



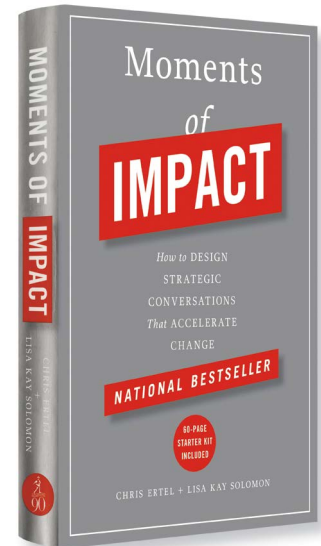
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Moments of Impact

How to Design Strategic Conversations That Accelerate Change



by Chris Ertel and
Lisa Kay Solomon

THE SUMMARY IN BRIEF

In our fast-changing world, leaders are increasingly confronted by messy, multifaceted challenges that require collaboration to resolve. But the standard methods for tackling these challenges — meetings packed with data-drenched presentations or brainstorming sessions that circle back to nowhere — just don't deliver.

Great strategic conversations generate breakthrough insights by combining the best ideas of people with different backgrounds and perspectives. In *Moments of Impact*, authors Chris Ertel and Lisa Kay Simmons “crack the code” on what it takes to design creative, collaborative problem-solving sessions that soar rather than sink.

Drawing on decades of experience as innovation strategists — and supported by cutting edge social science research, dozens of real-life examples and interviews with over 100 thought leaders, executives and fellow practitioners — the authors unveil a simple, creative process that leaders and their teams can use to unlock solutions to their most vexing issues.

IN THIS SUMMARY, YOU WILL LEARN:

- The key differences between meetings and strategic conversations.
- The five core principles for designing strategic conversations.
- How to effectively confront resistance, or the “yabbutts,” in your organization.
- Things that strong strategic thinkers do habitually.

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THE COMPLETE SUMMARY: MOMENTS OF IMPACT

by Chris Ertel and Lisa Kay Solomon

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Introduction

Faced with a tough challenge that calls for collaboration — such as increasing competitive pressures or a shift in business models — most leaders will reach for one of two well-worn devices: the standard meeting or the brainstorming session. While both are fine for many situations, neither is sufficient for dealing with messy, open-ended challenges.

There has to be another option — and, thankfully, there is. Strategic conversations are the third way. A strategic conversation doesn't feel like a regular meeting or brainstorming session. It is its own distinct type: an interactive strategic problem-solving session that engages participants not just analytically but creatively and emotionally. The defining features are that the stakes are high, the answers unclear, and the participants are expected to create real insights together — rather than play out prepared scripts — across organizational boundaries.

Adaptive Challenges Call for Adaptive Leadership

Ronald Heifetz, a leadership teacher at Harvard Kennedy School, draws a critical distinction between technical and adaptive challenges. *Technical challenges* involve applying well-honed skills to well-defined problems — such as building a bridge or organizing a production line. Technical challenges may be complex, but they can still be resolved within well-understood boundaries. In these situations, more traditional, hierarchical approaches to leadership work well.

Adaptive challenges, by contrast, are messy, open-ended and ill defined. In many cases, it's hard to say what the right question is — let alone the answer. Many of the most important strategic challenges that organizations wrestle with today are adaptive challenges. Navigating and solving adaptive challenges demands a different set of leadership muscles — such as asking penetrating questions, winning the full engagement of colleagues, and connecting insights from different sources in real time.

Leaders face a world-class dilemma: They need to make good strategic choices under uncertainty while engaging more people with different perspectives more effectively in the process — and do it all faster, too. To do this well, we've got to put the people back into strategy — in a much smarter way. Today, more than ever, strategy is the conversation. ●

Designing a Strategic Conversation

You probably already know how to run a pretty good meeting. You know that you need clear *objectives* that are reasonable given the time you have. That you should invite *participants* who can help meet those objectives. That your *content* — presentations and reports — should lay out the issues clearly. That the *venue* should be the right size for your group and contain the necessary equipment and supplies. That your *agenda* should end with next steps, roles and responsibilities.

This basic model works well for the vast majority of meetings: routine check-ins, formal board meetings,



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planning sessions and the like. But not when it's time to have an important conversation about critical yet ambiguous issues. That's when you need a more powerful tool. It's critical to recognize early on when you are facing an adaptive challenge, call this out explicitly, and start designing your session as a strategic conversation.

