



# **Business Meetings**

## **Five steps to transform business meetings into productive, engaging work sessions.**

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## **Executive Summary**

This paper describes five steps for improving the quality and productivity of business meetings. It addresses how to use business mapping solutions first in the context of the generic meeting, and then for project planning and sales opportunity analysis.

The emerging field of business mapping offers business professionals and teams an effective way to electronically capture, organize and communicate the information, ideas, and activities that emerge from the typical business meeting. By providing business teams with an easy-to-learn way to document the brainstorming and planning that takes place at meetings, mapping software keeps teams focused, encourages participation and drives teams toward consensus.

Mindjet's MindManager® X5 Pro business mapping software is based on XML, an emerging file format actively supported by Microsoft and the World Wide Web Consortium. X5 Pro users can create meeting documents that capture ideas, information and data stored in legacy applications. Benefits include more efficient meetings, improved strategic planning, better view of complex information and processes, sounder decision making, improved project success, and greater team participation and enthusiasm.

## **Business Is Meetings**

***Business mapping solves 80 percent of the planning needs of 80 percent of knowledge workers.***

Business is all about meetings. Whether two people meet to strategize on how to close a sale or a large team assembles to initiate a major technology initiative, business happens when people come together. Meetings can happen locally or virtually. They can be energizing and engaging. Or they can just be endless. This paper will demonstrate how to use business mapping to improve each of the five steps of successful meeting management:

**Step 1: Gathering input**

**Step 2: Making sense of input**

**Step 3: Reaching conclusions, making decisions**

**Step 4: Communicating decisions**

**Step 5: Implementing decisions**

Despite its central role in the working day, the average business meeting is rarely effective and often dreaded. Attendees complain of being barraged with information to which they cannot react, of leaving the meeting with no clear understanding of next steps or assignments, and of having to deal with the onerous tasks of creating and reviewing lengthy meeting notes. Many collaboration applications try to improve meetings by offering businesses online places to meet. These places make it easier to share documents and access information, but don't improve the actual collaborative process. Business mapping transforms the meeting process by providing an altogether more efficient way to meet. Meetings that are run with maps stimulate brainstorming, encourage participation, keep everyone on the same page, and significantly reduce the tasks of documenting, communicating and monitoring the planning that has taken place and the decisions that have been made.

***“The biggest benefit we get from mapping is the way it creates a very participatory meeting environment, enabling our teams to quickly capture best thinking and make those ideas immediately actionable. And it does it in a way that drives commitment and buy-in. It represents a whole new way of thinking about collaboration.”***

Rick Hamilton, IT vice president, DFG Group

***“The net result is that MindManager helps me do in an hour the kind of strategic business planning that used to take me days.”***

Howard Kamerer, COO, Allied Telesyn

Mindjet’s new XML-based MindManager X5 Pro further advances meeting management. XML is the industry standard solution for Web services that connect people and information in a way that simplifies the exchange between applications of data and information. What this means is that business teams can now use the mapping process to improve meetings and then push conclusions and decisions into everything from project management software to CRM applications to internal business process and knowledge management tools. (Please see the Sales Opportunity Analysis section on page 14 for an explanation of how XML improves strategic planning and decision making.) Thanks to MindManager’s seamless integration with Microsoft® Office, meeting content can also be exported to Word®, PowerPoint®, Outlook®, and Project®, as well as to HTML to build Web pages.

## **I. Meeting Management**

One of the greatest value-adds business mapping brings to the meeting process is in making meetings more transparent to participants. This means that:

- Rather than simply helping teams share documents and emails, business maps provide a flexible, easy-to-understand, thought-provoking way for teams to come together, in a room or online, and think through business challenges together.
- Rather than keeping their own notes or relying on one person’s interpretation of the meeting, participants refer to a shared meeting map. The map provides a single, easy-to-understand visual documentation of the information assessed, the conclusions drawn, the steps to be taken, and the progress made on a given business initiative.
- Rather than requiring everyone to keep track of multiple project-related documents, a single map captures all related ideas, activities, task assignments, and documents—from internal process guidelines to spreadsheets to email threads.
- Rather than having to create special documentation to keep stakeholders informed and up to speed, users can instantly transform business maps into an unlimited number of forms—from Word documents to PowerPoint presentations to the contents of any XML-based system or application.

**Bottom Line: Business maps help meetings start quickly, move quickly, stay focused and push the team to results.**

**Note: To maximize productivity, business maps should be projected onto a screen inside the meeting room, or shared online via the company’s Web conferencing solution.**

## Step 1: Gathering Input

Business maps enable teams to pull together existing information such as data, documents, Web sites, RSS feeds and email—and then conduct brainstorming around that content to create “new information” such as ideas, insights, decisions and actions. The ability of knowledge workers to create new information is a company’s greatest asset. Business maps create the right environment for this to take place.

**Before the Meeting:** The difference business maps bring to the meeting process is felt from the first step—gathering input to create an agenda. Because the maps present information radially instead of linearly, users can rapidly brainstorm the items to be addressed. Whereas linear word processing tools force users to think in terms of what comes first on the agenda or what is most important, business maps let users simply think.



Image 1: Map of meeting agenda

Also, typical meeting agendas quickly expand to fill multiple pages. Business maps automatically adjust screen space so that a great many ideas can appear on one screen—a subtle but powerful difference that can significantly improve the thought process. Suddenly users find that they can see connections among tasks and ideas that would normally just be considered “next on the agenda.”

- Mgmt.  
Meeting
- I. IT initiatives
    - A. Calendar Application
    - B. Business Intelligence/Data Warehouse Tools
    - C. IT Documentation
  - II. Mgmt. Initiatives
    - A. Review/Define Company Mission
    - B. Establish Strategic Requirements
    - C. Prepare Clear & Attainable Objectives
  - III. Sales
    - A. Latest numbers
    - B. Major New Accounts
    - C. Outbound campaign
  - IV. Marketing
    - A. Trade shows
    - B. Lead gen
    - C. Web traffic
  - V. HR
  - VI. AOB

Image 2: Meeting agenda as simple text outline

**During the Meeting:** The mapping approach continues to improve the process once the meeting is in progress. Now able to view more information at once, users begins to see patterns, connections—and omissions. Compared with text outlines and slide shows, meetings run with business maps transform once-passive attendees into active participants. Attendees interact more because they can clearly see and understand the group’s thinking process captured in real time by the map. When someone contributes an idea or insight, he or she immediately sees that idea added to the agenda.

