



Kingbridge
Meeting Designer

RAND-M Corporation

Integrated Viewpoints Report



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Overview

Background:

This report is based on the information gathered through the GAN team members who participated in a half hour perspective taking exercise in our software.

Participants:

Team Participants: 8
Number of Insights: 507

Challenge Statement:

The challenge statement that the team focused on throughout this process was:

'How might we use our meeting to generate the ideas that will assist us to prepare a plan to achieve our objectives?'

Situation: The RAND-M Corporation was looking to have a meeting with a third party to explore the creation of a new product that may be distributed as a partnership.



Perceived Meeting Competencies



Strength of Teams

- innovative
- committed
- adaptive
- hardworking
- Smart
- motivated
- successful
- agile framework
- desire
- doers

Improvements to Team

- easily distracted
- change direction quickly
- self-serving
- ageing
- aggressive
- divergent personalities
- admission of weakness
- benchmarking
- changing too fast
- reliance on past success

Dept. Strengths

- agile
- adaptive
- innovative
- nimble
- motivated
- Small staff
- getting perspective
- in tune with trends
- work to fix
- investigative

Dept. Weakness

- resources
- easily distracted
- small staff
- change direction quickly
- sales ability
- need sales strategy
- self-evaluation
- Small team
- turnover
- understanding of client needs

Team Ideas for Meeting Objectives

Hope to get out of Meeting	#1 Dept Challenge	Expect to Accomplish Together
<ul style="list-style-type: none"> timelines mutually benefitting partnership selling mechanism commitment why good fit 	<ul style="list-style-type: none"> selling selling evolving product creating standards scalability value without customization 	<ul style="list-style-type: none"> breaking historic thinking patterns bonding different perspective free thinking listening

Top Combined Meeting Objectives

1. selling	4. mutually benefitting partners	7. bonding
2. timelines	5. selling evolving product	8. commitment
3. breaking historic thinking patterns	6. selling mechanism	9. different perspective

Team Ideas for Agenda Items

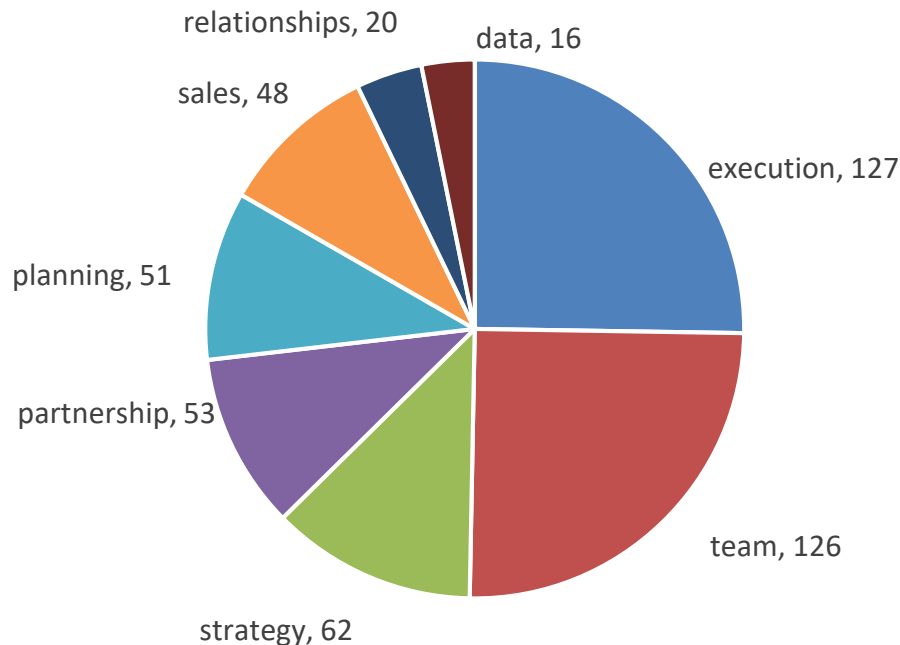
Most Important Agenda Items	Top 3 Challenges	2 nd Perspective Suggestion
<ul style="list-style-type: none"> • meeting all partners needs • becoming profitable • our role in partners work • relationship with partner • client needs 	<ul style="list-style-type: none"> ▪ pace of proceeding ▪ managing personalities ▪ getting to revenue ▪ timelines ▪ marketing collateral 	<ul style="list-style-type: none"> ▪ getting to revenue ▪ driving revenue ▪ meet client needs ▪ need for model ▪ timing

