BI Radio
Episode 3: Meetings and Mobility

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Montage:
- "No amount of data will make the decision for you. "
- "There should be something at stake worth caring about".
- "What we offer is access".
- "We can do a lot more on mobile devices than we ever could before".
- "I think that the devices have come a long way".
- "Almost two thirds use applications beyond email and voice".
- "Is a mobile device a place where you can consume your intelligence information?"
- "I mean, as much as I like gadgets, I only have so many pockets".

Ken Seeley: Hi there, and welcome to BI Radio. I'm Ken Seeley. On the show today, Meetings and Mobility. How to make your meetings more effective, and how mobility makes us more productive. We talked to co-CEO of Research and Motion about the brave new world of business intelligence on the BlackBerry. And our own Technology Soup panel is back to look at why mobile devices are on the top of their Buzz Index. But first up, why a good meeting is like a good movie. Our own Kelsey Howarth talks to Patrick Lencioni about why meetings are important, and how good ones can improve corporate performance; and the four types of meetings that every company should have.

(01:15)

Kelsey Howarth: Hi. I'm Kelsey Howarth. Are your meetings good, bad or downright deadly? Over the years there's been no better source of inspiration on ways to transform a lifeless meeting into an engaging and profitable experience than Patrick Lencioni. Patrick is the author of six bestselling business books, an acclaimed public speaker, and the founder and president of The Table Group, a management consulting firm that focuses on organizational health. Today, you'll listen in as we discuss his best seller, Death by Meeting.

Kelsey Howarth: Death by Meeting. Loved the book. Wonderful. You state that bad meetings are the most painful problem in business. How does a company know if its meetings have become deadly?

Patrick Lencioni: Well, if they're boring, that's a good sign that they're problematic. If people dread going to them, that's a pretty good sign. I mean, those are the telltale signs. People should actually look forward to going to meetings and they should not be bored when they're there. Now that's sounds crazy, I know. But the truth of the matter is, good meetings are interesting; and more importantly, it's where real work gets done. And when people perceive meetings as something you do instead of work, that's a big problem.

Kelsey Howarth: Now you've had a theory that a good meeting is like a good movie. How so?

Patrick Lencioni: Well, it should get peoples attention early on. A great movie hooks its audience early, in the first ten minutes. And it should hold people's attention. There should be real conflict taking place. In other words, there should be something at stake worth caring about. And at the end, there should be some sort of resolution.

Kelsey Howarth: Now, encouraging conflict and drama in a meeting would seem like a hard sell. Don't most managers feel that it's there role to smooth conflict, and limit the drama in meetings?

Patrick Lencioni: Exactly, which is why meetings are so boring. The truth is, meetings aren't suppose to be easy and comfortable. They're supposed to be places where difficult decisions are made. And if you take the drama out and the conflict out you're not going to really be talking about the right things, and really getting at the heart of the issues. And you're not going to engage people and get their best from them either. So you're absolutely right: That's what most managers think. And that's where they are mistaken.

Kelsey Howarth: Your fix for bad meetings is not less meetings but actually more meetings of a different nature. Can you explain the four types of meetings you recommend?

Patrick Lencioni: Right. I like to say that most companies have one big meeting every week and they wonder why it doesn't work. And I refer to that as meeting stew: they throw every potential ingredient that could go into a meeting into this one big staff meeting. And in fact, people need to be having multiple kinds of meetings with very different purposes and with clearer context around why they're there.

Patrick Lencioni: The four different kinds of meetings are, the first is: administrative meetings which are just really check-ins; daily, like, what's everybody doing today? No agenda. No problem solving. Just basically social check-in with one another so people know what they're doing.

Patrick Lencioni: The next kind of meeting is usually a weekly tactical meeting, which is just where people talk about - how are we doing against our near term goals? What's holding us back? And what kind of problems do we need to resolve so we can actually accomplish those goals? It's not about strategy. It's not about brainstorming. It's about solving practical problems that keep us from being where we need to get.

Patrick Lencioni: The next kind of meeting is what we call a strategic or topical meeting and this should happen whenever it's needed. And certainly, if it's not happening at least once a month then you're not doing enough of them. And this is where you actually take one topic, a big topic that is going to have an impact on your future, and you spend two hours, or more, focused on that one topic until you've wrestled it to the ground. These kinds of meetings are actually very fun because they're focused on really solving a big problem. And these are where people have to debate, and brainstorm, and push on each other, and draw on their levels of experience and perspective. So, that's the third kind.