The Five Core Principles of a Well-Designed Strategic Conversation

Designing an effective strategic conversation requires that you cover all the basics of a well-organized meeting — and a good deal more.

Designing a strategic conversation means creating a shared experience where the most pressing strategic issues facing an organization are openly explored from a variety of angles. An experience where all the assumptions that make up your mental maps about how the world works — and how it is changing — are examined. An experience where new stories about your future success are explored, tested and refined. An experience that engages a group in a deeper level of discussion than they thought possible.

The five core principles below are the main components of our process for designing strategic conversations.

Core Principle 1: Declare the Objectives → Define the Purpose

A well-organized meeting requires that ... you start with a clear set of objectives and desired outcomes that make sense and are realistic given the time available. A well-designed strategic conversation also requires that ... you develop a clear sense of the change that this group of people needs to make together — and how this conversation will advance that process.

Core Principle 2: Identify Participants → Engage Multiple Perspectives

A well-organized meeting requires that ... you identify the most appropriate participants for a given session and prepare them well in advance. A well-designed strategic conversation also requires that ... you dig deeper to understand the views, values and concerns of each participant and stakeholder group. Ultimately, it requires that you find ways to create value from the intersection of diverse perspectives, experiences and expertise that live inside any organization.

Core Principle 3: Assemble Content → Frame the Issues

A well-organized meeting requires that ... all content be highly relevant to the objectives and clearly communicated. A well-designed strategic conversation also requires that ... the content and issues are framed in a way that illuminates

different aspects of the adaptive challenge you're wrestling with, including how the various parts relate to the whole. A good frame helps make insights “stick” and thus accelerates progress on tough issues.

Core Principle 4: Find a Venue → Set the Scene

A well-organized meeting requires that ... you find an appropriate venue given the size of your group and the nature of the meeting. A well-designed strategic conversation also requires that ... you make thoughtful choices about all elements of the environment — from the physical space to artifacts to aesthetics. Like a great theater production, all the parts should come together in a seamless and integrated way.

Core Principle 5: Set the Agenda → Make It An Experience

A well-organized meeting requires that ... you follow a logical sequence of agenda items, typically starting with some form of orientation and ending with next steps. A well-designed strategic conversation also requires that you attend to the emotional and psychological experience of participants. A great strategic conversation is not just an intellectual exercise — it's an exhilarating and memorable experience. ●

Define Your Purpose

Imagine that your organization is facing a thorny adaptive challenge. Maybe an aggressive new competitor is stealing your market share, or an attractive but complicated growth opportunity is opening up.

Once an organization recognizes that it's facing an adaptive challenge, it typically sets out on a winding road of exploration, discussion and action that eventually leads to decisions and results. It comprises many different interactions and touch points that unfurl over time, including informal discussions, intensive research, formal review meetings, working-team sessions and — most important — strategic conversations.

This kind of creative problem solving follows an arc of divergence and convergence. You start by taking a broad perspective on a challenge, then gradually shift into identifying and winnowing down possible solutions over time.

Key Practice 1: Seize Your Moment

Strategic conversations are pivotal, synthesizing moments within this larger process. They enable a group to achieve new levels of clarity and coherence about their adaptive challenge — and help move leadership teams toward deeper levels of shared commitment and understanding. While an adaptive challenge rarely gets “solved” in

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any one conversation, a well-designed session can release tremendous energy and create forward momentum. These moments of impact propel a group forward, often opening new avenues of insight and alignment along the way.

Key Practice 2: Pick One Purpose

Strategic conversations have just three overarching purposes: Building Understanding, Shaping Choices or Making Decisions. Any strategic conversation you can imagine will sort into one of these categories. A well-designed strategic conversation must focus on one — and only one — of these three types. If your group doesn't know much about the issues — or has sharply divergent opinions on them — you need to run a Building Understanding session. If they have tons of knowledge but are spinning their wheels on what to do, it's time for a Shaping Choices session. Only when you've done both of these jobs well should you consider calling a Making Decisions session.

Key Practice 3: Go Slow To Go Fast

An important part of running any good meeting or strategic conversation is getting to a clear list of next steps. When approaching a strategic conversation, it's common for participants to push for agendas that drive faster toward agreement and decision making than is realistic. That's a problem because people need time and space to process together the complexity of adaptive challenges. Groups that make the effort to get to a true moment of impact — that is, some deep alignment on important insights — recognize this as progress. After they reach this point, they can usually start taking action — fast.