Top Combined Agenda Items

1. getting to revenue	4. driving revenue	7. need for model
2. pace of proceeding	5. meet client needs	8. timing
3. managing personalities	6. repeatable sales	9. scale of work needed

Top Things on Your Team's Mind About Your Meeting

of Theme Occurrences



Top Concepts Discussed

- listening
- preparation
- focus
- clear action plan
- support
- benefit all parties
- meeting types suited for
- this exercise
- getting to revenue
- time

Identified Important Team Outcomes



	1	2	3	4	5+
Coming up with Action Items					
Understand the Challenges Better					
Know Team Members Better on a Personal Basis					
Collaboration better with the Team					

Number of times voted as “very important”

Deep Conversations Your Team Wants to Have to Move Ahead

Deep Conversations



If we only have the resource to work with one partner, is this the right partner to focus on?



Will this add enough value to our partner's clients to make it worth their time?



Do we need to make staffing changes (role or position), to deal with our repeated distractions?

Important Conversations



Does the partner have the resources and focus required to assist us?



How do we get both teams aligned to maximize the sales opportunity for both?



Is the product ready to launch or should we do more testing?



How much work do we need to do with direct clients before launch?

LEGEND

Conversation based on:

 Worry,  Barrier or  Synthesis

Collective Team View on Needs & Values



The Team's Top 10 Team Needs

1. G - listening
2. **preparation**
3. Support
4. time
5. leadership
6. **perspective taking**
7. **Sharing data**
8. Sharing expertise
9. **benefit all parties**
10. **collaborate**

The Team's Top 10 Individual Needs

1. clear action plan
2. timelines
3. **facilitation**
4. **scheduling engagements**
5. **how big could this get**
6. **just for one partner**
7. **other partners an option**
8. possible partners in same space
9. **potential revenue**
10. **need for consultants**