Patrick Lencioni: The last kind of meeting that companies need to have, and this one I do believe needs to happen once every quarter and that is, there needs to be quarterly offsite reviews where you just step back from the business and breathe and kind of reassess where you stand as a team, as an executive team; strategic viability in terms of what your competitors are doing, what's going on in the market, what your best employees are doing, what your worst employees are doing. So it's stepping back and getting perspective. It's slowing down to go fast. So those are the four kinds of meetings. Usually we talk about those things in a very mixed-up way in a meeting and people don't know. Are we making a decision? Are we brainstorming? Is this a long term issue? Is this a short term issue? And the answer is "yes", it's all of those. And that's why we get so frustrated because we have no context in our meeting.

Kelsey Howarth: We spoke with David Axson of the Sonax Group and he was saying that a fundamental mistake that organizations make in their yearly plans and budgets is too much detail; that

strategic plans, and budgets, and items get lost amidst a host of expense line items that don't mean much in the grand scheme of things. Now there's a place, I guess, in the tactical meetings that you recommend for this. But most companies try and jam a lot of these things into that same weekly meeting. Correct?

Patrick Lencioni: Absolutely. What they try to do is they take on everything. I like to compare it to what we do at home, which doesn't work very well, where we're standing in front of the bathroom mirror brushing our teeth, standing next to our husband or wife, and we're trying to decide where to go on vacation, what to get for dinner that night, who's picking up the kids, whether one of our kids should go to a counselor, and whether we should have another baby, all in the same conversation. And the truth is, human beings cannot process on all those different levels in the same conversation. And why we think that's going to work at work is beyond me. We need to be clearer about why we're having a meeting and what we're trying to get done there. And until we do that people are going to be frustrated. Because it's not actually what they're talking about that they're unhappy with at meetings. It's the fact that they don't feel like they're getting anything done and it's wasting their time.

Kelsey Howarth: Now one of the things I found interesting in your book is you talk about, rather than always sending emails to people, to actually stroll over to them and go have a normal conversation. Has technology distanced us from one another in terms of meetings as well?

Patrick Lencioni: Well I think what it's done is it's made us feel like we have permission or that we're able to accomplish the same things without being face to face. And while technology has done good things in terms of when we positively can't be face to face, it's helped us make those kind of interactions better. It still has not allowed us to make the kinds of decisions we need to make, or work together as a team as though we were in the same room. There's no substitute for being in the same room and for developing those kinds of relationships.

Kelsey Howarth: I wonder about the death by PowerPoint as well in meetings.

Patrick Lencioni: Gosh! It's PowerPoint and it's Microsoft Excel; it's all the details, the numbers. People need to be talking about ideas and concepts and decisions. And a spreadsheet or a PowerPoint presentation does not suffice. They can be helpful background. But most of the conversations people need to have are not about numbers. They're about ideas and principles, and decisions that need to be made.

Kelsey Howarth: One of the things that our customers say time and again is the value of Cognos in meetings is that they can come into the meeting with an agreed on version of the truth; that they have metrics, they have scorecards, they have plans that they've all agreed on in advance and they can move on to those deeper issues. Can you talk to the value of that at all?

Patrick Lencioni: Exactly. What it does is the decision science and the data that Cognos brings to the table allows people to not spend their time wading through details; but it informs them about what's really going on so that they can have those difficult conversations where no amount of data will make the decision for you.

Kelsey Howarth: For more information on how your company can avoid "death by meeting", please visit the Table Group Website at table group dot com. To find out how to get Patrick to speak at your next event please visit the Sweeney Agency at The Sweeney Agency dot com. Finally, to read more interviews with Patrick please visit the Cognos Performance Perspectives News Letter on the Cognos dot com homepage.

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(11:05)

Don Campbell: Hi. I'm Don Campbell, Vice President, Platform Strategy and Technology.

Anastasia Valentine: And I'm Anastasia Valentine, Product Manager.

Stephan Jou: I'm Stephan Jou, Technical Architect.

Andrew Kowal: And I'm Andrew Kowal, Product Manager.