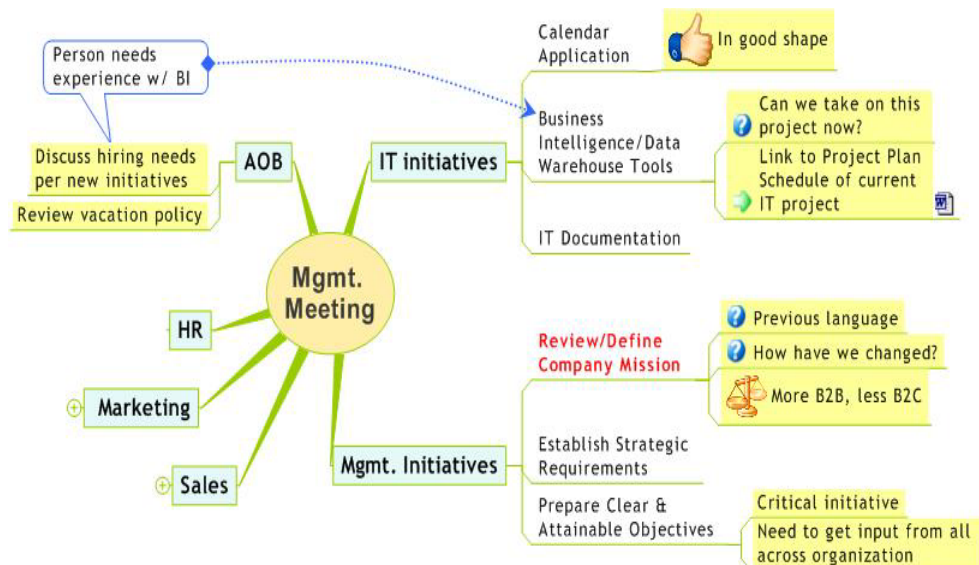


Image 3: Interacting with agenda items

## Step 2: Making sense of input

The average company communicates meeting minutes by means of lengthy text documents. At the same time, many of these same companies have tried to improve efficiency by instituting “one-page” rules, according to which no memo can be longer than a single typewritten page. These two colliding trends point to a basic information disconnect:

***The information we need to assess in order to make intelligent decisions is becoming more and more complex—but we have less and less time to analyze it.***

Business mapping solves this impasse by drawing on cognitive skills that employ other parts of the brain. The fact is that much of the information we rely on in our daily lives appears in forms other than text on a page. When we come to an intersection, we don't wait for a sign to change from “Stop” to “Go”: We wait for a light to change from red to green. When we want to get quickly from point A to point B, we don't wade through a list of directions: We look at a map. We survive in a complex physical world by using visual cue to quickly communicate a great deal of information. Taking this cue, business maps use a system of visual cues to capture and communicate more information more quickly.

***“We first measured MindManager’s success in terms of the significant time Aon management saved in determining key project tasks. Then we looked at the time project committee members saved by getting this information in a visual format that enabled them to quickly grasp exactly what was expected of them.”***

Glen Francis, eBusiness regional manager, AonAsia

**Radial Organization:** Business maps capture information and ideas radially rather than linearly. This arrangement helps users discover new connections and draw nonstandard conclusions, and inspires a free flow of ideas—the kind of thinking that leads to market-winning innovation.

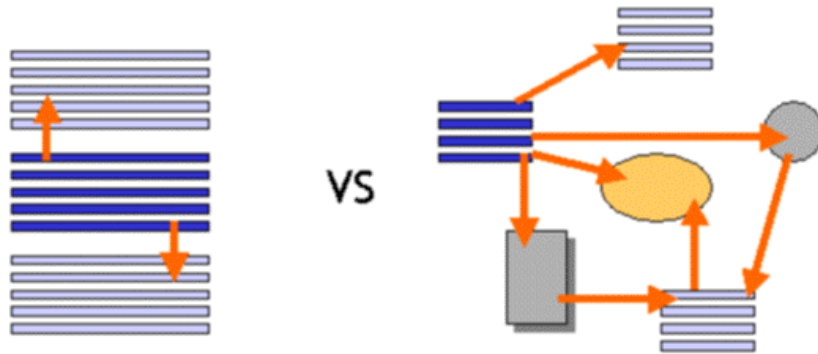


Image 4: Linear versus radial organization

***“The maps work better because they make it easier to see all the data at once—which is not just a matter of convenience. With everything laid out in front of you, you start to make connections you wouldn't otherwise make. It becomes not just a matter of speed, but of quality.”***

Dr. David Potter, R&D manager, Shawcor Ltd.

**Visual Vocabulary:** Business mapping software uses graphic icons, images and color to quickly communicate concepts. The meanings of some of these icons are self-evident: We all know at a glance what a stop sign or thumbs-up symbol means. Just the same, the map interface enables users to attach specific meaning to colors and icons. The result is an improved ability to capture a great deal of information in a small space—and to make that information readily understandable. This unique and useful combination of characteristics is available only in business maps.



Image 5: Using visual cues to convey meaning

**Filtering Information:** Unlike text-based applications, business maps make it possible to quickly view information subsets of a body of information. For example, the maps enable users to see only those tasks assigned to a particular team member. Or the map could be filtered to reveal only top priority tasks, or only problem areas, or only information suited to a particular audience. Because different parts of the map can be accessed so quickly, the maps can store a great deal of information in a single document. Individual users or teams decide how much and which content they need to see, rather than having to either deal with one large text document or create smaller documents.

In the following image, the map has been filtered to find all topics with a green highlight, which the user has defined to signify the tasks of one team member.