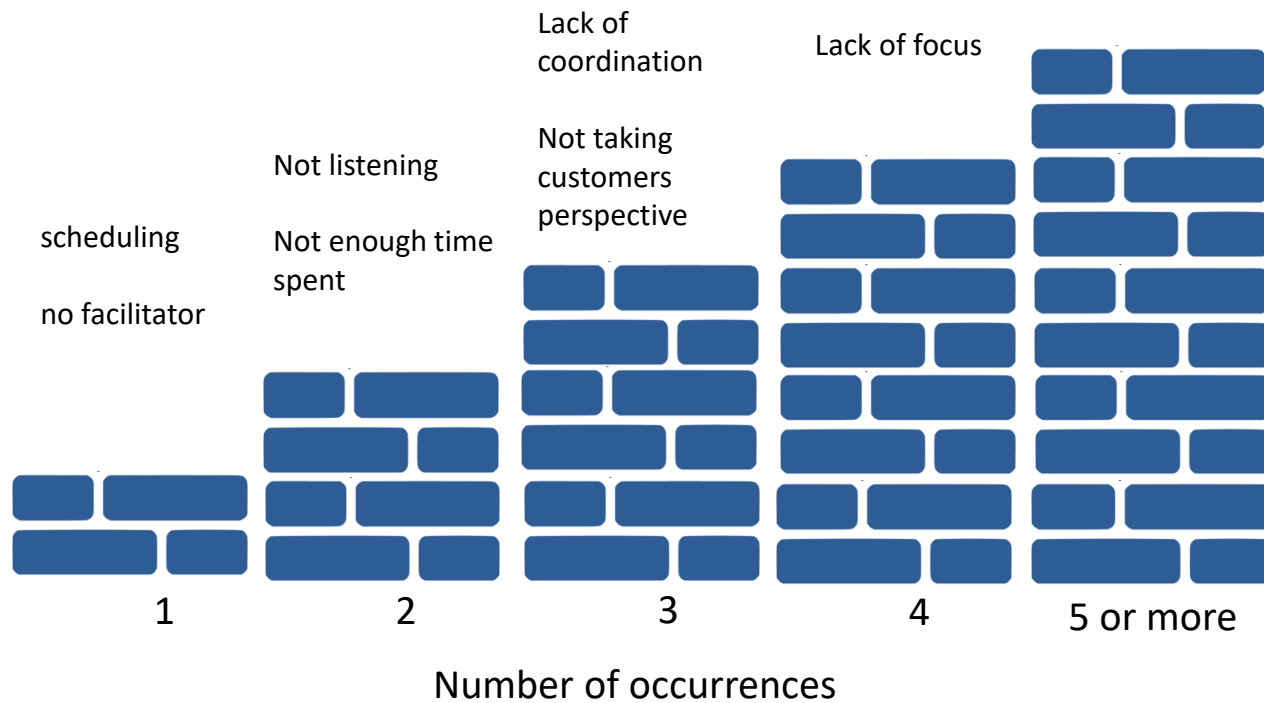
The Team's Top 10 Individual Values

1. **focus**
2. **getting to revenue**
3. **pulled in same direction**
4. **Suppressed desired outcomes**
5. **everyone on same page**
6. **meeting research**
7. **meeting types suited for**
8. **stuck to agenda**
9. **this exercise**
10. **thorough**

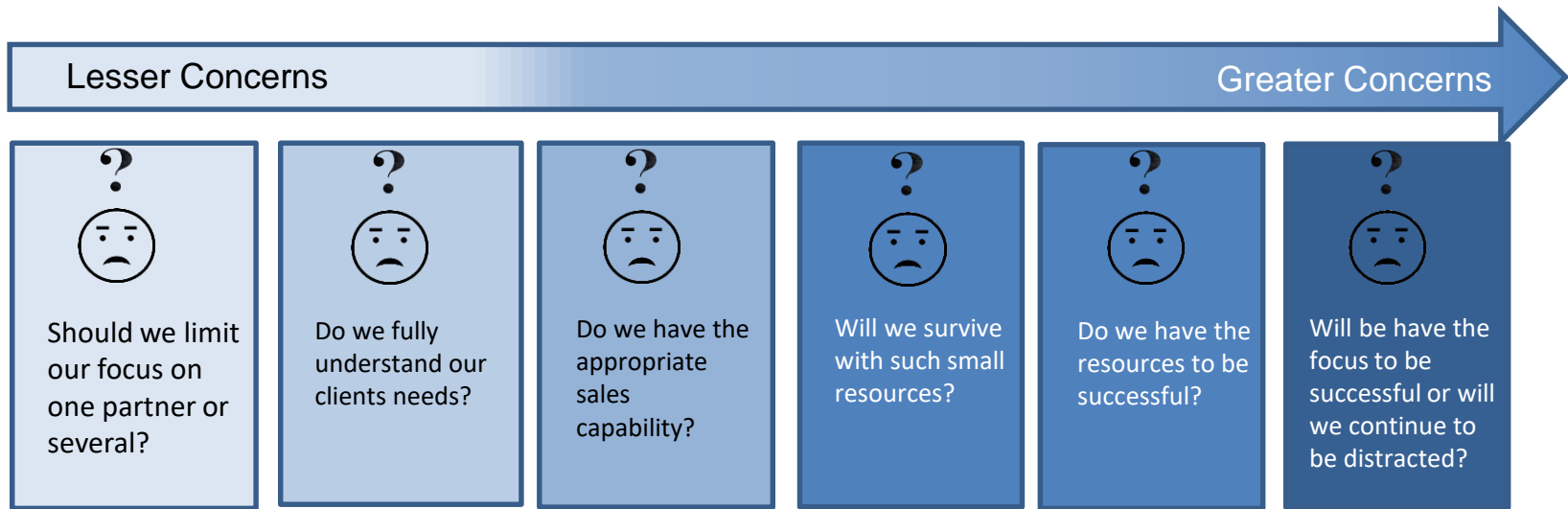
Bold entries were generated from the 2nd or 3rd perspective
(i.e. not the normal way of thinking)
G – Indicates Groove, (answer found in all 3 levels)