If you leave a strategic conversation without consensus, no list of next steps — no matter how “action oriented” — is likely to help. By contrast, when your group walks out of the room with genuine agreement around some important new clarity, you can always sort out next steps later. ●

Engage Multiple Perspectives

Adaptive challenges require leaps of insight that usually only come from combining ideas from different places in new ways. Anywhere people are generating new ideas at a standout clip, you'll find a rich ecosystem of diverse perspectives coming together.

Great strategic conversations do this, too. They capture some of the magic of the coffeehouse, the scientific lab, and the after-hours bar where great cooks or musicians

or entrepreneurs swap their latest ideas. To get some of this magic working for you, you have to do at least three critical things: bring together the right perspectives, create a common platform for collaboration, and carefully lean into the most important differences of opinion in a way that sets off a “controlled burn” of contained and productive conflict.

Key Practice 1: Assemble a Dream Team

Getting the best possible group into the room is key to a successful strategic conversation. Yet, most project teams are both too inclusive and not inclusive enough. While they fill the list with people they feel obliged to include, they end up excluding — or don't even think of — other people who could be a huge help. From the extensive research on creative collaboration, three findings are especially relevant to pulling together a dream team for your next strategic conversation:

1. Good ideas often come from bridging the gaps between people and groups with different areas of expertise. In the lingo of social network theory, most people live in dense “small worlds” of social connection that are separated by gaps or “structural holes.” People who can bridge these gaps create valuable connections between people and ideas.
2. Novel solutions to stubborn problems often come from outsiders and nonexperts. The history of innovation is full of stories about outsiders who discovered breakthroughs that took experts by surprise.
3. The most productive groups are often those with moderate levels of familiarity. If a group works together on one project after another, they can get stuck in habits and routines that aren't conducive to creative insight.

Key Practice 2: Create a Common Platform

Once you've got the right perspectives lined up for a session, you need to start building a *common platform* for creative collaboration. This is an important task because strategic conversations can sometimes raise uncomfortable uncertainties, create status anxiety, carry real potential for loss, and raise the possibility of conflict. A critical part of your job is to find ways to offset and manage these stresses.

Eight key “planks” that make up a strong common platform for strategic conversation include having a sense of shared purpose and objectives, a sense of group identity and community, a common understanding of the challenges, a sense of urgency, a shared language system or

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common definition of key terms, a shared base of information to drawn upon, the capacity to discuss tough issues, and common frames through which to see the issues.

Key Practice 3: Ignite a Controlled Burn

Once you've got a diverse group standing on a common platform, it's time to start mixing it up. We like to think of talking about challenging topics as setting off a "controlled burn" — similar to the kind that firefighters create to protect and nurture forest ecosystems. Below are eight different ways to get a group to talk about combustible topics while keeping a bit of distance from the heat that they throw off:

- Take a longer time perspective on the issues.
- Take an "outside-in" perspective, focusing on external drivers of change.
- Turn the challenge into a game or simulation.
- Focus the discussion on key assumptions, not conclusions.
- Have people walk in the shoes of others.
- Make the group grapple with tough trade-offs.
- Agree on neutral criteria for making choices.
- Set and maintain clear boundaries and ground rules. ●

Frame the Issues

To make progress on adaptive challenges, you as the strategic conversation designer need to do more than just gather all the relevant data for participants. You need to make smart choices about where and how to direct their attention within this mass of complex and often conflicting signals.

As the word suggests, a *frame* is a strong focusing device — a set of operating instructions for the mind. Good frames for strategic conversations turn your attention to what matters most while lighting up your peripheral vision at the same time. As a strategic conversation designer, an important part of your job is to frame (and reframe) the issues in a way that directs the attention of your group in productive ways. Here are a few key practices that can help you enable your group to arrive at shared insights more quickly and effectively.

Key Practice 1: Stretch (Don't Break) Mindsets

Your participants will surely bring their own frames — often implicit, unstated ones — with them to your session. When creating any frame for a strategic conversation, you need to keep one eye on the content and one eye on the perspectives of your participants. This means

working hard to understand these perspectives before developing alternative frames. It also means testing your frames with a few key people ahead of time to make sure they resonate. When you create frames that stretch — not oppose — participants' mindsets, they have a good chance of becoming "sticky," laying a strong foundation for strategic conversation.