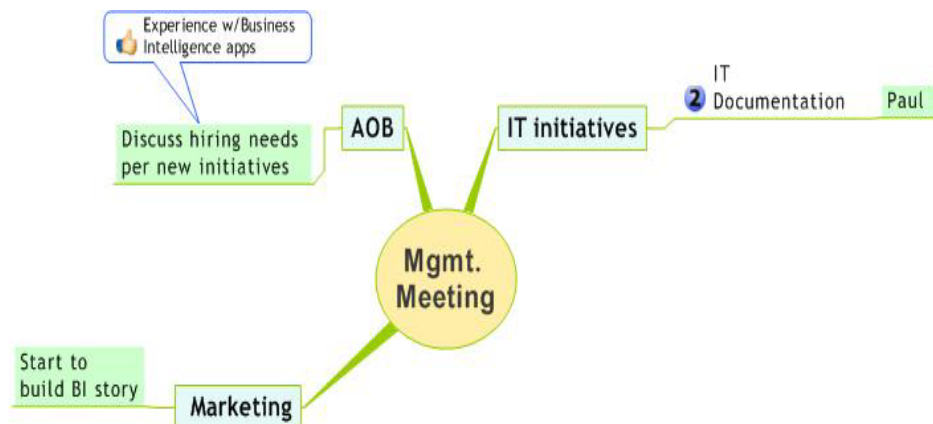


Image 6: Filtering for one person's assignments

The maps' combination of a radial interface, visual cues, and filtering capabilities make it easier for participants to interact with information. As will be seen in the project planning section below, the maps also enable users to toggle between the high-level view and access to details. The mapping approach provides a much more concise, creative, and productive way for business professionals to think and work together.

### Step 3: Reaching conclusions, making decisions

The value of a meeting is measured by the results that come from it—as well as the time it takes to attain those results. Business maps help teams see the factors and the choices before them, and provide instant access to a wide range of documentation needed to plan intelligently and make sound decisions.

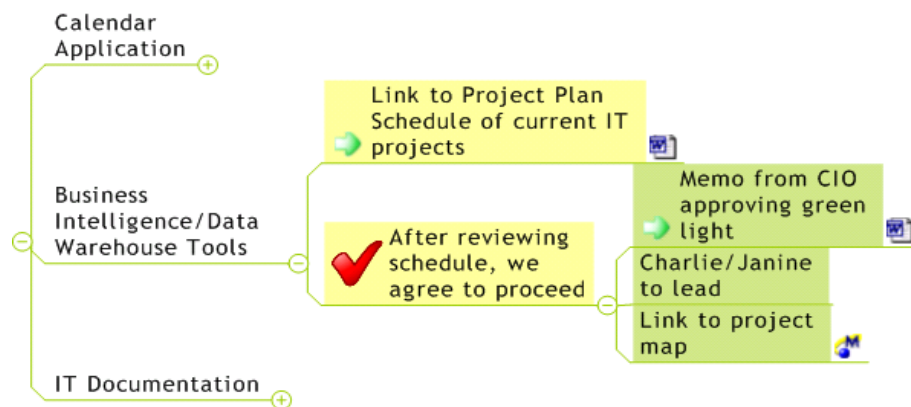


Image 7: Capturing planning, decisions, documents

Companies have various ways of capturing the plans and decisions formulated in meetings. In some cases one person, often a manager, is responsible for taking and circulating notes. In others, attendees are expected to take their own notes. Neither solution ensures that all team members have the same understanding of what took place at the meeting. Business maps do. They create one live, shared agenda that documents the issues being addressed and how they are being resolved. The maps also enable the team to communicate very clearly regarding assignments, due dates, and allocation of resources for each task or assignment.

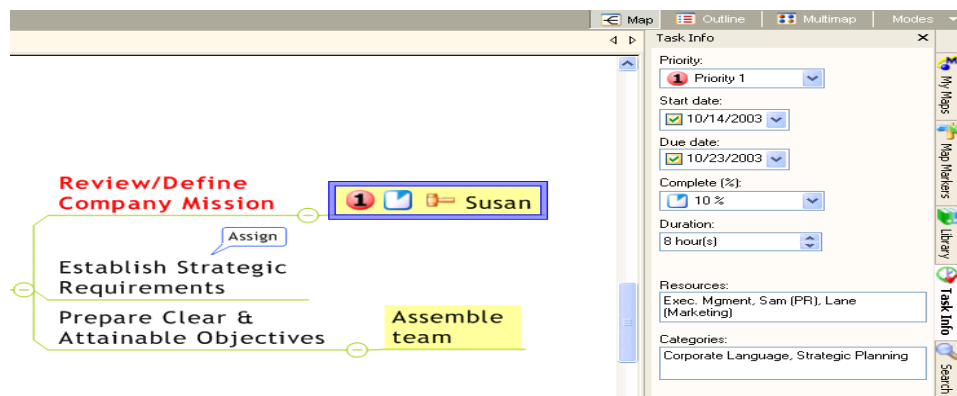


Image 8: Map task planning

When decisions are made in the context of a business-map-led meeting, there is no confusion about what needs to be done, who is going to do it, and when it needs to get done. As an added benefit, the thinking that led to the decision is clearly mapped for all to see, as is the implementation plan.

## Step 4: Communicating decisions

There are multiple audiences for most of the work done in meetings: the participants themselves, levels of management, and perhaps other departments and/or external partners or clients. The best way to convey to each audience what was accomplished is to create customized views of the meeting results. With traditional meeting tools, creating these unique views can be a cumbersome chore for a manager or team member. Business maps, on the other hand, enable teams to quickly create custom views of meeting results, all from the same original document.

While business maps are an excellent way of working together, in some cases it may be more appropriate to communicate meeting content to others in different forms. The meeting map can be easily exported to any XML-based application or database, to Microsoft Office tools such as Word, PowerPoint®, Outlook® and Project, to any MPX-based project management application, and to HTML to create Web pages and intranet content.

## Step 5: Implementing decisions

**The meeting at hand:** The conclusions and decisions reached in a meeting are usually implemented by means of a wide variety of actions and applications. The major role business maps fulfill during this stage of the process is to keep track of overall implementation, noting such things as change requests, changes in personnel, documents produced, etc. By creating clear, concise documentation of the implementation of a business initiative, the maps become an invaluable resource—a record of how the company arrived at and then implemented the results of its meetings.

**Future Meetings:** Business maps improve the productivity of each individual meeting—and of subsequent meetings. When team members need to prepare for the next meeting, they simply review the meeting map and complete any assignments, such as attaching requested documents, updating their progress on an assignment, or adding ideas or comments to particular agenda items. When they do that, they are adding to the historical record of that meeting or project—a document or set of linked documents that can be useful in the future. And with an investment of just a few minutes, team members can come to the meeting fully up to speed and ready to participate.