Barriers to Meeting Success



Team Worry Map





Team Attitudes and Engagement

Negative -----> Positive

Participants	Total Insights	Engagement	Anger	Sadness	Fear	Tentative	Analytical	Confidence	Joy
1	55	90							
2	54	90							
3	63	92							
4	75	89							
5	68	93							
6	75	87							
7	62	95							
8	55	94							

Action Steps

4+ Occurrences:



Team to be willing to listen to new ideas
Take steps to prepare a formal plan

3 Occurrences:



Collaborate with partner – establish consistent vision
Engage sales and marketing resources

2 Occurrences:



Develop sales model
Develop sales metrics

1 Occurrence:



Implementation of CRM
Develop formal vision statement for this product

Understanding your

Kingbridge Meeting Designer
Report

Supporting
Help Files



Using the Power of Perspectives

The Proven Benefits of Perspective Taking

Perspective taking has several known scientific benefits. When properly used, perspective taking activates a different part of the brain than what we normally use doing everyday activities. This process uncovers knowledge not normally thought about. VistaShift has developed a patented approach to formulating problems and conducting perspective taking to take advantage of this knowledge.

VistaShift's process involves collecting a team's information from 3 different perspectives:

The Normal Perspective – This is the what you normally think and how you normally think. It is also known as your starting, or usual, perspective.

The “Other” Perspective – [Small Stretch] Often the customer or competitor perspective. This is introduced into the process once the participants have received the tools and understanding on how to truly understand how to take another perspective.

The Optimal Distance Perspective – [Large Stretch] This perspective is generated by VistaShift to optimize the opportunity for creativity and unique insights.

For the purposes of this output, VistaShift for Teams is using the following definition:

Team Mindset: The habits of mind of the entire group, formed by previous experience and used as the basis of decisions and judgments.

Deep Conversation: Those that are based on the key findings from the team's responses that may show some vulnerability, cause some conflict, bring out inner feelings and emotions, and are vital to the meeting's success.

Research on Perspective Taking

The following list includes some of the key benefits of perspective taking which have been proven using scientific research.

- Increased empathy and understanding from taking another person's perspective.
- Strengthens social bonds.
- Increased positive attitudes towards others (team /client) - helps with solutions.
- Increases willingness to engage in intergroup contact.
- Helps to create better managers, by dealing better with uncertainty and diversity.

Additional details can be found at vistashift.com/unique-approach/

Understanding Your Perceived Meeting Competencies

Your team has self-identified a number of strengths and areas of improvement for both the team and the organization. They have been displayed visually and should be considered in conjunction with the barriers to a successful meeting that have been identified by the team.

Strength of Team	Improvements to Team	Dept. Strengths	Dept. Weakness
<ul style="list-style-type: none">• communicators• helpful• professional• knowledgeable• perspective• intelligent• leadership• organized• driven• network• supportive	<ul style="list-style-type: none">• power imbalance• sharing experiences• time• don't follow data• commitment• thinkers not doers• narrow expertise• negotiation skills	<ul style="list-style-type: none">• intelligent• agile• test• organized• community support• responsive• leadership• balanced• investigate• adaptive	<ul style="list-style-type: none">• marketing• opportunity seeking• breadth of expertise• outreach• cliques• resources• unwritten protocols• adaptable• education

Understanding Your Team Ideas for Meeting Objectives

Your team has identified what they think are the most important meeting objectives in several different ways. This report shows you the top 5 ideas from each perspective, and also the top 9 summarized from all 3 perspectives. This is designed to assist you in setting the meeting objective and ensuring nothing is missed.

