Dos and Don'ts of Collaborative Meetings:

How to Prepare, Collaborate and Act on

Data with TIBCO Spotfire

- Spotfire connects easily to enterprise data stores so business analysts can drag and drop in spreadsheets, files and databases to mash-up local data with corporate data.

- Filtering is the basis of Spotfire and allows you to ask what-if questions and run through thousands of scenarios/analyses in a few seconds.

- Automated calculations allow you to create new data without going back and forth between Excel and Spotfire.

- Bin creation makes it very simple and flexible to use group data together and check data distribution.

- Tags provide a good start for an interactive customization and adjustment of the target list.

- Detailed visualizations offer quick insight into a specific group that needs to be explored in great detail.

- Collaborative bookmarks enable meeting facilitators to easily capture all the settings of a particular dashboard and quickly share them with distributed team members.

The unproductive planning session: we've all participated in them and left with a sense of frustration that questions remain unanswered and issues unresolved. Not to mention that the typical communication tools – static PowerPoint presentations and reports – do not engage participants, nor can they respond to questions that arise during the meeting. Instead of leaving with an action plan, "I'll have to get back to you on that" is often the take-away, along with a lack of consensus.

Recently, progressive companies have begun to conduct their business reviews, strategy meetings and planning sessions in a much more productive way - using dynamic data visualizations to facilitate collaboration among participants and yield actionable results signed off by all stakeholders. So how are they doing it?

In this paper you'll discover how your organization can leverage the TIBCO Spotfire® platform to make meetings and planning workshops more collaborative and productive:

1. **Prepare:** organize meeting information based on the most relevant data points

2. **Collaborate:**

   - Foster a collaborative atmosphere and sense-of-team

   - Ask and answer questions on-the-fly

3. **Act**: achieve consensus through clarity and strength of arguments -- based on actual data

Moreover, you'll learn the dos and don'ts of collaborative sessions based on the experiences of Spotfire customers interviewed for this paper.

Preparation is Key

A common theme among collaborative organizations involves adequate data preparation. One Spotfire customer, a global pharmaceutical company, conducts regional interactive workshops to assist local sales teams with customer target planning. While the workshop itself is a one-day session, a regional analytics team goes to the location two days prior to begin preparing data and visualizations for the workshop with the local operations team.

The first day is spent on discovery, meeting with the operational manager and local analyst to get a good feel for assumptions about the data. On the second day the data is aggregated and scenarios using Spotfire visualizations are created, which helps to tee up certain questions and hypotheses to explore in the meeting. "It's really important to have done this work in advance to make the workshop as dynamic as possible," says the analytics team leader. "The operations team needs to be ready to answer any kind of question."

Collaborate and Act on the Analyses

Whether you're facilitating a budget meeting, a sales planning workshop, or an executive session, using Spotfire as the core presentation platform greatly changes the dynamic of the meeting – as well as the outcome. Spotfire offers flexibility, so you can "play" with different scenarios, regardless of data constraints. Compare as many scenarios as you want, to view the impact immediately and better assess the value of each. Because Spotfire's visualizations are multi-dimensional representations, it's easy to point out trends and outliers – whether to clearly highlight a known point or to spot unanticipated patterns.

Maximum meeting interaction is almost a given. Questions are encouraged and no one leaves the meeting having heard "I'll have to get back to you on that" one too many times. Data tables with created columns can be exported on the spot, for a direct implementation of your work. Decisions are made in the room, with a true sense of consensus. "The Spotfire collaborative meeting format has been very well received by meeting participants -- executives and implementers alike," says a LeanSixSigma Black Belt at a large European telecom service provider.

Capturing and sharing the precise moment of insight can be a powerful way to bring together disparate viewpoints. The collaborative bookmark feature in Spotfire enables meeting facilitators to easily capture all the settings of a particular dashboard and quickly share them with distributed team members so that a collective decision can be made efficiently – and without having to email spreadsheets around to justify one viewpoint over another.

Executive Sessions

In preparation for a collaborative session involving the company's senior executives, it is best to use one data source as the corporate standard -- preferably a database that's available to all, where input has been provided before the session. This data source serves as the "sole truth," as one meeting facilitator in the oil and gas exploration industry expressed it. In addition to the meeting facilitator and an experienced Spotfire user, this organization prefers to have only executives in the session freely asking questions, not analysts with their own spreadsheets arguing about data quality. This will keep the meeting on track and the focus on the overall business good.

Use agreed-upon KPIs and review each department the same way. Take advantage of a variety of data visualization types. Plots such as bar charts and line charts help to analyze and convey trends, while visualizations such as scatterplots, tree maps and clustering plots help to uncover buried trends. Time allocation: use the first 20% of the session for the presentation, 30% to ask and answer questions, allowing all participants to raise their issues, 10% to determine obvious "ins" and "outs" and the remaining time to eliminate "outs," to review the conclusions and to make firm decisions.

Tactical Planning and Exploratory Sessions

The Spotfire platform is also being used to great effect for tactical planning meetings and exploratory sessions. Professional subject-matter experts discuss data among themselves to gain new ideas and insights. Spotfire visualizations serve as the basis for discussion, with scenarios and assumptions created on the fly. Concrete data is yielded and the results can be sent to functional managers using the Spotfire Web Player for action and in case they want to perform additional analysis.

Some companies use the Spotfire platform for exploratory sessions where all participants know the platform well. These sessions carry little risk, no politics and are inherently "give-and-take." The end result is that all participants get actions, learn from each other's insights and follow up with the data themselves.

Dos and Don'ts of Collaborative Meetings

Do

- Preparation is key. Scope the issue and define the basic question(s) to be resolved. More time spent preparing the data and the flow of the visualizations will help make the meeting dynamic, interactive and focused.

- Develop basic Spotfire visualizations and organize filters. Use tagging to determine "in" and "out" points, maybe with multiple scenarios (multiple tagging collections). Use collaborative bookmarks wherever possible to ensure all team members are seeing the latest information.

- Define shared success of the session (what is the desired outcome?).

- Define meeting functions. Spotfire customers indicate that defining roles of attendees helps the meeting flow and end on-schedule. Roles typically include: meeting facilitator to manage time and make sure decisions are made, experienced Spotfire "driver", note taker and subject matter experts.

- Agree on what to do with discoveries made during the meeting that are not related to the pre-identified issue.

- Use easy-to-understand charts. Not all participants will be data experts.

- Make wrap-up of conclusions and define next steps.

Don't

- Skimp on preparation. The success of the meeting depends on defining the basic question(s) to be resolved, so that expectations are aligned.

- Let participants put their own agendas ahead of best overall result.

- Include deep-technical analysts in executive sessions. It's better to have dedicated sessions for each group as they have different focuses.

- Let the session go on too long. Shorter, more frequent sessions are more productive.

- Let the meeting digress into analysis only, without a decision being reached. Especially in the executive meeting – the focus should be on quick decision making!

Summary

By meeting collaboratively using an interactive platform such as Spotfire, valuable group time is spent more productively and the process of getting to business answers is accelerated. All of the organizations we spoke with for this paper agree that participants in Spotfire-based collaborative meetings make better and more-informed decisions than with static PowerPoint presentation-based sessions.

With a collaborative approach supported by data-based arguments and challenged by what-if scenarios, consensus can be achieved to tackle even your most challenging business decisions.

TIBCO®

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TIBCO Spotfire
TIBCO Software Inc.
212 Elm Street
Somerville, MA 02144

Tel: +1 617 702 1600
Toll Free: +1 800 245 4211
Fax: +1 617 702 1700
http://spotfire.tibco.com