Key Practice 2: Think Inside *Different* Boxes

Groups facing adaptive challenges are often exhorted to "think outside the box" — an overused cliché that doesn't provide instructive guidance. To get to creative solutions, you need to help your group approach their familiar challenges from a number of angles and lenses. You need to help them think inside boxes that are different from the ones they're used to. Options include scenario planning, simulations and role-playing activities, such as taking on the personas of specific customers to find and solve problems from their point of view.

Key Practice 3: Choose a Few Key Frames

Most strategic conversations are built around a small number of key frames, usually three or fewer. In choosing these frames, your main goals are to focus attention in the right places and to ensure that group members are solving the same puzzle together at the same time. Frames can take many forms, including questions, catchphrases and metaphors, visual frameworks and stories.

For example, framing a focal question is one form. Pollsters have known for ages that the way that you frame a question can have a major impact on the answers you get. This observation also applies to strategic conversations, where a well-framed question can be one of your most powerful tools. At other times, a meme can become a framing concept, a catchphrase that acts as shorthand for a more complicated idea or argument. With visual frameworks, a simple visual image is one of the best ways to help a group see the same thing at the same time.

Finally, a critical form is the *output frame*, a bridge between what happens in a session and what needs to happen next. Creating a "sticky story" can be an especially effective way to ensure the insights of a session live on in an organization. Stories are natural translation tools: They tell what happened in a way that engages our imagination and makes us want to learn more.

When designing your next strategic conversation, you'll want to spend serious time thinking in advance about both your *input* frames — how you are setting up the problem and content of the session — and the kind of *output* frames you hope to leave with. As your frames

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get smarter and more evolved, so should the choices and actions your group makes as a result. ●

Set the Scene

Most people, when charged with finding a meeting venue, will ask, “Where’s a place that has everything we need?” Black-belt (expert) designers of strategic conversations ask instead, “Where and how can we create the best environment to support our purpose?” Instead of thinking like a project manager or an event planner, they think like a producer and a host. They fuss over finding the right kind of space — then work hard to make it their own. They bring visual thinking into the program. And they *do* sweat the small stuff — big time.

Key Practice 1: Make Your Space

Scant attention paid to meeting spaces violates not just common sense but reams of research on the ways that space shapes our mood, behavior and productivity. Access to natural light has been found to boost academic performance, workplace productivity, psychological well-being and physical health. The color scheme of a room can impact how people approach problems, with blue walls fostering creativity and red ones raising urgency. Moderate levels of ambient noise inspire higher productivity.

A space doesn’t have to be loaded with extras to support a strategic conversation — it just has to get the basics right. We think of these basics as making up a *shell space*, which can then be customized for a specific purpose and group. A checklist of basic room requirements for strategic conversations includes making sure the room size doesn’t feel cramped or cavernous; that the shape allows everyone to see and be easily seen; that the space works well for both plenary and breakout sessions and includes windows; wall space for hanging materials; comfortable seating and minimal visual distractions.

Key Practice 2: Get Visual

People are natural visual thinkers. Field research shows that vision trumps all other senses when it comes to how humans learn and remember. For a strategic conversation, you have at least six kinds of visuals to think about:

1. **Prepared materials**, such as slides, posters, hand-outs or timelines.
2. **Process templates**: worksheets or templates designed to help guide participants through a series of steps.
3. **Frameworks**: visual models that help structure

conversation and connect individual issues to a larger challenge.

4. **Prototypes**: drawings or other renderings of working-draft ideas and solutions.
5. **Live capture**: Flip charts, graphic recordings, photographs and digital interfaces that capture and curate content in real time.
6. **Emergent sketches**: any visual interface used for real-time exploration and idea building, such as mind-mapping, doodling or a graffiti wall.

Almost every effective strategic conversation features some combination of these elements. The key is to be thoughtful about which ones to use — where, when, why and how.

Key Practice 3: Do Sweat the Small Stuff

Obsessive attention to detail is a hallmark of all great design. Steve Jobs of Apple was renowned for his insistence that all parts of the Apple system — devices, software interfaces and retail experiences — be elegant, integrated and consistent. Designers of strategic conversations are no different. They know that little details matter. So they fret over them, always scanning for opportunities to shrink risk factors and improve participants’ experiences.