## II. Project Planning

Just as business mapping improves meeting management in general, it offers distinct advantages to teams planning specific projects as well. As with these other activities, mapping hits the ground running—its usefulness felt from the first step in the project planning process.

Too often, teams begin projects by assigning tasks and scheduling activities, instead of brainstorming about such things as alternate versions of how the project might be structured, what goals the project can (and cannot) achieve, and how success will be measured. Organizations rarely budget much time for this crucial, but often overlooked, Step. Business maps accelerate this kind of early-stage thinking, quickly capturing team

thinking about similar previous projects, adding members' insights, gathering input from stakeholders, and beginning to define the contours of the project.

Business maps help in the five basic steps of meeting management to make projects more successful:

## Step 1: Gathering input

Project management experts agree that the one factor that most contributes to project success is a team's ability to think clearly about a project before initiating it. Business maps provide the perfect setting for such front-end thinking. Whether projecting a map on a wall or sharing it online, teams can quickly come together to address such issues as project scope, goals, potential stakeholders, success measurements, and likely risks.

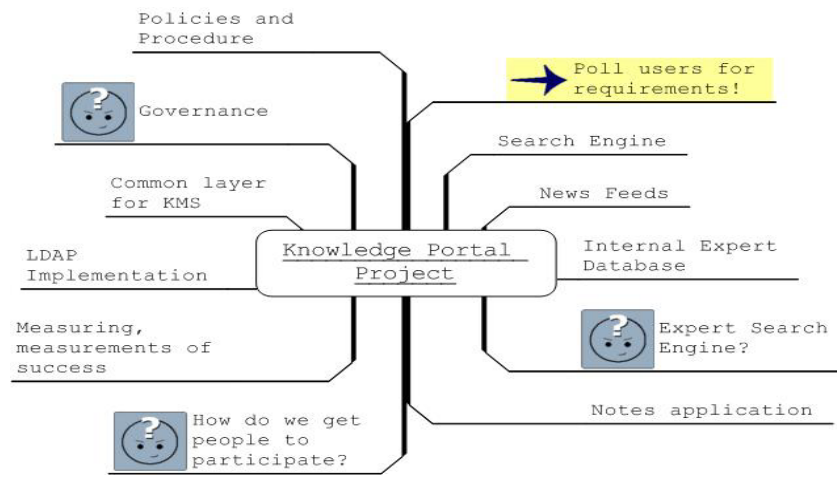


Image 9: Map of project pre-planning

In this example, a team pulled together to build a knowledge portal has correctly identified the need to gather user requirements early in the process. Here, in a separate map, they have gathered input from potential users:

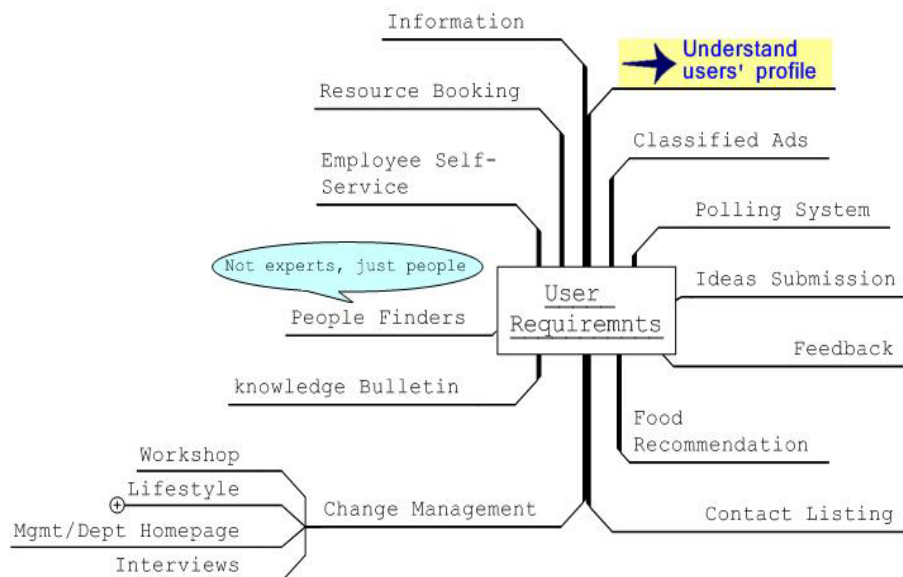


Image 10: Random user requirements

## Step 2: Making sense of input

Using business maps, teams can take this kind of unstructured, divergent information, then drag and drop the requirements into a sorted, categorized and prioritized map of all the things that stakeholders want. The now-organized map provides a concise, readily understood way for the team to begin thinking about how it will meet those needs. It can also be used to reflect those requirements back to users, make necessary modifications, then integrate the requirements into the project plan.

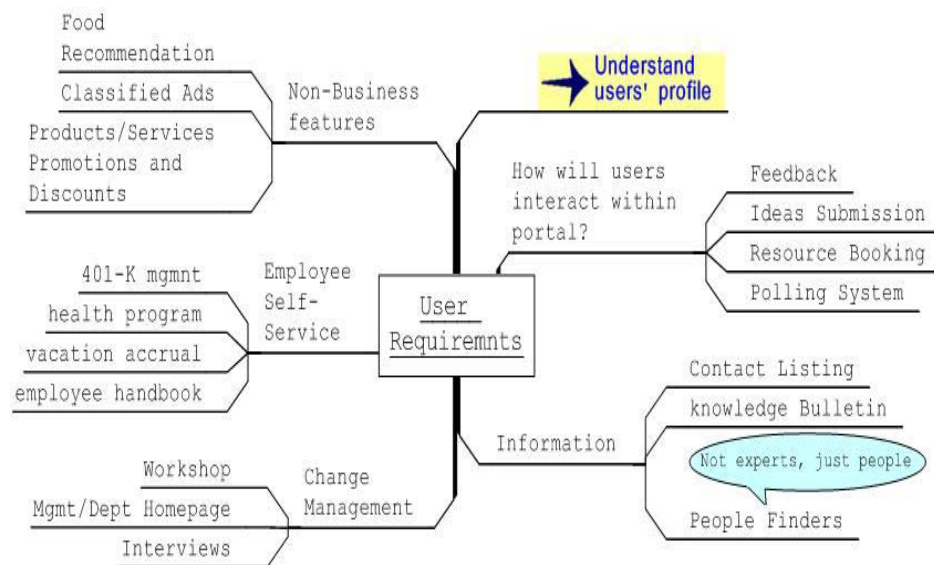


Image 11: Random requirements now organized

## Step 3: Reaching conclusions, making decisions

Successful project teams are those that can maintain both a broad overview and an immediate access to details. Most project management software enables users to maintain a high degree of control over the most minute project details. Such interfaces, however, often obscure the high-level project view—as well as being virtually unintelligible to those not trained to use project management software.

