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Best regards,

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Leadership Summits That Work

How to stop putting your top people to sleep
by Bob Frisch and Cary Greene

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LEADERSHIP SUMMITS THAT WORK

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FREDRIK BRODÉN

EVERY YEAR, IN VIRTUALLY ALL LARGE AND MIDSIZE COMPANIES, HIGH-LEVEL LEADERS COME TOGETHER FOR A LEADERSHIP SUMMIT.

These events usually last two to four days and can rack up millions of dollars in costs: airfare and accommodations for the 50 to 500 or so attendees, fees for outside speakers, production expenses, the many person-days that go into planning, and the enormous opportunity cost incurred by taking so many top managers away from their normal duties for several days.

When executed well, these meetings are certainly worth the time and expense. They can serve as a powerful catalyst to align leaders, develop solutions to problems, introduce new strategies, and fuel collaboration across the organization. But many companies squander this rare opportunity to harness the collective knowledge of their frontline leaders.

The typical summit begins with a numbing sequence of platform presentations from a parade of C-level executives. Later sessions address topics, such as a new ad campaign or a product rollout schedule, that concern only a portion of the people in the room. A motivational speaker adds a dollop of entertainment. Some breakout sessions and an open-mic Q&A with the top team, emceed by the CEO, pass for an exchange of ideas.

Information, proposals, and solutions flow in only one direction—from the top down—and not all that coherently. Attendees leave only slightly better informed and better networked than when they arrived. It's usually not clear whether they've understood the messages they're supposed to take back to their people, much less what anyone would be expected to do as a result. A huge opportunity has been missed.

Contrary to what leaders and planners assume, you *can* have genuine and productive conversations with hundreds of people at once. Over the past decade we have designed and conducted leadership

summits for thousands of executives in scores of companies, ranging from *Fortune* 50 multinationals to German *Mittelstand* family businesses, and we've seen such conversations take place. Remarkably straightforward strategies and practices can ensure that information flows not only down from the top but also up from the group, and across it, in a way that allows leaders to direct the conversation without inhibiting creative responses. By applying the appropriate techniques before, during, and after the meeting, C-level leaders can get the full value of the knowledge of their frontline executives; see to it that participants leave with unambiguous messages that their employees can turn into action; and transform a meeting that often lulls people to sleep into an event that gets the organization's synapses firing.

Before the Summit

Why do CEOs and their top teams settle for less-than-optimal leadership conferences? A few executives may shy away from a real exchange of ideas for fear of losing control of the meeting. But most leaders and meeting planners simply assume that the events are too unwieldy to allow for much more than an annual update and marching orders from the top.

Here's how the planning process generally unfolds: Some six to 12 months in advance, a midlevel executive from HR, finance, strategy, marketing, or corporate communications is charged by the CEO or another top executive with planning the summit. He struggles to get on the executive team's calendar to discuss it. When he does, he uses his allotted 15 minutes to offer up some possible locations, three to five potential guest speakers, and a preliminary agenda seemingly related to a theme. Such themes are often so laughably vacuous—"One company, one vision,"

Idea in Brief

THE SITUATION

Most large and midsize companies bring together their 50 to 500 top executives every year for a leadership summit. When done well, these events are worth the considerable effort and expense.

THE PROBLEM

At most such conferences, information flows from the top down in a numbing series of discursive, disconnected PowerPoints, and sessions address topics relevant to only some people in the room. Participants leave slightly better informed than when they arrived.

THE SOLUTION

It is possible to have a productive conversation with hundreds of people at once. By carefully coordinating the event planning and applying some high- and low-tech practices during the summit, leaders can direct the conversation without inhibiting creative responses.

“Forward together,” “Creating a common future”—that virtually any presentation or activity could be made to fit them. Executive team members spend a few minutes reacting to the locations. They may suggest a few more speakers. And then they promptly forget about the summit until a few weeks before the event, when the planner starts reminding them that they need to pull their presentations together.

That’s when people start paying attention. C-level executives, division presidents, and function heads begin lobbying to add speaking slots or favored subjects to the agenda. The planner, lacking any real authority, attempts to allot them all time. Sometimes the CEO suddenly remakes the entire agenda. The result is a highly fragmented or superficial meeting conceived entirely from the perspective of top executives, with hardly a thought given to what the attendees are likely to take away from it, much less what they might contribute.

