DAVE MACLEOD

scaling conversations

HOW LEADERS ACCESS THE FULL POTENTIAL OF PEOPLE

WILEY

Table of Contents

DAVE MACLEOD

Scaling Conversations

HOW LEADERS ACCESS THE FULL POTENTIAL OF PEOPLE

WILEY

Published by John Wiley & Sons, Inc., Hoboken, New Jersey.

Published simultaneously in Canada.

Library of Congress Cataloging-in-Publication Data

Names: Macleod, Dave (Chief executive officers), author.

Title: Scaling conversations : how leaders access the full potential of people / Dave Macleod.

Description: Hoboken, New Jersey : Wiley, [2021] | Includes index.

Identifiers: LCCN 2021008933 (print) | LCCN 2021008934 (ebook) | ISBN 9781119764458 (hardback) | ISBN 9781119764519 (adobe pdf) | ISBN 9781119764502 (epub)

Subjects: LCSH: Business communication. | Conversation.

Classification: LCC HF5718 .M3175 2021 (print) | LCC HF5718 (ebook) | DDC 658.4/5--dc23

LC record available at https://lccn.loc.gov/2021008933

LC ebook record available at https://lccn.loc.gov/2021008934

Cover Art and Design: Paul McCarthy

For and because of my amazing boys Aaron, Liam, and Fynn

THE LIMIT OF OUR COMPETITIVE ADVANTAGE

We humans are uniquely wired for empathy, facial recognition, and language. Our ability to collaborate with one another, beyond our relative groups, is widely recognized as the key ingredient of what has driven so much of our amazing progress as a species. Long ago humans were, fortunately, able to recognize the mutual benefit of our interdependence. Rather than just brutally compete with each other at all times, we took an interest in the well-being of others to improve our own lives. Initially we applied this to feeding ourselves and to simple ways of interacting beyond our family members. Over time, we developed deeper and deeper ways of collaborating more effectively. Again, for our own gain.

As our societies developed, we were pretty successful at collaboration: We embraced our ability to empathize and consider the points of view of others; we leveraged our ability to recognize each other and remember who we had made agreements with; and we refined our language to improve how we created things that mutually benefitted all of us. Soon enough we spread to all corners of the planet and created a global ability to share our feelings and opinions, watch sports and buy things from one another, using screens in our pockets. The language and technology we use to better cooperate with one another continues to evolve to this day as we all keep working to solve problems that threaten our species in small and large ways.

It would be great if we could simply spend a lot of time discovering and celebrating our incredible ability to work

together as a species, but unfortunately, and obviously, we have used those same abilities to divide and polarize.

Along with our favorable wiring, as a species we are also wired in extremely unhelpful ways. Often described as two different “kinds of brain,” along with our ability to learn and be creative, we have parallel survival instincts that hijack our capacity to empathize and communicate effectively. When we perceive a threat, humans react similarly to many other animal groups: We respond by fighting, fleeing or freezing. This happens in both well- and less-understood ways.

On the well-understood side, sometimes relatively simple “threats” can cause two perfectly reasonable adults to be suddenly angry and unable to inhabit the same room. Sometimes, reading an email or social post that seems threatening can destroy an entire relationship. Different views on religion, philosophy and politics can make people so divided they can't even hear one another, never mind collaborate. You can easily think of hundreds of human behaviors that decrease our ability to work well together.

On the less-understood side, unconscious biases can cause people to misinterpret and react poorly to one another based on things they don't clearly realize. Extroverts and introverts require different environments to allow effective communication. Systemic racism has created mechanisms to ensure privileged people have more ability to influence than people with a different skin color. Social media is built to silo people and amplify extreme voices in an echo chamber.

For nearly every communication ability we can point to, as a species, we can also single out a failure to communicate that threatens our organizations, our society and, ultimately, our world. The remedy for this is to continue to improve our ability to share our voice, listen to one another,

and discover common ground and insight to our mutual benefit. Simply, we need to converse better.