By simply opening or closing subtopics, business map users can either step back and see the project as a whole or access greater levels of detail. Using business maps, viewers can control how much project information they or their intended audience sees. This ability to toggle between views enables teams to keep a firm grasp on the contour and direction of the project, and helps them make good decisions throughout the project life cycle.

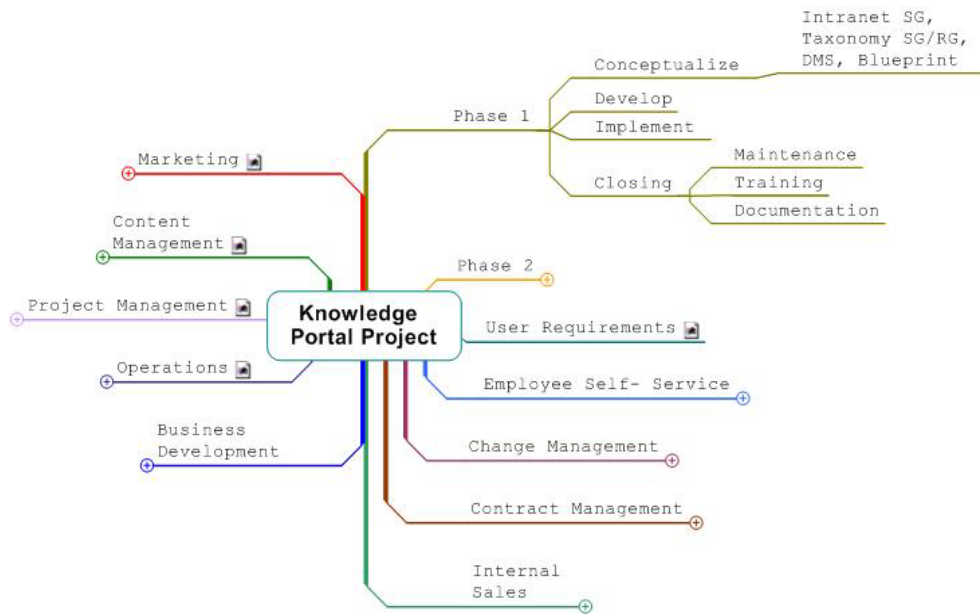


Image 12: Project map; one branch exploded

## Step 4: Communicating decisions

In addition to exporting project planning details to Microsoft Project, MPX-based project management tools or XML-based applications, business maps provide a singularly useful feature: the ability to nest maps within maps. Advanced users at the management level often build a master map that presents a high-level view of multiple projects under their control. Each main branch links to the nested map for that particular project.

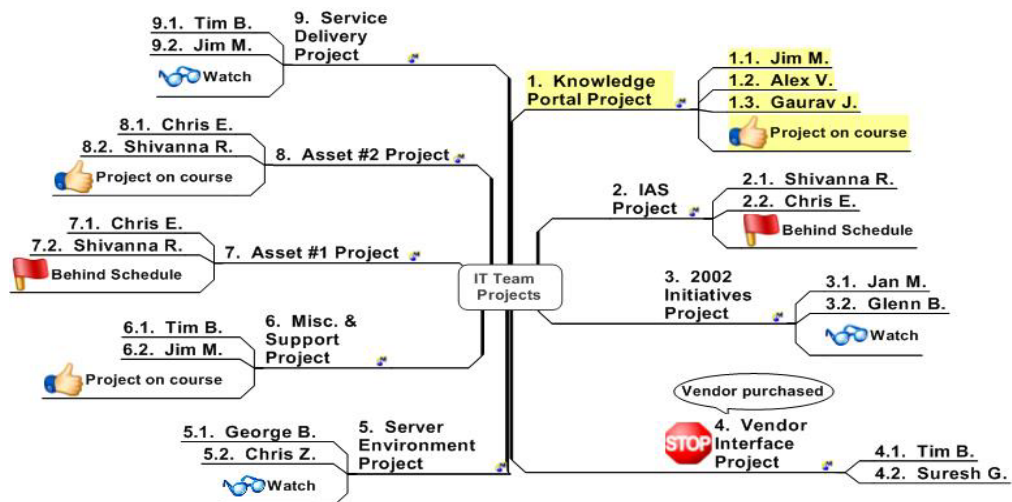


Image 13: Master map of multiple projects

The master map enables the manager to quickly communicate the broad overview of his department's activities. If there is a question about any particular detail, the manager simply double-clicks on the link and drills down into the appropriate project map.

***“Within IT we have four main areas: collaborative technologies, R&D data systems, operations and infrastructure, and enterprise projects/enterprise support. Each of these areas overlaps the others. By building a map of all the projects we’re doing in each area, I get a clear picture of how we can share resources and expertise across the projects.”***

Linda Manuel, IT director, Genencor

## Step 5: Implementing decisions

**Managing Change:** Change is one of the few constants throughout the project life cycle. Business maps help project teams keep their bearings amid change. They do so first by means of a flexible drag-and-drop interface that lets the team quickly modify elements, realigning the project structure to meet new external conditions. They also create a clear trail of such changes, containing everything from the email thread behind a change request to the team’s brainstorming about how to implement that change, as well as documents associated with the change. If, days, months or years later, inquiring minds want to know why and how the change was made, it’s all there in the map.