Don Campbell: So guys, we talk a lot about the technologies that exist in our space, in our industry. Everybody knows about databases, and OLAP, and all of those kind of things. But there are other technologies, some of them reaching a buzz, sort of heightened energy around now. And we try to track them and try and keep on top of them so that we understand where our customers might be going, where the industries might be going, where everyone is going in this space and put them together into a thing we call the Buzz Index. Lots of things make the buzz index from quarter to quarter. Things like virtualization, or the Web 2.0 – things like that. I think it's a good way for us to keep on top of what's happening in the industry.

Andrew Kowal: The buzz index has recently shown mobile as something that's been talked about a lot in our industry. And mobile has been garnering a lot of attention in the BI space in particular, in the product performance management space.

Don Campbell: So why is that? What's so new about mobile? Everyone's had cellular phones and the ability to take their laptops and go different places with them and take information with them. What's so new and "buzzy" about mobility?

Anastasia Valentine: I think it's because more people are actually using mobile devices, and not just phones, because cellular phones have been around for quite some time. But actually using PDA type mobile devices where they have information with them, whether it be the to-do list, their email, their other applications, Google Maps, Google Earth; you can get all that in the mobile devices. You can just have more information at your fingertips.

Andrew Kowal: Do we think too that the eye phone had something to do with the buzz as well simply because for the longest time I've been, I mean, as much as I like gadgets I only have so many pockets and it would be really, really nice to be able to have an MP3 player, digital camera if you need one but, PDA, cell phone, all of these things in a package that is a single package that I don't have battery problems. It's always connected. Do you think that that is a part of buzziness is the fact that people are starting to realize that you can do so much more with the device?

Stephan Jou: Yes for sure. Advances in the hardware around mobile have been part of it as well. We can do a lot more on mobile devices that we ever could before. Before, you're right: It was all

about cell phones, and that's it. Now, all of a sudden, people are looking at their cell phone and they realize, "Hey, it's a little computer". And if you couple that with the fact that more and more people are away from their desk, and all of a sudden you have an alternative way to process the information, not just the PC on your desktop.

Anastasia Valentine: And I think the devices have come a long way because if you think of all-in-one devices in general outside of the mobile space, you're always compromising the quality of one aspect or all aspects of the all-in-one capabilities. With the new devices these cameras are really good. They're not 1 or 2 megapixels. The radio signals are really good. The capabilities, even some of the voice capabilities are really good.

Stephan Jou: They have file systems. They have encryption built in. These are quite powerful devices now. Much more powerful than even regular PCs of three or four years ago.

Don Campbell: And a transition point I think is that fact that you don't need to create custom applications specifically for the device in all cases. You can leverage the internet. And what Web-apps exist out there and the fact that you can now go to Web browser on one of these mobile devices and experience this same sort of Web page that you would see if you were at your desktop.

Andrew Kowal: To what degree do we think that there's going to be a convergence or conflict between laptops and mobile devices? So people who are sitting in Starbucks right now, are they going to be suddenly, instead of going to a slate, they're just going to say "To heck with it, I'm going to go right to my mobile device". Or is the thrill factor still not going to work? Or will it work in some cases?

Anastasia Valentine: I think that mobile devices are going to be more prevalent than your laptop computer. I'm mean look at the wifi capabilities on these mobile devices. You can go to Starbucks and connect to the net. And that's just absolutely excellent in comparison to lugging your laptop around, making sure that there's power source, and all of that. I mean, I would much rather grab my mobile device out of my purse and use that.

Stephan Jou: I think they're both mobile devices. I'll probably always have a small handheld device. But there's a time or certain sets of applications where I really need a keyboard, I really need a large screen, and then I'll put down my small cell phone and move to a larger device. But what's great is nowadays that device doesn't have to be tethered to my desk. It can still be a full-fledged computer, but now it just happens to be mobile and it's got a cell connection or a wifi connection.

Don Campbell: There are some companies out there that are deploying en masse mobile devices in exchange for having the laptop. So as a cost reduction and an infrastructure management savings they're going to mobile devices. They have to provide them all with cell phones anyway. So this way, they get them better cell phones. They can do all the things they needed to do on a laptop while they're in their mobile role which might be mobile sales force or something like that.