Over the years, humans have innovated to overcome our unfavorable wiring and our inability to converse in large groups. To try to ensure we get as much benefit as possible from group conversations we have invented talking sticks, council etiquette, and, in more recent times, *Robert's Rules of Order*—an adaptation of the rules and practice of Congress to address the needs of non-legislative societies published by US Army Officer Henry Martyn Robert in 1876. Many organizations train people in collaborative negotiation, conflict resolution and group meeting facilitation. Recognizing our inability to converse effectively in large groups, leaders in all sectors of society try to add structures to get the best out of groups and avoid the worst behaviors and outcomes.

The problem is that none of these systems scale up.

The talking stick, and its culture of respecting every voice, is probably still the most effective invention but doesn't help a group that can't sit together. Our current attempts at scaling communications digitally, to include many people, give unfair voice to small groups, divide people into silos, and create echo chambers within threads and channels of similarly minded people.

The communication challenges facing our organizations and our society are increasingly urgent and we need to focus on what has always given us an advantage as a species: Our ability to converse. As a leader, you need to improve your ability to lead mutually beneficial interactions in which people feel heard, insights emerge, and trust increases. Our organizations are getting more complex, our population is growing, and therefore our ability to converse effectively needs to scale just as fast, or faster.

I'm currently the CEO of a fast-growing technology company in the conversation space, but I didn't grow up in tech. Quite the opposite. As a young adult living in British Columbia, Canada, I worked for many years in the late 1990s and early 2000s as an experiential educator and an outdoor adventure guide at a place called Educo Adventure School. As a group of young leaders, tasked with carrying the flame of an outdoors school founded in the early 1960s, we did our best to draw out the unique leadership qualities of young people as we climbed ropes and mountains, experienced sweat lodges with Secwepemc leaders and explored group communication through good times and challenges. While the rappelling, climbing, zip-lining and river-paddling provided an exciting platform to bring young people together, the lessons in self-expression and group communication are the lasting aspects of a decade of involvement in experiential education. It had a profound impact on my life and my desired career.

Being an outdoor facilitator is gratifying, and a whole lot of fun, but it is also seasonal and doesn't pay too well. As I reached my mid-twenties, I left the outdoors school world and ventured into creating new year-round businesses focused on human potential.

Fast-forward a few years and I was operating a small leadership development and consulting company focused on event facilitation and workshop development and delivery. I won a contract with a health organization that gave me the audacious and slightly uncomfortable title of Community Development Leader. In this initiative I was tasked broadly with increasing the health of young people in the Cariboo and Chilcotin regions of British Columbia by finding places to invest small amounts of capital which could have a large impact. Key to the success of this initiative was leading conversations to learn what people felt would inspire increased health based on their local

knowledge. This was meant to be a grassroots initiative; in my region it focused both on First Nation communities and small municipalities.

As part of the process of distributing funds I facilitated a number of conversation-based meetings to decide how to do this in the most impactful way. I soon became painfully aware of individuals and organizations with vested interests who dominated agendas with their personal mandates. Academically, I understood interest groups and mandates, but experience is the very best teacher. These people and groups arrived at planning meetings with the pre-established goal of securing additional dollars for their existing projects. To be sure, many others arrived simply to learn, to join the conversation, and try to facilitate a group outcome. Unfortunately, those people were in the minority.

I wanted to involve everyone in a real conversation, and not just provide a platform for the loudest voices. So, I had to innovate.

Along my educational journey as a group facilitator, I came across a game called “35.” It was exactly the tool I needed in this situation. The idea was simple: To learn what a group values, you ask an open question and give everyone a recipe card or sticky note to write down their answer. A common question was: “What is the most important thing we need to talk about today?” Each person wrote their answer down and did not sign their name. The cards were then shuffled around the room by people exchanging them with one another, one at a time, until they were told to stop. Each person then looked at their card and rated the idea out of seven. This shuffling and rating happened five times. At the end of this ordered chaos, I collected the cards and counted backwards from 35 to find the highest-rated cards. The agenda was then formed based on the top-rated items.