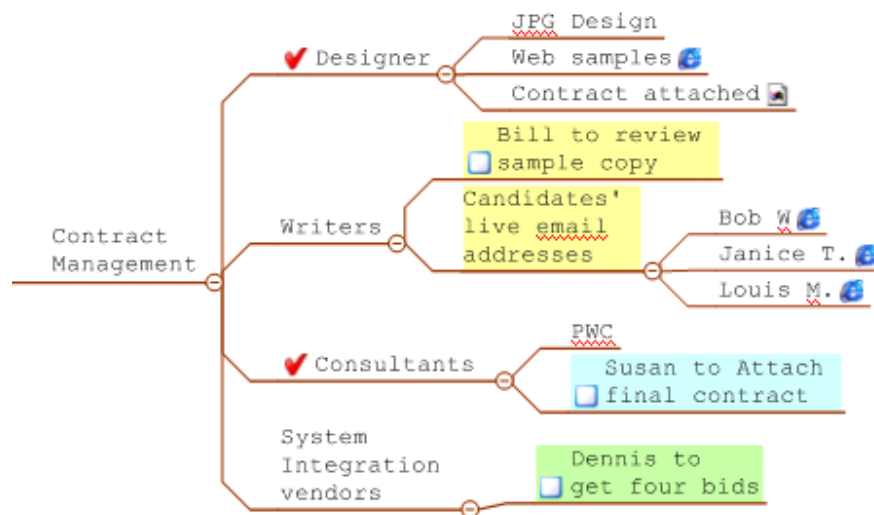


Image 14: Project team adds content and tasks to agenda

The maps help implement decisions by enabling team members to assign task planning attributes to assignments. The project manager can ask each team member to keep his or her progress on tasks updated in the map. At each meeting, the project map can be filtered to reveal all of the tasks assigned to each person. The team can thus quickly make sure that all tasks are on track for completion. Attributes and dependencies are recognized by Microsoft Project and other MPX-based project management tools. Users can design XML schema in order to repurpose this planning data in other applications.

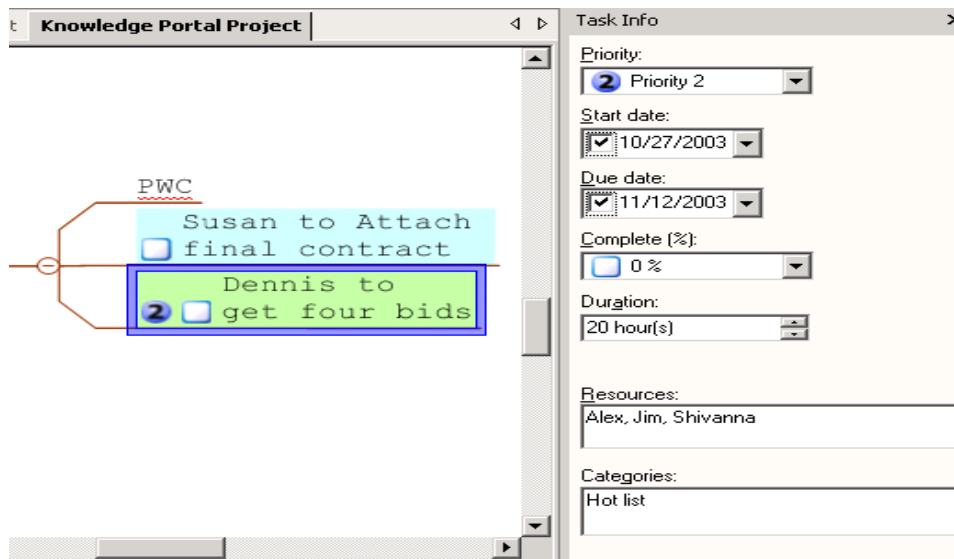


Image 15: Task planning window

**Creating project repositories:** It is often critical during project wrap-up to review what changes were made to the original plan, who initiated them, and how they were implemented. Business maps improve productivity by providing a central project organizing document, a window into the project that can contain everything, from the email requesting a major change and the name of the person authorizing it to a link to the initial project budget—not to a copy of the budget, but to the actual budget itself on your network.

The more project teams use business maps, the more they are able to access and leverage the valuable experience, insights, and ideas represented by all stakeholders. Maps enable the team to stay organized and focused. Project meetings will be more efficient. And the team will find it easier to keep stakeholders informed and in consensus.

### III. Sales Opportunity Analysis

The general methodology of mapping meeting content also improves the process of conducting real-time strategy on sales opportunities. Many sales organizations manage sales opportunities with the help of a database and front end such as customer relationship management (CRM) software. CRM tools are good at taking selected information out of the database and making it understandable to users. But they don't allow individuals or teams to interact with that information in an easy or meaningful way. In particular, CRM tools don't help sales teams get the most current information on sales opportunities. Business maps offer a distinct advantage over CRM interfaces, improving a salesperson's ability to successfully close sales. Using the same criteria as with meeting management, let's look at how mapping improves the sales process.

#### Step 1: Gathering input

**CRM data:** The most basic input needed to advance a sales opportunity is the data stored in a CRM tool. But these tools usually capture information in a series of screens, boxes or tabs—often making it hard for users to understand how one piece of information relates to another.

Accounts		Widget	Count
Account:	Widget Builders, Inc.	Main:	(415) 555-1234
Division:	Consumer Div.	Fax:	(415) 555-3344
Address:	123 Main Street	Toll Free:	
City:	Larkspur	Misc.:	
Postal:	94939	Web URL:	www.widgetsRus.com
State:	CA	Region:	Northwest
Type:	EU-F500	Owner:	Everyone
Status:	Prospect	Acct. Mgr.:	Roy, Anthony
Acct Num.:		Industry:	
SIC Code:		Employees:	
Account Potential:	A - Key Potential	Is this account a Partner/Reseller:	No
Accounts' Resellers:			

Contact Name	Primary	Phone	Title	City	State	Type	Department
Joe, John		(415) 555-1234	President	Larkspur	CA	Champion	
Smith, Tim		(415) 555-1293	CEO	Larkspur	CA		
Robert, Anthony		(415) 555-1146	Regional Sales Man.	Larkspur	CA	Decision Maker	
Iones, Earl		(415) 555-1295	IT Director	Larkspur	CA	Gatekeeper	

Image 16: Screen shot of CRM tool

Business maps bring all information into one screen and enable the user to see how each piece of information relates to the whole opportunity.