One major risk in any session is distraction. Strategic conversations require extended periods of focused conversation — a rarity in our age of hyperactive multitasking. People will often jump at any excuse to shift their attention elsewhere. Black-belt designers are tenacious about hunting down and banishing all sources of distraction. This means making sure that all equipment and supplies are in place; the room temperature is moderate; the furniture is comfortable; nearby noise levels are low; and food will be delivered at a reasonable time and place.

When you get the small stuff right, people notice it — often subconsciously — in a way that increases their engagement and confidence. When you mess it up, people really notice it — in a way that can undermine their trust in you and in the process. ●

Make It An Experience

When planning a strategic conversation’s agenda, your primary goal should be to *create a powerful, shared experience*. This way you can strike the right balance between your content and your people. This focus on experience may sound counterintuitive. Many people think of “experience” as a nice-to-have additional layer — such

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as kicking off a session with a pleasant dinner, finding a great off-site venue, or making sure the meeting materials look pretty. But the experience of a strategic conversation means much more than this. It means looking at the session as a psychological and emotional journey as much as an intellectual one.

Key Practice 1: Discover, Don't Tell

Serious research shows that people have a remarkable cognitive immunity against learning from presentations — even when they want to. Lectures don't work for two reasons: 1) They overload listeners with more information than their brains can handle at one time, and 2) the listeners are passive. By contrast, what does work, in study after study, is *experiential learning* — enabling people to discover key insights and concepts for themselves, with a bit of guidance.

Joe Redish, a physics professor at the University of Maryland, helps students learn Newton's second law of motion by dropping two balls of different weights simultaneously from a second-story window. Intuition tells us that the heavier ball should land first, but Newton's law says that's wrong. When the two balls hit the ground at the same time, Newton's law becomes hard to forget, long after the formula has faded from memory. Lessons learned from vivid experiences such as this are fiendishly hard to unlearn.

Key Practice 2: Engage the Whole Person

Designers have long understood that reason and emotion are interconnected. In his classic book *The Design of Everyday Things*, cognitive psychologist and design theorist Don Norman shows in detail how great designs — of products, buildings or services — engage and delight their users as whole people.

The best strategic conversations are like this, too. They engage your head and gut equally, and you're not asked to make choices between the two. A common assumption is that we should keep our passions out of important meetings, as unchecked emotions can bring out our worst instincts and subject us to all kinds of biases. But a roomful of hyperrational Mr. Spocks can't solve an adaptive challenge.

When designing a strategic conversation, ask, "How can we best engage participants as whole people? How can we tap into their logical *and* emotional selves in a way that leads to smarter choices and action?"

Key Practice 3: Create a Narrative Arc

At first glance, setting the agenda for a strategic conversation is essentially the same as for a standard meeting. In both cases, you need to generate a list of topics and activ-

ities, then sort them into a logical sequence that fits into the allotted time. However, black-belt designers approach their agendas with a different mindset. They think in terms of creating a "narrative arc" — a flow of activities that moves from beginning to end, just like a good story line.

The narrative arc concept comes from the world of drama. A five-part structure — introduction of characters, rising action, climax, falling action and resolution — captures the arc of most plays. But given that strategic conversations are more fluid than a play or a movie — participants have more say in where the story goes — black-belt designers don't follow a set formula in crafting their arcs. Rather, they customize the experience based on an understanding of the specific group of people and the issues they're facing. The next time you approach an agenda for a strategic conversation, try thinking less like an air traffic controller juggling a list of topics and interests — and more like a screenwriter or deejay. ●

Confronting the 'Yabbuts'

Now that you're familiar with how to design strategic conversations, it's time to visit the dark side. By this point, we suspect you've collected a good number of yabbuts in your head. That's the word that innovation-strategy pioneer Larry Keeley uses to describe thoughts like "Yeah, sure this all sounds good — but here's why this would never work in my organization." Most of the time, when a session flops, it's because it fell victim to at least one of three big yabbuts: politics, near-termism, and what we call the karaoke curse.

Yabbut 1: Politics

The phrase *political organization* is redundant; all organizations are political. Every participant at a strategic conversation brings self-interest to the table, even if few of them will talk about it freely. But while there's no such thing as "no politics," there is a continuum that runs from "bad" to "good." Bad politics is about individual self-interest, control over resources and empire building. Good politics, by contrast, involves honest debate about ideas, values and an organization's future direction.