It doesn’t have to be like this. Because these complicated conferences are scheduled so far in advance, there’s plenty of time to take the steps needed to create a coherent, focused event.

Assign clear roles that have real authority.

Because the lines between directing, designing, planning, and coordinating a summit can blur, it often turns out that no one is clearly in charge of shaping the event. Roles and responsibilities should be clarified at the outset (see the exhibit “Who Should Do What?”). Rather than viewing meeting planning as a lower-level administrative function, the top executive convening the summit (the “meeting owner”) should designate a summit director and grant that person the authority to control the agenda and to say no to people asking to add things that don’t fit its focus. Working with a design team, the director should oversee the creation of all pre-meeting, in-meeting, and post-meeting materials



Who Should Do What?



MEETING OWNER

WHO: THE CEO OR A MEMBER OF THE EXECUTIVE TEAM

WHAT: INITIATES THE MEETING AND DESIGNATES A DIRECTOR

MAKES FINAL DECISIONS ON THE MEETING'S OBJECTIVES, STRUCTURE, AND DESIGN

RETAINS ULTIMATE ACCOUNTABILITY FOR ACHIEVEMENT OF THE OBJECTIVES



EXECUTIVE TEAM

WHAT: PROVIDES INPUT ON THE OBJECTIVES AND AGENDA
DEVELOPS CONTENT WITH THE HELP OF THE CONTENT EDITOR

PARTICIPATES IN PRESENTATIONS AND PANELS

TRACKS PROGRESS ON COMMITMENTS MADE AT THE SUMMIT



SUMMIT DIRECTOR

WHO: AN INTERNAL OR EXTERNAL STRATEGY, HR, OR MARKETING EXECUTIVE; REPORTS TO THE OWNER

WHAT: WORKS WITH THE OWNER AND THE EXECUTIVE TEAM TO CONFIRM OBJECTIVES

OWNS THE AGENDA

WORKS WITH THE DESIGN TEAM TO CREATE ALL MEETING MATERIALS AND ACTIVITIES

MANAGES THE PLANNING ON A DAILY BASIS



DESIGN TEAM

WHO: LED BY THE DIRECTOR; INCLUDES TWO OR THREE OTHER SENIOR EXECUTIVES

WHAT: CREATES THE DETAILED AGENDA

DEPLOYS AND ANALYZES ALL MEETING SURVEYS

CONFIRMS MEETING DESIGN

and activities. A coordinator, reporting to the director, should be appointed to handle scheduling, travel, production, and logistics with the venue. An emcee should be selected to introduce the sessions and speakers, smooth transitions, clarify questions from the audience to the speakers, and present instant polls and other social media input during the event. Facilitators are also needed to help guide small-group discussions.

Define a clear set of objectives for the conference by starting with the right questions. The summit director's first contact with the CEO and the executive team may need to include a discussion of locations—an issue that requires a long lead time. But that's not the most important topic. The director

should begin by asking two questions: "What do you want the outcome of the meeting to be from the perspective of the attendees?" and "What do you want them to say when their teams ask, 'What happened at the big meeting?'"

The answers aren't always readily apparent. But after some discussion, most executive teams develop a few concrete objectives. Depending on a company's circumstances, objectives might include aligning everyone around a common set of priorities, solving problems impeding company progress, driving a cultural transformation, or accelerating the integration of a major acquisition. Typically, executives will want to specify several outcomes, but the important point is to formulate them as outcomes, not as a grab bag of agenda items loosely connected by a vague theme.

Take, for example, a consumer products company we'll call Kallos, which has more than 35,000 employees and hundreds of thousands of sales reps. A new leader had succeeded a celebrity CEO, who in his wake left financial problems, low morale, and a culture that tolerated broken promises on the part of managers. The new CEO and his team, wishing to shake things up, developed five objectives for their summit of 200 executives: reach a realistic understanding of the current state of the company, including the need to drive growth; restore employees' faith in the brand; prepare to embark on a cost-reduction program in a way that would not adversely affect consumers; ensure that everyone understood what they needed to do in the near and long term to fulfill

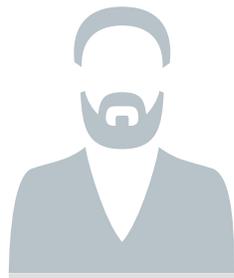
MOST LEADERS AND PLANNERS ASSUME THAT SUMMITS WON'T ALLOW FOR MUCH MORE THAN AN ANNUAL UPDATE AND MARCHING ORDERS FROM THE TOP.