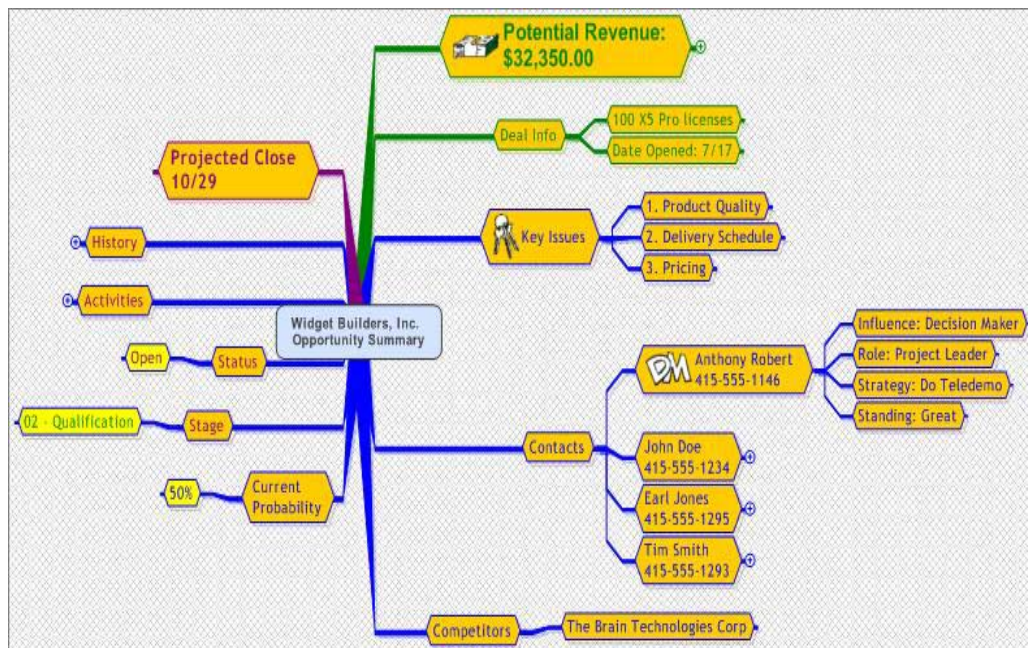


Image 17: The same data presented in map

**By placing various elements into one clear visual context, the map helps users gain insight into information, transforming it from CRM data into knowledge.**

**External data:** XML technology enables users to bring up-to-date and accurate information on a sales opportunity directly into a map without opening other programs or launching a browser. MindManager X5 Pro enables RSS links to news organizations such as CNET, CNN, NASA News and Wired. Companies can create XML schema to connect maps to an infinite number of resource, from news services such as Nexis and Factiva to online corporate research and analysis tools such as Hoovers or Bloomberg.

An increasing number of customers are also creating their own RSS news feeds. When they do, sales teams can configure their maps to have opportunity maps updated with the most recent client information each time the team opens the map. Prior to each customer contact, the salesperson will be equipped with the latest information on that opportunity.

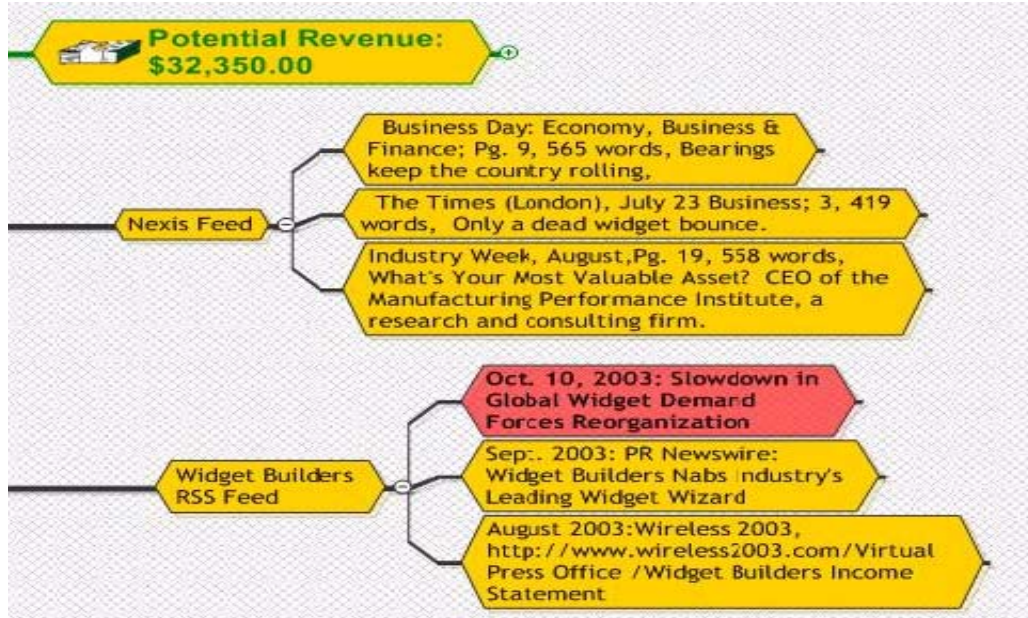


Image 18: RSS feeds give sales team latest information on opportunity

## Step 2: Making sense of input

When CRM data is displayed as a map, individual users or teams are now able to interact with that information, gaining an important overview of the opportunity and critical external information that will help them think strategically about how to secure the sale.