Andrew Kowal: Or repair people, or what-have-you, that need to be mobile, that need to be able to access information, need to be able to call back; but they don't need to run Word.

Don Campbell: And they need it on ruggedized devices even. Not necessarily just the fancy pretty ones but the ones that can be bounced on the tarmac out in the airports or something like that, if they need to.

Anastasia Valentine: But I don't see the ability right now for us to get rid of one or the other device. We still have to have our laptops because they have the capabilities that some of the mobile devices don't have. And we still need our mobile devices because they're portable, and they're easy to use, easy to access. And I think what needs to happen in order for us to consider deciding on one single device is that the mobile devices have to become more advanced, networks have to become more capable, definitely faster, or, the laptop devices need to get smaller. So at the end of the day that looks like a smaller device that can do a heck of a lot more than either one can do on its own today.

Don Campbell: So what about as a viable business tool, beyond email, which of course, has viability. Is the mobile device a place where you can consume your intelligence information? Is it something now where the time is right to consume this kind of information on a mobile device?

Anastasia Valentine: Absolutely. Absolutely. I think with the mobile devices being distributed beyond the executive community, so this limited community, it's a perfect opportunity to start delivering information that someone would have access to on a daily basis at their desk. Not only the folks who have that challenge of having to come in in the morning from a remote location, or who travel, but just people who need access to information wherever they are. And that might be a cafeteria. It might be on the way to work. It doesn't necessarily have to be from a remote location.

Don Campbell: So the applications that are necessary for business decision making can be brought to mobile devices outside of just purely text in an email and allowing you to be just as effective, and just as time sensitive for your information decision making, but you can do it outside of the building as well as you can do it inside.

Stephan Jou: Yes. And there are two types of applications. There are new applications that are now being developed because we have so much more capable hardware. And we are taking existing applications and essentially making them available in a mobile type environment, handling things like online, offline, security, things that we have to consider now that we're mobile.

Don Campbell: So does that create an increase stress for IT?

Stephan Jou: Well, my IT friends would say "yes".

Don Campbell: Security is always, of course, a concern. But I think we're learning more about how to deal with security. But it certainly is a concern for many people.

Stephan Jou: Yeah, it's a growing reality too though. Even if there wasn't a mobile internal strategy in place already more and more mobile devices are coming into the workforce just through normal consumer routes. So it's something that has to be faced at some point.

Don Campbell: So lots of great technology advancing how we think of our business intelligence information, mobile being a big part of it. And we'll keep track of more trends in technology as we go forward. Thanks everyone.

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Ken Seeley: Welcome back. Did you know that at this moment there are about six million BlackBerries in use around the world, and a lot of information flying back and forth between them. What if some of that information was BI? Well, it's soon to be a reality. We asked Jim Balsillie, the co-CEO of Research In Motion, why there's value in putting Performance Management in the palm of your hand.

John Blackmore: I'm John Blackmore, with Cognos. Most people are familiar with the BlackBerry. If they don't own one they definitely seen one in use. Jim, give us a sense of scale. How has the wireless message market grown since you introduced the BlackBerry in 1999? How many people have them today?

Jim Balsillie: Around six million people have BlackBerrys. And we have about 80,000 Servers installed out in different organizations around the world. So it's definitely grown tremendously, one hundred percent or close to one hundred percent growth every year on a compounded basis. And we see the opportunity growing tremendously. So we're dealing currently with about 170 carriers around the world; 180 I should say. Another 130 in backlog. So about 300 carriers we're dealing with, close to 100 countries, 80,000 Servers going to 100,000. It's a very, very high growth market. A very, very exciting market.

John Blackmore: BlackBerry users quickly find them indispensable, so I can understand why it grows so quickly. There's actually a great quote on your Web-site from a journalist who declares, "That's right: I'm in love with your BlackBerry". How do you see business intelligence reports and scorecards on those BlackBerrys taking that must-have quality to another level?

Jim Balsillie: Well, I think it's natural. Of our 80,000 Servers out there, about almost two thirds use applications beyond email and voice on their BlackBerry. So people have already discovered this capability. And BI is a natural, natural. At the core, what we offer is access. Generally, people are fairly satisfied with their applications. We've seen out there it's much more about an access event driven relationship. And that's certainly, we've seen that in messaging where you take a session pull environment like email and make it sessionless push. And you take a couple orders of magnitude out of the latency of collaboration, well the same opportunity exists for virtually all time sensitive corporate applications. And none is greater than BI.