**CONTENT EDITOR**

WHO: A MIDLEVEL STRATEGY OR COMMUNICATIONS EXECUTIVE OR A THIRD-PARTY SPEECHWRITER

WHAT: TASKED BY THE OWNER WITH OVERSEEING DEVELOPMENT OF CONTENT, ENSURING THAT ALL PRESENTATIONS ARE ALIGNED WITH THE OBJECTIVES AND COORDINATED WITH ONE ANOTHER

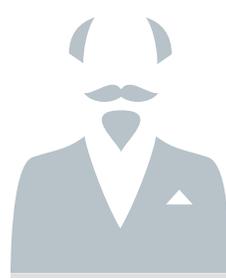
ATTENDS REHEARSALS AND PROVIDES FEEDBACK TO PRESENTERS

**COORDINATOR**

WHO: A MIDLEVEL EVENT PLANNING OR HR EXECUTIVE

WHAT: COORDINATES SCHEDULING, TRAVEL, AND LODGING

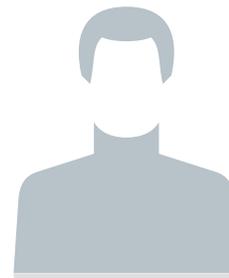
HANDLES VENUE LOGISTICS
COORDINATES WITH SPEAKERS AND OTHER OUTSIDE VENDORS

**EMCEE**

WHO: COULD BE THE OWNER, THE DIRECTOR, OR SOMEONE OUTSIDE THE COMPANY

WHAT: INTRODUCES SESSIONS AND SPEAKERS
CREATES SMOOTH TRANSITIONS BETWEEN SESSIONS

SUMMARIZES DISCUSSIONS, CLARIFIES QUESTIONS FROM AUDIENCE MEMBERS, AND PRESENTS INSTANT POLLING AND SOCIAL MEDIA INPUT DURING THE EVENT

**FACILITATORS**

WHAT: GUIDE SMALL-GROUP DISCUSSIONS IN BREAKOUT OR TABLE SESSIONS

those goals; and lay the groundwork to make sure everyone followed through on his or her promises.

Start the conversation before anyone leaves home. Eight to 10 weeks before the meeting, attendees should be surveyed so that the summit director can determine how much time to spend on each objective and identify related issues that should be addressed. To gauge people's current view of the five objectives, Kallos administered an anonymous survey that asked respondents, among other things, how proud they were of the quality and performance of the company's products, how comfortable they would be describing the financial situation of the company to a newly hired employee, and to what extent they believed that managers they dealt with on a day-to-day basis behaved as if they were accountable for their actions. When 90% of the 200 respondents indicated that they were proud of the brand, the focus of the objective "restore faith in the brand" was shifted to "determine how to communicate our pride in the brand to sales reps." Open-ended survey questions included the standard "What's the one question you or your team would like addressed at the upcoming conference?" and "If you were riding in the elevator with the CEO and could tell him the one thing that would most improve the company's prospects, what would it be?"

Design the summit around the objectives and coordinate the content. Podium presentations, breakouts, and interactive sessions should be not only relevant to the meeting objectives but also coordinated so that together they form a coherent

whole. This is commonsensical, but rare. That's because the first time anyone other than a speaker or a few of his reports hears any of the podium presentations is often at the meeting itself.

Focusing C-level and other stage presentations on the objectives and making sure the presentations tie together requires appointing an individual as a single point of editorial contact. This role may be filled by someone from HR or corporate communications, or by a third-party speechwriter, but whoever it is should enjoy the protection of the meeting owner, who must deflect attempts to interfere. Four to six weeks before the meeting, the content editor should begin to assist all presenters, including outside speakers, in using one or more of the meeting's objectives as the starting point and backbone of their presentations and to coordinate the presentations with one another. The editor should attend rehearsals and provide feedback. He must hold the line against presenters who say they have a few extra slides but promise they can get through them in the allotted time and those who try to cram mountains of information onto each slide. With the guidance of a firm editorial hand, hours of formerly "must have" presentations by a succession of C-level executives will be transformed into short, pithy, coordinated talks.