Team Ideas for Meeting Objectives

Hope to get out of Meeting	#1 Dept Challenge	Expect to Accomplish Together
<ul style="list-style-type: none"> timelines mutually benefitting partnership selling mechanism commitment why good fit 	<ul style="list-style-type: none"> selling selling evolving product creating standards scalability value without customization 	<ul style="list-style-type: none"> breaking historic thinking patterns bonding different perspective free thinking listening
Top Combined Meeting Objectives Items		
1. selling	4. mutually benefitting partners	7. bonding
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Understanding Your Team Ideas for Agenda Items

Your team has identified what they think are the most important meeting objectives in several different ways. This report shows you the top 5 ideas from each perspective, and also the top 9 summarized from all 3 perspectives. This is designed to assist you in setting the meeting objective and ensuring nothing is missed.

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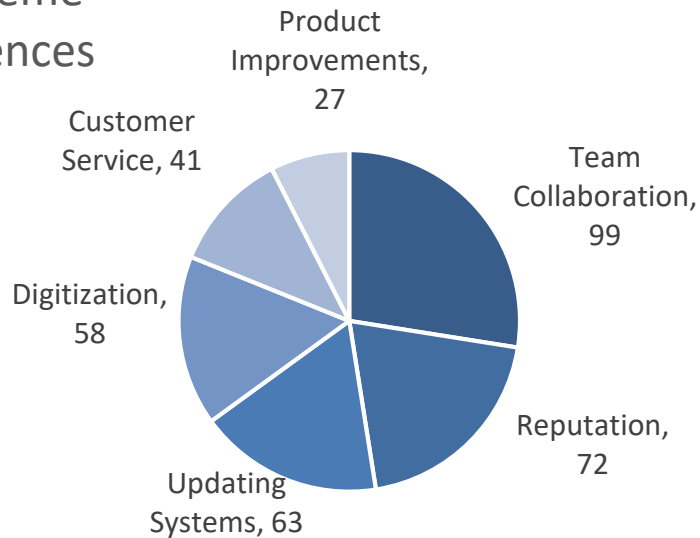
Most Important Agenda Items	Top 3 Challenges	2 nd Perspective Suggestion
<ul style="list-style-type: none"> meeting all partners needs becoming profitable our role in partners work relationship with partner client needs 	<ul style="list-style-type: none"> pace of proceeding managing personalities getting to revenue timelines marketing collateral 	<ul style="list-style-type: none"> getting to revenue driving revenue meet client needs need for model timing

Top Combined Agenda Items		
1. getting to revenue	4. driving revenue	7. need for model
2. pace of proceeding	5. meet client needs	8. timing
3. managing personalities	6. repeatable sales	9. scale of work needed

Understanding Your Top Things on Team's Mind About Your Meeting

Your top themes are the themes that were most commonly expressed by team members during their VistaShift exercise based on themes. They have been displayed in a pie chart for ease of understanding and comparison. In addition a summary of the actual concepts which occur most in answers is also included in a table.







of Theme Occurrences



Top Concepts Discussed
increasing sales
plan
reducing churn
Leadership changes
great discussion
collaboration
active participation
willingness to work
comparison to other companies in our segment
New product strategy

Understanding Your Identified Important Team Outcomes

Your team has identified meeting outcomes that are either very important, somewhat important or not important. This graphic displays those that were very important with each symbol representing a team member.

	1	2	3	4	5+
Collaborating Better With Team					
Deciding on Action Items					
Understanding the Business Challenges Better					
Engaging in Team Building Activities					
Socializing					
Getting to Know Team Members Better on a Personal Level					



 Number of times voted as “very important”

Understanding Your Deep and Important Conversations




These conversations have been identified as those that you need to have if you want to tackle the basic issues your team is dealing with. Deep conversations are pivotal and at the key of our issues. Important conversations normally have a lower sense of priority and may be issues that can be easily cleared up if the time is taken to discuss them.

Deep Conversations Your Team Wants to Have to Move Ahead

Deep Conversations

-  It is important to resolve
-  It is important to resolve

Important Conversations

-  It is important to resolve
-  It is important to resolve
-  It is important to resolve

LEGEND

Conversation based on:

 Worry,  Barrier or  Synthesis

This icon shows the source of the conversation and whether it is based on an identified worry, an identified barrier or a synthesis of several concepts.

Understanding Your Collective Team View on Needs & Values

Your Balanced Perspectives include a top 10 list of your needs, values, service offering values and emotional connections. One question from three different perspectives is used to formulate each balanced perspective.