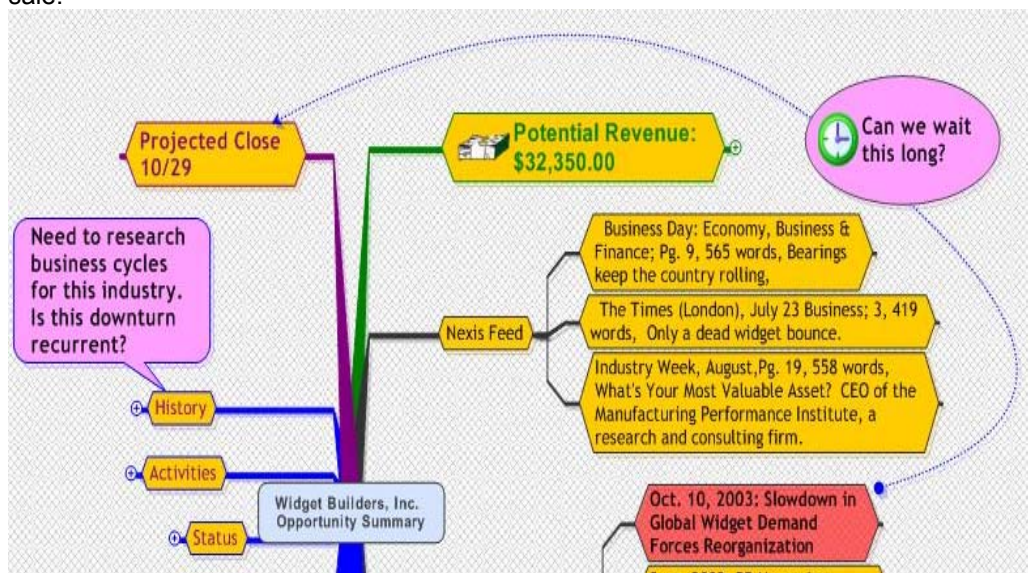


Image 19: Strategic planning notes, warnings, and icons added

### Step 3: Reaching conclusions, making decisions

Now able to view all relevant—and current—information on the sales opportunity, the team is ready to begin brainstorming ways to win the sale, then making plans to implement those ideas.

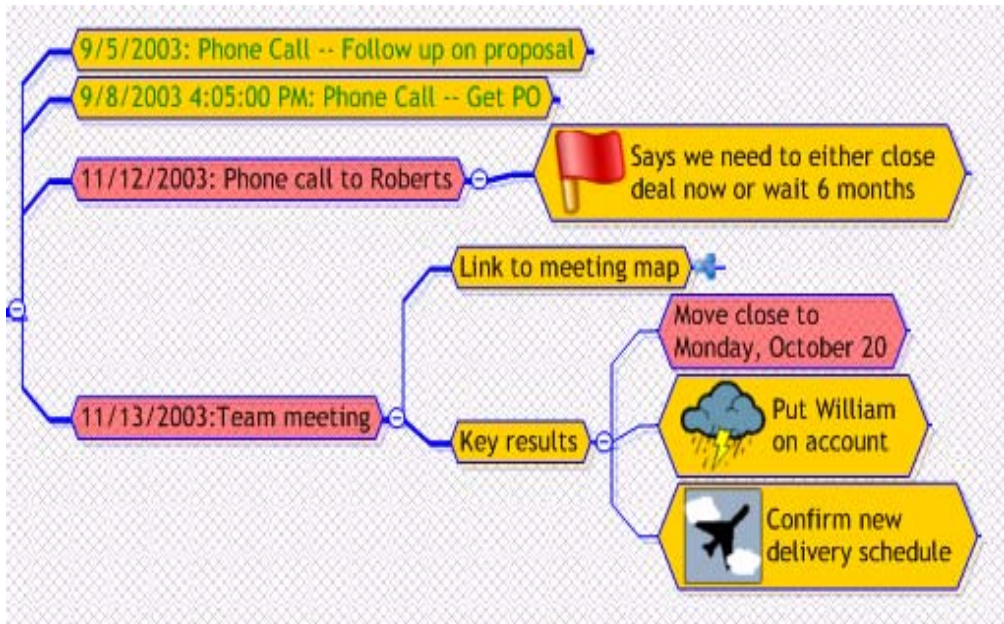


Image 20: Capturing strategy in the map

### Step 4: Communicating decisions

As described earlier, the sales strategy that emerges from the mapping session can be shared with other stakeholders via Microsoft Office applications, XML-based knowledge repositories or Web pages. Increasingly, companies are using the maps themselves to communicate to stakeholders. As noted above, the maps resolve the problem of “more information to analyze and less time to analyze it” by creating visual documents that are concise and easy to understand. A sales manager could export strategy as a report or slide presentation. But when suggestions or requests for changes arise, it is much easier to accommodate input when working in the map format—not to mention that the map form is simply easier for all parties involved to understand.

As also noted above, each strategy map becomes a valuable piece of documentation of the sales team’s contact with that account. In each map, the team can see what decisions it made at any given point, why the decisions were made, and how they were implemented.

### Step 5: Implementing decisions

Business maps are the one application you can use to view a sales opportunity, strategize on that opportunity, document your strategy, and share that strategy with others—while simultaneously creating a history of activities surrounding that opportunity. Whatever format the team chooses for actually sharing its insights and strategies, whether it communicates to outside parties via the map interface or chooses to use it in the background as an organizing tool, the maps provide an intuitive way for team members to capture the work they do together.

## IV. Conclusion

Business maps help executives, managers and teams solve the “and” dilemma: How, in an era of increased information flow, increased competition, increased expectations *and* less time, can people not just get their work done, but do it in a more collaborative, creative, efficient way?

In the case of knowledge workers, there are a great many increasingly complex applications on the market designed to facilitate collaboration and information management. Business mapping technology is one of the few tools that provides, in one easy-to-use application, a way for teams to come together, gather input and interact with information, make sense of that content, come to decisions, communicate those decisions to a diverse audience, and then put those decisions into action.

The use of business mapping to facilitate the meeting process has significant, documented return on investment benefits, including:

- More efficient meetings
- Improved strategic planning
- Better view of complex information and processes
- Sounder decision making
- Improved project success
- More team participation and enthusiasm

The leading business mapping software, Mindjet MindManager, has for years delivered often startling increases in productivity, enabling business users to brainstorm and then implement new ideas and plan in a flexible environment, then share decisions and actions using a host of other applications. By aligning our new X5 software with new XML technology, Mindjet opens a door that will enable users to quickly capture, organize, search and repurpose these same ideas, insights and information with any XML-enabled system, knowledge base or database.

Business is all about meetings. And meetings are all about coming together to find creative solutions to business challenges. Business maps enable users to pull together in one flexible, highly efficient visual interface the information that resides in multiple locations, applications and formats. With their radial interfaces and visual vocabularies, the maps support the kind of divergent/convergent thinking that helps business teams think more quickly and thoroughly about business initiatives. Success these days depends on a company's ability to access, organize, share and repurpose this valuable intellectual capital. Business mapping is the perfect tool to attain that success.

***“Mapping has really helped boost creativity at Con Edison because it allows people to quickly capture and understand complex processes. Being able to actually see these processes displayed in a nontechnical format has made this kind of ad hoc collaboration not just easy to implement, but actually fun and empowering.”***

Al Homyk, general manager, Operations Services,  
Consolidated Edison of New York  
Bronx/Westchester Electric Operations Department

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