Engage participants in the issues in the days leading up to the summit. Seven to 10 days before the meeting, attendees can be given reading material focused on the objectives. Include only the minimum amount necessary to set up discussions



planned for the event. We've found that carefully focused and framed material usually takes no more than about 60 minutes to read.

An orientation webcast, similarly lasting no more than an hour, can also prepare participants to make meaningful contributions at the summit. For a luxury goods company, a key objective of an upcoming leadership conference was to prepare the organization for a new global e-commerce division, which would supplant an outmoded regional structure. Before the meeting, participants were required to

join in on one of three webcasts conducted by the new division head, who used a few simple diagrams to explain the new operating structure and then answered typed-in questions from participants. Instead of wasting valuable conference time explaining the structure, top leaders were able to have a problem-solving session about its implementation with knowledgeable, well-prepared attendees—the people who would ultimately have to make the new structure work.

During the Summit

Solid pre-meeting work clarifies the objectives, coordinates the content, and initiates engagement with attendees. The design and execution of the meeting itself should make that work come alive in what is in essence a series of structured conversations, carefully orchestrated to generate ideas, alignment, and, often, surprises along the way. Employing some simple principles and tools can make that happen.

Pay attention to the pace and rhythm of the meeting. Kallos kicked off its conference with a brief (15-minute) keynote in which the CEO introduced the meeting objectives and framed what was going to unfold. Day one was devoted to the first two objectives: understanding the current state of the company and communicating pride in the brand. Two 20-minute podium presentations, each focused on one objective, were broken up by exercises performed by each table and breakout sessions, followed by reports to the entire assembly. During lunch, a guest speaker addressed the drivers of successful direct selling, offered a case study, and took questions from the audience. After lunch, presentations from the product and marketing group, along with several exercises, focused on communicating pride in the brand, particularly to sales reps. Day two—featuring a similar mix of presentations, exercises, and breakouts, and a Q&A with the executive team—was devoted to the remaining objectives: cost reduction, accountability, and commitment. An abbreviated day three included breakouts by region and concluded with a call to action from the CEO and promises from the executive team to track and support the commitments individuals and groups had made during the summit.

Allow for flexibility within sessions. Given the many moving parts of large, multiday meetings—presentations, breaks, meals, breakouts, audiovisual setup, and the like—deviation from the schedule is

The Right Tool to Gather Input from a Crowd

	RESPONSE		PARTICIPANTS		QUESTIONS	
	ANONYMOUS	PUBLIC	INDIVIDUAL	GROUP	OPEN-ENDED	PREDEFINED OPTIONS
PRE-MEETING						
Survey	●	●	●		●	●
Webcast Q&A		●	●		●	
IN-MEETING						
Question cards	●		●	●	●	
Keypad polling	●		●	●		●
Poker chip game		●	●	●		●
Text-in answers	●		●	●	●	●
Table discussions		●		●	●	
Breakouts		●		●	●	
Pairs		●		●	●	
Commitment worksheets		●	●	●	●	
Give and Get		●	●		●	
POST-MEETING						
Survey	●	●	●		●	●
Intracorporate social network	●	●	●		●	

impossible. Even so, flexibility can be maintained *within* sessions to address issues that arise or to pursue productive lines of discussion. For example, at the luxury goods company's leadership summit, the division president conducted an instant poll asking attendees if they would feel comfortable explaining to others a strategy she'd just outlined. When a large percentage of the 90 people there said no, she asked participants to anonymously submit written questions, which she addressed on the spot. Only after a second instant poll indicated that virtually all attendees were comfortable explaining the strategy to others did the session proceed as planned.

Improve the quality and effectiveness of top-down communication. During conferences, top-down communication generally takes place in three ways: podium presentations, videos, and Q&As with the executive team. If the editor responsible for coordinating content has done a good job, the podium presentations will be succinct and integrated. We have found that an ideal podium session includes no more than four presenters who speak for 15 to 20 minutes each, using just five to seven slides.