By adding this structure to a conversation, everyone who came to the event had a chance to contribute their thinking and for their thoughts to be validated and evaluated. This transparent process revealed what mattered to the group. People with special interests couldn't disproportionately affect the event by hijacking the agenda or overwhelming the conversation. Everyone felt included in the process because it was deemed “fair.”

This consistently successful activity fascinated me: It became the first step along a path of learning how to scale conversations. Inside this little game were critical components which could be examined and then scaled up. Practically, it boils down to four things you need to provide everyone with:

1. A safe place for diverse people to share independent thoughts
2. A bias-free method for everyone to evaluate thoughts one by one
3. A fair process for all thoughts to be evaluated equally
4. A method to understand what thoughts matter most

Along with my initial experiences gathering perspectives in my role as a Community Development Leader, I was hired to facilitate an assortment of events, with 50 to 100 people, in which a mixed group of stakeholders, with different needs and agendas, needed to agree actions. While tackling subjects such as local economic development, policy, strategic plans, health spending, etc., I constantly leveraged the conversation power of the facilitation tool “35.” It consistently created great insight and the necessary buy-in for whatever actions resulted from the gathering.

This was my foundational experience of scaling conversations: Anyone can repeat it at a face-to-face event with a stack of recipe cards and a pen for everyone. I recommend changing one aspect of the instructions you can find online: Instead of having pairs of people debate the cards and agree how to distribute points, simply instruct everyone to rate their thoughts on a scale of one to five based on how strongly they agree (one = strongly disagree and five = strongly agree). This maintains the feeling of safety for the participants (the first hierarchy level of scaling conversations) and leads to a better group answer.

Moving scaled conversation into an online environment may have seemed like a natural progression to some, but it wasn't to me. I wasn't a “software sort of guy” and strongly believed in the power of being in the room with other humans; to look one another in the eye as ideas about the future were discussed. But my friend Lee White, former Executive Director of Outward Bound BC, observed “35” in action. He told me that a connection of his, Jim Firstbrook, had recently read James Surowiecki's *The Wisdom of Crowds*. Jim and his software development team had taken an angel investment from their former boss Amos Michelson, CEO of a BC company called CREO. They were apparently trying to build crowd wisdom software by aggregating ratings on electronic sticky notes in a similar way to my facilitation process.

I was skeptical, to say the least. But Lee was persuasive and resolute that there was power in the idea. He convinced me we should meet with Jim to share ideas at his upcoming launch event.

I learned later from Jim that, when Lee saw this potential, at the same time he had reached out to me he had also contacted Jim about this guy who drives around running

meetings in remote communities using recipe cards. And Jim's reaction? Skepticism. Doesn't seem like a fit.

Fortunately, Lee succeeded in convincing both Jim and I to meet, and a few weeks later Lee and I traveled to Vancouver to attend the crowd wisdom software beta launch workshop. The rest, I suppose, is history.

After seeing this early attempt to facilitate conversations online I very literally dropped what I was doing and started working for the company, Thoughtstream, for free and for no equity. We had a simple agreement—to split the revenue from any early sales I could make as the beta product developed. I instantly both loved and hated what the team had built as their first guess at how to scale conversations online. But, one thing was clear to me: I felt passionate, and I wanted in.

The point of this is not what I did, but rather why. I had refined my face-to-face facilitation skills for nearly 15 years and had experience with many different methodologies beyond “35,” including well-known gathering formats, such as World Cafe and Open Space. I was proud of my skill and my growing reputation but I was also growing increasingly disappointed by the limitations of face-to-face events.