To be sure, there are many shades of gray in between. Most people will enter a strategic conversation with mixed motives. Even "good" politicians must work to gain and retain power in order to be effective. The key is to keep a watchful eye out for common political pitfalls and address them in ways that can steer a strategic conversation away from bad politics and toward the good. Common

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pitfalls include refusing to declare who has decision rights, faking participation, excessive deference, agenda hijacks and others.

Yabbut 2: Near-Termism

In today's rapidly changing environment, all organizations need to balance short-term goals with long-term growth if they want to thrive beyond the next few quarters. Unfortunately, near-termism is hardwired in our brains. One of the best-documented cognitive biases is temporal discounting — that people predictably put higher value on benefits or costs that are in their face now over ones that will come later. Temporal discounting is a big part of the reason we fail to exercise, succumb to tempting foods, “forget” to floss our teeth, neglect to save for retirement, or suffer from disabling addictions.

In the famous Stanford Marshmallow Experiment, researchers found that the ability of children to delay gratification by choosing to take two marshmallows in 20 minutes rather than one marshmallow now had long-term predictive value. In follow-up studies, preschoolers who were able to wait the extra time had greater self-control and success as adults. Organizations could learn a lot from these kids. We need more incentives to offset the powerful effects of temporal discounting — not reinforce it — if we want to thrive for years to come.

Yabbut 3: The Karaoke Curse

Ever been to a karaoke bar? After a couple of drinks, even a midlevel marketing manager might believe he can belt out Sinatra's “My Way” as well as the chairman of the board. After all, it *looks* easy when other people sing well. *Karaoke skills* is our term for areas where people's confidence tends to exceed their competence.

Strategic conversations tend to surface a number of karaoke skills, such as presenting, group facilitation or collaboration skills. But the most important is strategic thinking. Like any serious skill, strategic thinking takes time to master, and you can quickly spot a black belt (or a karaoke performer) when you see one in action. Here's a short list of things that strong strategic thinkers do habitually:

Systems thinking: Construct — and constantly tinker with — mental models about how their business works to solve problems and spot new opportunities.

Scanning and pattern recognition: Perpetually scan for new data points and insights from a wide range of sources — including those beyond their industry.

Challenge own assumptions: Invite other people to challenge their thinking as well as their underlying thought processes.

Balance future and present orientation: Consider the future and the present needs of their business at the same time, without conflict.

Synthesis and storytelling: Take observations and ideas from a wide range of contexts and combine them into coherent stories about future options.

Hypothesis testing: Look for quick-and-dirty experiments to test emerging hypotheses and see what works. ●

Make Your Moment

Strategic conversations counteract the yabbuts. Defining a clear purpose and engaging multiple perspectives help to neutralize bad politics. Giving people a visceral experience of future possibilities keeps near-termism at bay. Framing the issues enables better strategic thinking and more creative solutions. In well-designed strategic conversations, the yabbuts don't disappear. But they get starved of oxygen long enough to get important work done.

That's when you — a budding black-belt designer — can raise your ambition and lean in harder. Because your real goal is not just to neutralize the yabbuts. It's to get people focused on creating a better future with a sense of common purpose in an environment where creativity and collaboration can flourish.

When leaders show the capacity to face an adaptive challenge, they can propel their organization forward in powerful ways. Confidence and optimism become contagious. People spend more of their time thinking about and planning great things they can do next. Designing great strategic conversations is challenging and rewarding work that can also be fun. Most important, it's one way that just one person can have outsize impact on the future of an organization — and beyond.

So go ahead, make *your* moment. And when you do, don't be too surprised to find that you're pushing on an open door. ●

RECOMMENDED READING LIST

If you liked *Moments of Impact*, you'll also like:

1. **No More Pointless Meetings** by Martin Murphy. Murphy reframes the entire concept of collaboration and introduces four “Work Sessions” that replace meetings to get more done faster than ever before.
2. **Just Listen** by Mark Goulston. Goulston reveals the secret of how to get through to anyone, even when productive communication seems impossible.
3. **Stop Workplace Drama** by Marlene Chism. Chism shows how to change the way you and your organization confront and work through problems and implement effective strategies in a drama-filled organization.