Most leadership summits also include an open-mic Q&A session in which attendees ask questions

of the CEO or the executive team. The worthy intent is to provide unvarnished answers from the top in response to what's really on people's minds. But what actually happens is wearily predictable: impromptu speeches disguised as questions, multipart inquiries requiring time-consuming answers, softball questions intended to curry favor with the leaders, and questions relevant to only a handful of people in the room—to all of which the leaders must extemporize answers. Meanwhile, attendees who are hesitant to raise provocative (or any) issues in front of a large audience remain silent.

There is a better way. If you hold the Q&A on the second day, you can ask people to submit questions at the end of day one. That evening, the summit director, editor, and meeting owner can select the best questions and add ones they feel should have been asked; the executive team can formulate responses to the more provocative ones; and the rest can be parceled out to the appropriate executive team members. Many leaders resist this technique as somehow manipulative or undemocratic, feeling that an open mic is more honest. We argue that, in fact, this approach is ultimately more democratic, because it ensures that a cross-section of questions

are answered in a way that brings substance to what is often an empty exercise.

Use high- and low-tech approaches to capture the thinking of frontline executives and communicate it upward. Numerous techniques can be employed to harvest the ideas of conference attendees. To determine which tool to use when, the director should ask four closely related questions:

- What kind of input is needed: Opinions? Questions? Brainstorming? Solutions to a specific problem? Complex judgments?
- What characteristics should the communication have: Anonymous or public? Guided or open-ended? In real time or delayed?
- What's the right unit from which to get that kind of input: Individuals? Small tables? Larger breakout groups?
- What are the most effective tools for gathering that kind of input from that unit: Polling? Discussion templates? Worksheets? Complex exercises? (See the exhibit "The Right Tool to Gather Input from a Crowd.")

Polling technology as simple as a wireless keypad or an app accessed through a smartphone or web browser allows participants to respond to yes-or-no questions or to indicate how much they agree with statements such as "I am confident that we will achieve our revenue goals for the next two years." Polling results can be projected at the front of the room in real time for everyone to see (the luxury goods company did this). Text messages work well when more-substantive answers are desired, as when 140 attendees at a leadership conference for an information management company were asked to name the biggest obstacle to the company's achieving its growth goals. Among the responses were: "We lack focus," "Too many initiatives distract our attention," "We lack new products," "The plan to grow is not clear," and "Our ability to attract and retain top-notch talent is questionable." The responses were compiled and a subset was displayed on a screen at the front of the room for discussion.

Such audience response systems can also facilitate highly complex group deliberations during breakout sessions. Take, for example, an exercise we call "the poker chip game," first described in "Off-Sites That Work" (HBR, June 2006), which allows small groups using a game board and some poker chips to determine how a company should allocate its resources. Thanks to technology advances, the results of such exercises can be displayed instantly, providing comprehensive feedback to guide further deliberation.

Kallos conducted this game with its 200 attendees, who were divided among 20 tables. Each table was given 66 poker chips and a game board on which to allocate the discretionary portion of the annual \$3.3 billion operating budget. The result was eye-opening for top management. Every table significantly reduced the amount of money budgeted for product development and packaging and increased



Countdown to the Leadership Summit

	4–6 MONTHS	90 DAYS	60 DAYS	30 DAYS	1–2 WEEKS	DURING	AFTER
Objectives	Begin conversations on desired outcomes.	Discuss potential objectives.	Solicit input on potential objectives from key stakeholders.	Establish final set of objectives.	Include objectives in pre-meeting reading material.	Regularly remind attendees of the objectives.	
Content		Determine required materials for pre-meeting readings and summit presentations.	Hold pre-meeting webcast. Deploy pre-meeting survey.	Compile survey results. Draft pre-meeting readings and session material.	Distribute reading material to attendees. Finalize session content.	Compile input gathered through breakouts, keypad polls, etc.	Deploy post-meeting survey. Distribute summit output and other communication aids.
Meeting Design and Structure	Appoint summit director and assemble design team.	Determine topics and sequencing.	Design high-level agenda.	Refine structure on the basis of survey results. Draft detailed agenda, including tools to gather input.	Conduct final walk-through of detailed agenda.	Remind attendees of structure and agenda.	Follow up on commitments. Establish forums for continued collaboration.
Speakers and Presenters	Identify potential outside speakers.	Secure outside speakers.	Determine internal presenters and discuss potential objectives. Select emcee.	Review internal presentations.	Conduct rehearsals with presenters and emcee. Confirm external speakers.	Ensure that speakers and presenters understand their roles.	
Logistics	Select venue and finalize dates.	Send meeting invites. Finalize travel arrangements.		Walk through the venue and confirm details, including agenda timing.	Secure supplies and make table and breakout assignments. Test audiovisual equipment.	Coordinate ad hoc needs with venue.	