Attendance at collaborative planning events was typically poor. Many of the people who did attend had good intentions but were also privileged and homogenous. Methodologies like the “35” game prevented or stymied big personalities and extroverts from taking over any agenda. But the results of employing “35” were ultimately still dictated by the people in the room. The staggering majority of people ultimately affected by the decisions of the small group were not able to be in the room. Every facilitator I knew was trying to attract more people, larger groups, to their events to avoid small loud groups taking over agendas about decisions that affected a lot of people. This same

problem exists in nearly every organization in the world. Millions of people affected by decisions about training, funding, strategy, etc., have no, or very limited, ability to be a part of the conversation about those decisions. Much to the detriment of the outcomes.

The internet held amazing promise. Jim and the team had a huge idea. With the right structure anyone can go online to participate and share their diverse and independent thoughts, in any time zone, and even in any language. Algorithms can ensure all thoughts are seen by everyone. Digital “sticky notes,” and the thoughts on them, can be translated into any language in real time, and shared with people worldwide in a microsecond. The wisdom of the crowd can be leveraged to solve nearly any challenge an organization might face. While not everybody has perfect access to the internet, the number of people who do completely dwarfs those who can equitably participate in face-to-face conversations about issues that affect them.

A few years after Lee and I met with Jim and saw the beta software, we passed over a million people exchanging thoughts on our newly named platform: ThoughtExchange. We provided a platform for hundreds and even thousands to come together and share their voice to tackle all kinds of problems. I worked with a superintendent in a school district with 30,000 students. While hosting an online conversation on our platform the district officials had surfaced concerns and priorities from nearly 5,000 people. But in one school, in an extremely economically challenged neighborhood in the district, they only heard from about 30 parents. That particular school had hundreds of students, and therefore hundreds of parents. So, maybe 10% of people joined the conversation making decisions about their kids. Not so great, you might think. But here's the thing. I asked the superintendent: How many people from that school historically show up at town hall meetings or

parent events? The answer: Between zero and four. But usually, unfortunately, zero. The school tries their best, but no one comes. So, a group of 30 people sharing their ideas sounds pretty good. Those same 30 people, gathered in a virtual room, would be quite a force for change if you could access all of their diverse and independent thoughts: With that amount of support, you have the ability to incrementally improve. At zero you don't. Even with the best facilitator on the planet.

The reason I devoted the last decade of my professional, and much of my personal, life to this software company, and eventually became the CEO, was not because of a newfound passion for software and solving technical problems. Luckily, we have other people in the company who have that. My passion has always been for facilitating ways to draw forth the voices of as many people as possible and to leverage that potential. And the internet is the way to do that. It's more inclusive, more equitable…and safer than any face-to-face meeting.

With our new digital working environments—rapidly transformed during the early days of the COVID-19 pandemic—every organization now has a unique opportunity to leverage the benefit of internet communication to scale conversations. It was a huge change for me, going from a face-to-face facilitator, an experiential mountain guide, a workshop creator, into an enabler of internet communication. I missed, and to some degree still miss, the energy of the room and the personalities of the people who would show up, however privileged and homogenous. But to deliver on the mission of bringing many voices to decisions there is only one choice that scales. The internet.

After the murder of George Floyd by police officer Derek Chauvin in Minneapolis, Minnesota, people around the

world protested to elevate the need to overcome the issues of systemic racism, police violence against Black people, and ultimately to ensure Black Lives Matter. Understanding their responsibility to be an ally and to participate in the dialogue, leaders from across many sectors held special events and scaled conversations on the ThoughtExchange platform. They asked questions such as: What can we do to improve our ability to be an anti-racist organization and to ensure Black Lives Matter? How can we better support our Black team members? What can our organization do to overcome systemic racism and discrimination? What is on our hearts and minds as we work together to ensure Black Lives Matter? Thousands and thousands of people shared thoughts and considered the thinking of one another as their organizations promised action and deepened their commitment to overcoming racism against Black and BIPOC people. One CEO described the impact of learning from his Black employees as the most effective day of learning so far in his lifetime.