This Balanced Perspective had been created by using your answers and considering several factors. The VistaShift algorithm includes: how many times the theme is mentioned, which perspective it was answered from, the overall and specific quality of the answers, the degree of creativity and other factors as well.

Each list has been evaluated for the team's alignment, confidence (sentiment) and engagement based on VistaShift's algorithm. For further information on the graphs, refer to the 'Understanding and Implementing the Graphs in the Balanced Perspective' in the following pages.

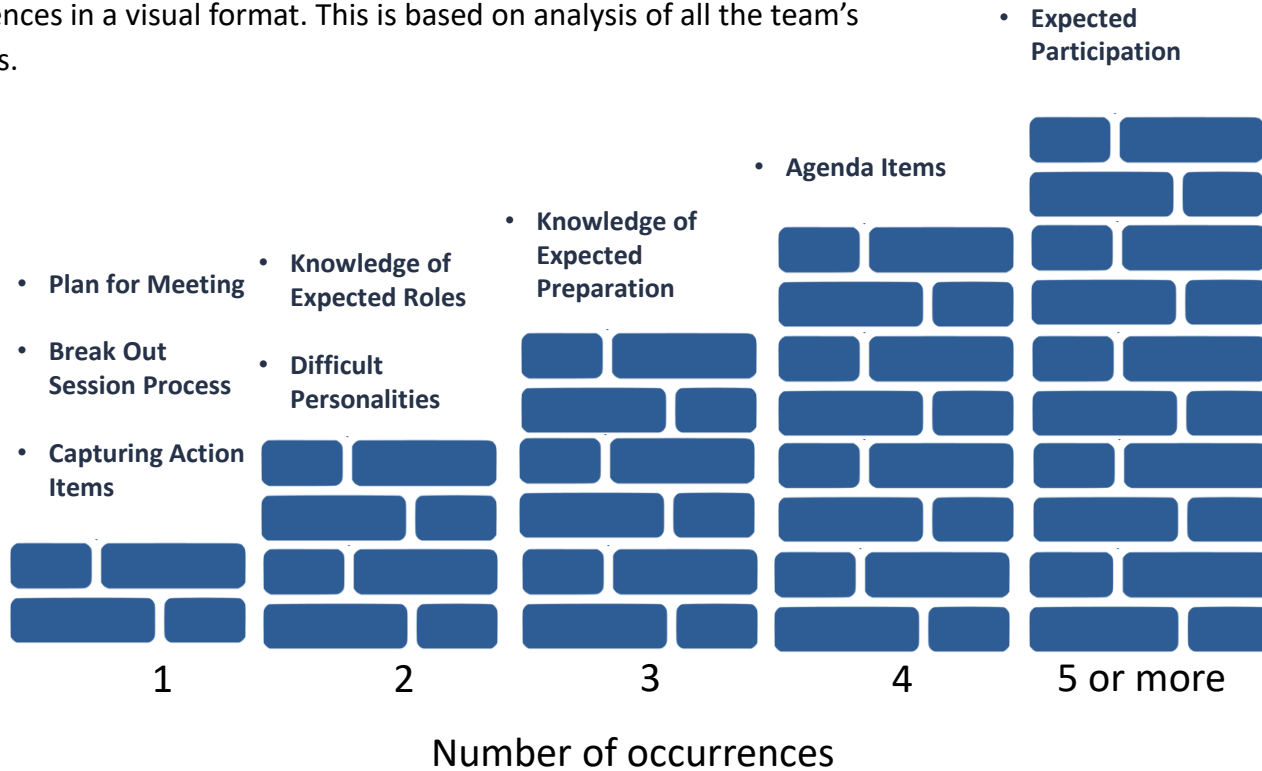
When trying to understand a team or its individual members it is important to identify both their needs and values as both will influence their behaviour. For our purposes, values are defined as recognizable behavioural traits. They are in our core and make us who we are. Needs are defined as our day-to-day impulses or urges related to the "now". You may find some overlap in your needs and values lists as your values help to define what you see as your needs.