the allocation for marketing. In the healthy discussion that ensued, a consensus emerged that growth was being constrained by an inability to tell consumers a compelling story.

Many old-school, low-tech tools are still remarkably effective in gathering input, including 3 x 5 cards on which participants write questions; color-coded cards, which participants can hold up in response to questions; templates to guide small-group discussions; and reports from breakout sessions.

Such tools can make brainstorming, often unwieldy and unfocused when conducted with hundreds of people, more productive. Using a technique called “self-facilitated dialogue,” Kallos had pairs of participants spend 10 minutes in a conversation, guided by a paper template, about what the company should *start* doing, *stop* doing, and *continue* doing in the next six months to implement a strategy for increasing revenue. A member of each pair recorded the results of the conversation on the template. Another template was used to capture the suggestions from all five dialogues around the table and to communicate those results to the entire assembly.

A “round robin” variation of the breakout can be particularly effective in eliciting a full range of

reactions to a series of issues. Instead of having 200 people sit through podium presentations on each of the five objectives, for instance, Kallos broke attendees into five groups of 40. Five executive team members, each responsible for explaining one of the objectives, rotated through the groups. Participants asked questions and provided input on every objective (captured on the lowly flip chart), an opportunity that top-down podium explanations cannot provide.

Make sure ideas flow across the meeting to lay the groundwork for genuine collaboration afterward. The summit may be the only time in the year when many participants see one another. Yet all too often, connections are left to happen by chance—at meals, in breakout groups, or during coffee breaks and cocktail hours. To connect in a deliberate and more constructive way, we use an exercise we call “Give and Get.”

Typically, this exercise is part of a breakout session with anywhere from 30 to 60 people. Two charts, one labeled “Give” and the other marked “Get,” hang on opposite walls. On each chart, each participant is assigned a column with his or her photo, name, function, business unit, and location at the top.



FURTHER READING

For insight into the top team's annual strategy meeting, read this article on HBR.org.

"Off-Sites That Work"

Bob Frisch and
Logan Chandler

In the Get column, each participant posts a card that completes this sentence: "If I could get help in one area that would make me and my team more successful in the coming year, it would be..." The card is like a classified ad, asking for a particular type of expertise or assistance. Perhaps someone needs help developing a product feature, reconfiguring a plant layout, or adjusting a customer contract to achieve a certain outcome. In the Give column, the participant posts a card that completes the sentence "If I could name one area in which my team and I have developed expertise that may be useful to others in the company, it would be..."

After all the Give and Get cards have been posted, participants are given Post-it notes and asked to circulate around the room. If a participant sees a Get that she or someone she knows could address, she leaves a Post-it with a message about how she might be able to assist. If she sees a Give that could be helpful to her, she places a Post-it with a message under the card.

Once participants have posted all their offers to assist and requests for help, they switch rooms with another breakout group and survey the Gives and Gets on those walls. If each breakout room holds 50 people, each participant will see 100 requests for help and 100 offers. Those 200 Gives and Gets typically generate hundreds of Post-its, creating a network of connections across locations, functions, and business units. After the meeting, all the Gives and Gets are recorded and distributed to the appropriate individuals for follow-up.

These and other exercises, designed to ripple far beyond the walls of the meeting venue, can be explicitly tied to the objectives of the summit. Kallos, for instance, used a technique called the "Wall of Commitments" to further its goal of getting participants to follow through on their promises.

Here's how it worked: The packet each participant received on arrival contained worksheets printed on carbonless copy paper. At the end of day one, largely devoted to top-line growth, participants filled out a worksheet that asked them to list specific steps they and their teams would take to increase revenue immediately, in the coming three months, and in the coming 12 months. They handed in the original and kept the copy.

