act. They serve as a protective buffer from the mental, emotional, or physical discomfort that you experience when faced with change, enabling you to remain in your comfort zone—safe and unchallenged.

When you change your inner narrative—your going-in story—from negative to positive, limitless possibilities open to you. As an executive coach, I've seen radical transformations occur with people who change their *going-in stories*

and witnessed their amazing successes.

Take *Martin*, a HR executive at a Fortune 100 company. He'd just been promoted to head of HR for the Asia-Pacific division when his COO asked me to coach him. Martin's *going-in* story was that he wasn't a true leader whom others sought out for guidance and direction. He thought of himself as a mere hiring-and-firing manager. But now, in every meeting and interaction, he would have to project leadership qualities: strength, confidence, decisiveness, and innovative thinking.

I told Martin that he already had years of leadership experience and already made hundreds of leadership decisions that had affected the lives and productivity of his colleagues.

We created a balance sheet to show the *costs versus benefits* of his *going-in* story. The *benefits* were appealing: By not thinking of himself as a *true leader*, he never had to spearhead innovative initiatives. As long as he did *adequate*—if never ground-breaking—work, his place in the company would be secure.

But what about the *costs*? Now that his managers expected fresh ideas, and people reporting to him looked for leadership, his managers would soon notice that Martin was playing it safe.

Martin realized that he needed to realign his thinking—fast. I call this the *ouch moment*: *you realize that the costs of your going-in story far outweigh the benefits, and you feel a sense of urgency to make a change for the better.*

Ironically, your *going-in* stories are rarely shared by your peers. I once worked with a female executive who had been with the company for three years but still felt she wasn't taken seriously. This *going-in* story kept her from offering suggestions or sharing opinions, even when she felt strongly.

I encouraged her to open up to her colleagues, telling them why she usually kept quiet in meetings. She learned that the rest of the group took her seriously, valued her perspective, and had never considered her *too inexperienced*.

Sharing your *going-in* story with others—in an objective, way—can reveal just how off base your perceptions are.

The stories you tell yourself about your life, wants, and needs can limit your potential, or open up new vistas of possibility. When you test these stories against reality, a new, more positive worldview comes into being. You can even give yourself a *wow* finish. LE

Howard M. Guttman is principal of Guttman Development Strategies and author of *Coach Yourself to Win* (McGraw-Hill). Visit www.coachyourselftowin.com.

ACTION: Recreate your leadership story.

Strike at the Root

Answer Drucker's five questions.



by Mark Faust

FOR A HALF CENTURY, Peter Drucker boiled down the basics of management to *Five Questions* that are the root of many *problems* and *opportunities* for improvement. How accurately can you and your team answer them?

1. What is our mission? Leaders facilitate the creation and refinement of the mission, but customers (external and internal) must influence its evolution. How do you elicit input from your team regarding the mission? Do you update your mission accordingly?

2. Who is our customer? You must have a prioritized list of your *Best Customers* and *Best Targets for Future Growth*. Do you have these lists, with action items assigned and scheduled? Do you prioritize prospects and customers in need of attention? Do you measure progress toward *customer development*?

3. What do customers value? This question can only be answered by your customer directly. How do you regularly solicit customer input and gather perceptions that matter most?

4. What are our results? This question, too, can only be answered by your customer. Do you regularly solicit customer input, gather perceptions, and measure results?

5. What is our plan? Most every team will claim to have a plan, but is your plan based on the proper input from the efforts in these five questions?

Knowing *people tend to support that which they help to create*, elicit input from your team to ensure *maximum emotional ownership* of the plan—and then *monitor progress* and *measure implementation*.

In few organizations are the right answers to these questions pervasively and accurately known and acted upon.

What Can You Do?

To infuse the answers to these questions into the thoughts and actions of your team, take four steps:

1. Survey your customers—involve your team. Enlist input from team members to create the initial questions.

2. Survey your team (internal customers)

Choose an objective method to conduct these surveys. Assure and enforce 100 percent confidence and privacy if requested. Disseminate only an amalgamated list of findings. Enlist objective, independent outside assistance.

3. Disseminate the answers and refine the questioning process. After conducting customer surveys, you'll find areas that need more or less questioning. You'll also find the *Sweet Spot*—the area Drucker points to with questions 3 and 4. Here is where you can identify the value you *uniquely* impart to your customer. Identify and quantify this, qualify and make credible with third-party references (customers), and create questions that elicit a qualification in new prospects and you've identified the Holy Grail of consultative selling—*Creating the Questioning Vocabulary*. Organizations that believe in and benefit from *Partnering* vs. *Transactional* relationships must evolve the selling to a *Qualification Process* using questions that quantify value to the point that *engagement becomes an obvious decision*.

4. Use the findings to create, execute, and maintain your plan—communicate the findings and act on feedback. Customers' and employees' enthusiasm and focus are engendered when they see the findings. Reviewing findings helps to secure customer's commitment to the relationship when they see that you are addressing issues and see the other *good reasons to stay engaged* that other customers bring up. Report on facets of all

three areas: 1) *The Good*: What are we doing well? Why do you continue to buy from us vs. the competition? 2) *The Bad*: What could we do better? What do you like about the competition? And 3) *The New*: What would you like to see us add or do differently? What are your top challenges as it relates to our serving you? If we could solve any of your XYZ problems, what would you want us to tackle first? Why haven't you bought our X, Y, or Z service? Since people want to know they've been heard, be sure to communicate, "as the result of your input we will be . . ."

Don't assume *the perceptions of the customer*. Conduct regular, systematic, qualitative surveys in the form of open-ended conversations that allow the customer to speak on any issue in a free, open, safe and objective forum. LE

Mark Faust is a consultant and speaker and author of *Growth or Bust*. Visit www.echelommanagement.com.

ACTION: Address and answer these five questions.