John Blackmore: When you talk about access you have offered that access to business intelligence reports on the BlackBerry before. What's new or different with this Cognos announcement in the business intelligence you're now going to offer to your customers?

Jim Balsillie: Well, definitely Cognos has been very, very aggressive, and creative and innovative in the wireless space. Existing BI approaches tend to be more browser based in what Cognos is doing. And that is definitely a key start. Where you're really pushing it to the next level is with a richer client experience where you have rich rendering of how you want the data presented, you have very easy drill down, you have online/offline capability with a lot of caching. And so I think that just makes a much, much richer user experience. And because it also sets up a greater use of the alerting function. So again, when people get business intelligence data, especially dynamic, they're looking for how can I react to this? And so having all kinds of associative data, and event driven data, and drilldown capabilities, and richer presentation, just better supports that decision making process.

John Blackmore: So you can actually manipulate your business intelligence reports using the thumbwheel and other devices on the BlackBerry?

Jim Balsillie: It's remarkable. You can absolutely look at the data. You can get a presented the way you like it. You can drill down dynamically. You can see if one area is performing well and others not; try to figure out why. You can save up historical data to compare, to have comparables. So much of data becomes information when it's put in a richer context. And so it's about both having the online real-time data; but also giving it all the context that help make it so valuable.

John Blackmore: With this more dynamic business intelligence that we'll be able to offer on the BlackBerry, what do you think would be some of the killer applications for this type of reporting?

Jim Balsillie: It's as broad as there are areas of dynamic business intelligence. I mean clearly, the easy low hanging fruit is sales performance and marketing program performance where you look at key indicators of how programs are performing and how sales regions, or products, or people are performing. And then you can drill down and get comparables, and get contextualized on that to really see if there's a problem, or see if there's a bigger opportunity. But also, there's all other kinds of business intelligence where it's very dynamic, very real-time operations, metrics for services, production performance, and uptime facilities in the field, and capacity and response times. Really, anything that has a dynamic operating performance element to it just lends itself so naturally to extending that information to an event driven wireless push architecture.

John Blackmore: Jim, when you talk about the BlackBerry a word that you always come back to is access. It's people to people communication anywhere in anyway. How do you see this new element, the business reaching out and communicating with you in its language of reports and metrics, changing the BlackBerry market and, by extension, even business itself?

Jim Balsillie: Well, it's pretty important because you know most studies on efficiency will tell you that the overwhelming opportunity for greater business efficiency is in the management area. So that's the area where you can really have a dynamic of new productivity of much greater productivity. And it's fundamentally about information and decisions and responsiveness. So it's an overwhelming opportunity to really make organizations much more online, much more real-time, much more responsive. The reality of business today is people are mobile. They're not sitting at their desk for 8 or 9 hours a day. They're in meetings. They're onsite. They're offsite. They're traveling. And teams collaborate much more and synthesize all kinds of new information and dynamics. So how does a company get information, disseminate information and collaborate? It's really by having some form of online collaboration and information alerting and sharing architectures. And definitely an integrated BI system plays naturally in unlocking that competitive advantage and productivity.

John Blackmore: Jim, thank you very much. It's been a pleasure speaking with you. And thanks for your insights on this new world of business intelligence and mobile communications.

Jim Balsillie: The pleasure is all mine.

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Ken Seeley: Well that brings us to the end of another episode of BI Radio. I would like to thank our guests Patrick Lencioni, and Jim Balsillie. And our Technology Soup panel of Don Campbell, Anastasia Valentine, Stephan Jou, and Andrew Kowal. Thanks as well to contributing producers John Blackmore and Kelsey Howarth. And finally, I would like to thank our producer and recording engineer Derek Schraner for composing all the original music you hear on BI Radio and for making us sound so good. A reminder to check us out at radio cognos dot com where you can download any of our programs, read the transcripts, and find additional information about the stories you've heard on our show. If you have a question, or care to comment about BI Radio, send us an email at radio at cognos dot com. I'm Ken Seeley. Thanks for listening. See you again in six weeks.

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