During the evening, unbeknownst to the attendees, 200 linear feet of eight-foot foam-board walls were constructed in the auditorium. Participants'

commitment sheets were posted on the walls under their names, affiliations, and photos. After dinner, the nine members of the executive committee went around the room with a stack of Post-it notes imprinted with their own names and posted comments on the commitment sheets. The comments ranged from "Great idea" and "Let me know if I can help with that" to "This is disappointing" and "I was hoping you were more ambitious than this."

The following morning, when the 200 participants walked into the auditorium, their reaction, as intended, was shock. As they wandered the perimeter of the room reading the comments about their own and their colleagues' commitments, some were visibly embarrassed. During the next two days, the commitment sheets that were generated to address the other objectives—which were added to the walls—became more thoughtful. Not only did the quality of the promised actions greatly improve, but attendees learned what colleagues throughout the organization would be focusing on in the coming months, creating opportunities for collaboration. In several instances, participants formed teams to work on initiatives, coordinate their efforts, or establish discussion groups about commitments that dovetailed.

The element of surprise in this exercise can have a galvanizing effect, and identifying individuals creates opportunities for networking. But both features can be adjusted. For example, to spur ambitious commitments from the outset, participants can be warned that the executive team members will comment on their posts. To avoid embarrassing participants, the comments can be provided to them individually rather than posted publicly. Because Kallos was looking to jump-start a culture change, it dialed up both features.

After the Summit

Because companies generally don't design leadership conferences around concrete objectives, they typically pay little attention to what happens afterward. Morale may have been lifted, but the absence of clear direction usually results in halfhearted follow-up and few tangible outcomes. If, however, you've begun with a purpose in mind, you can do some simple things to make sure it is achieved.

Create succinct materials for attendees to take home. The real moment of truth for a summit occurs when leaders return to their divisions, regions, or functions, and people ask, "So, what happened at

the meeting?” Those leaders should be able to answer clearly and explain the implications. But that’s hard to do if all they’ve brought back is a notepad full of haphazard observations, doodles, and a few vague slogans, as so often happens. Far better to supply them with communication aids such as talking points, pithy presentations, or video links to drive home the objectives of the meeting and form the basis of discussions with their teams. Meeting participants are encouraged to add their own content to make the messaging relevant. In some cases we have conducted sessions before the close of the meeting in which leaders, working with tablemates, simulate communicating major points to their teams and get feedback on both content and style.

Ensure that all commitments made at the summit—up, down, and across the organization—are kept. Answers to all questions that were not addressed at the meeting, whether from executive team leaders or from attendees, should be provided within one to two weeks. What’s more, the executive team should track progress on any initiatives or commitments undertaken. Thirty days after the Kallos summit, each participant received an e-mail from an executive committee member listing the actions that person had committed to in the “next 30 days” section of his or her worksheet, followed by a single sentence: “Shoot me a quick e-mail letting me know how these went.”

Continue the conversation. Within 48 hours of the meeting’s conclusion, conduct a survey to see if the goals were fulfilled and to ask participants about what worked, what could be improved, and what should be jettisoned for next year’s summit. Repeating the pre-meeting survey questions will give you valuable insights into the impact of the event. For example, the percentage of people saying they fully understood the company’s growth strategy rose from 37% in Kallos’s pre-meeting survey to 82% after the summit, and the percentage describing themselves as “optimistic” or “very optimistic” about the company’s prospects rose from 49% to 80%. To encourage collaboration within teams or discussion groups that emerged at the summit, either by design or by happenstance, enable attendees to continue the conversation among themselves through an intracorporate social network.

BY ADJUSTING HOW INFORMATION flows—more up, more effectively down, and a lot more across—you

can turn a leadership summit into a high point of the annual management calendar, one that makes a real difference. Leaders will know in advance that they’ll be heard. People across the organization will understand what the results of the meeting mean for them. Executive committee members will know that they’re going to get valuable input and that the meeting will be well worth the considerable investment. And enthusiasm will build for each succeeding summit, as people look forward to a memorable event that’s strategically significant for everyone. ♥

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