Bold entries are information that is raised from the second or third perspective and is a result of new or stretch thinking. This represents some of the new thinking that is introduced by the VistaShift process.

If there is a G it indicates a "Groove". This means that the same answer was provided from each of the 3 different perspectives. This normally indicates a well understood truth, or potentially an idea that is "stuck" in the minds of the respondents.

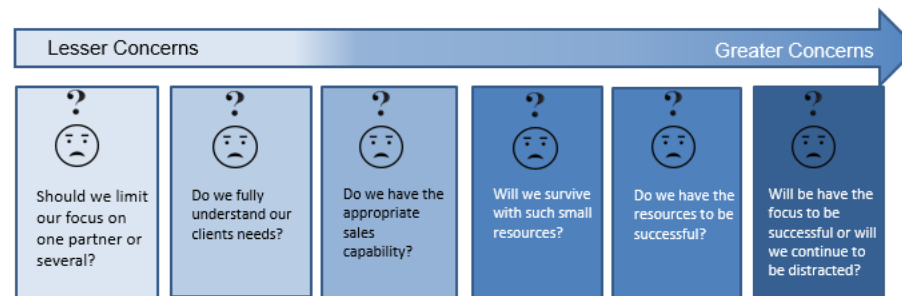
Understanding Your Barriers to Meeting Success

Identified barriers are defined as an obstacle that prevents the team from meeting the challenge. Barriers are plotted against the number of occurrences in a visual format. This is based on analysis of all the team's answers.



Understanding Your Worry Map

Based on all of your team's answers, these are your team's concerns or worries about the challenge. Some of these may be unspoken thoughts that team members don't normally have a chance to talk about it, or some of them might be the 'elephant in the room' – worries that the team may not want to address, but really know they should. Regardless, the thoughts here should be seen with validity and discussed to ease the worries of the team members. This would heighten the mutual understanding and involvement of all team members.



Understanding Your Attitudes and Engagement Analysis

Each client is first summarized by the number of insights they generated and their level of engagement.

The right hand table shows the sentiment of each participant, based on all of their answers in the perspective taking exercise, using an AI algorithm. Individual participants can express multiple sentiments. A description of each of the possible sentiments are:

Anger - Likelihood of writer being perceived as angry. Low value indicates unlikely to be perceived as angry. High value indicates very likely to be perceived as angry.

Fear - Likelihood of writer being perceived as scared. Low value indicates unlikely to be perceived as fearful. High value, very likely to be perceived as scared.

Joy - Joy or happiness has shades of enjoyment, satisfaction and pleasure. There is a sense of well-being, inner peace, love, safety and contentment.

Sadness - Likelihood of writer being perceived as sad. Low value, unlikely to be perceived as sad. High value very likely to be perceived as sad.

Analytical - A writer's reasoning and analytical attitude about things. Higher value, more likely to be perceived as intellectual, rational, systematic, emotionless, or impersonal.

Confident - A writer's degree of certainty. Higher value, more likely to be perceived as assured, collected, hopeful, or egotistical.

Tentative - A writer's degree of inhibition. Higher value, more likely to be perceived as questionable, doubtful, limited, or debatable.

Participants	Total Insights	Engagement	Negative -----> Positive						
			Anger	Sadness	Fear	Tentative	Analytical	Confidence	Joy
1	78	56	○	○	○	○	◐	◑	
2	57	63	○	○	○	◐	◑	◑	
3	50	93	○	○	○	○	◑	◑	
4	68	80	○	○	○	○	◐	◑	
5	48	74	○	○	◐	○	◐	◑	

Understanding Your Team Action Steps

These are the summarized list of action steps the team identified that they could take as next steps towards the challenge, based on the one question asked pertaining to this. The team should review these ideas for relevancy and prioritize the identified important ones.

4+ Occurrences:

Assist with pricing strategy

3 Occurrences:

Assess what PR work needs to be done
Revise selling story

2 Occurrences:

Gain Listings

1 Occurrence:

Develop social media strategy
Search for new distributor
Find strong endorsement that our customers will trust
Talk with current customers about proposed packaging

Team Technology Provided by VistaShift