As the CEO of a company that helped these leaders scale conversations with this gravity, I didn't (and still don't) feel satisfied with these achievements: I feel an increased sense of urgency. Hundreds of thousands of people participated in scaled conversations about the health and safety of students, teachers and staff in the pandemic, but millions of other parents did not. Hundreds of leaders scaled conversations to accelerate efforts to overcome racism, and yet hundreds of thousands of leaders did not. Anti-racism, global pandemics, climate action, LGBTQ rights, gun violence, remote worker mental health…. All of these are issues that require people to join the conversation. Now. It's not a matter of if they join the conversation, it's a matter of how.

More than the narrow goal of growing ThoughtExchange, with this book my hope is to do my part in moving forward

a body of work that inspires more research, development, and deployment of conversation technologies to bring people together to solve the most pressing issues in our organizations and on our planet, before we become so divided we blow ourselves up or become so selfish we wreck the planet. With all due respect to those who are working to ensure we can leave the planet and inhabit airless, oceanless worlds…my thinking is we should prioritize efforts down here on this world. It seems worth saving.

The same mechanism that helps revenue leaders increase sales helps public leaders save lives. It's about scaling conversations.

PART I
WHAT'S IN A CONVERSATION?

Before I dive into how to effectively leverage our collective conversation strengths and overcome challenges to scale conversations to include hundreds and thousands of people, I'll first explore the components that are required to make a simple conversation successful with a small group—believe it or not, it can be summed up by one thing: Margaritas. After that I will cover the value of scaling that ability. Then, before discussing how to scale a conversation up I will address the attempts leaders make to include voices now and explain why they are typically unsuccessful. This is done through the lens of what people require to successfully converse.

CHAPTER 1
What's a Conversation?

MARGARITA THOUGHTS

A waiter asks a group what they'd all like to drink. First person answers: A beer. Next person: Sure, me too: a beer. Next few people follow suit and order a few more beers. One person orders a glass of wine.

Then, the final person says to the waiter: “A friend of mine said you make one of the best margaritas in town…and since it's the first hot day of summer, I'll take one of those.”

Everyone else at the table considers this critical new information.

Then the first person says: “If it's not too much trouble, I'd like to change my order. I'd also like one of those famed margaritas.”

Second person: “Me too.”

Third: “Yep, me too, and unless I'm mistaken, make it a pitcher so we can just do a round of margaritas?”

The wine-ordering person is the only holdout. “I'll stick with my wine,” they say.

This type of interaction is at the core of human communication. We share ideas, listen to one another, change our minds at the drop of a hat, and ultimately forget which idea belonged to who in the first place.

> “I'm glad I thought to order margaritas!”
>
> “That wasn't your idea, that was mine…”

“Was it?”

In any conversation with fewer than 10 people, this is, in a word, natural. Small meetings create dialogue and interesting solutions surface. A single idea can become the most important idea in a heartbeat. During small focus groups, or in small chats online, discussions take place and people change their views, combine thoughts, explore where there is consensus, and where there isn't. No problem.

But as soon as that group gets larger than 10 what happens? The most frequent thoughts are mistaken as the most important ones. In the margarita example, the waiter would never be able to discover the “margarita” thought with a large group of tens or hundreds, even if they used the highest standard of survey or polling technology. Every survey output, word cloud generator, person paid to codify feedback, and advanced natural language processing algorithm that clusters similar thoughts would do the same thing: Inaccurately emphasize that BEER! and words similar to beer are by far the best and most loved simply because that term was most frequently shared as a “first-thought-best-thought.” When, of course, given the chance to participate in a conversation and consider the thinking of other people, no one in the group above even ordered a beer.

The curious thing about “margarita thoughts” is that, in a small group, this phenomenon of surfacing important ideas, instead of counting the frequent ones, is just so obvious.

Picture any meeting or group discussion you've had with six or seven people. As you try to solve a problem, everyone shares ideas as others react. Eventually, someone shares a thought that many people resonate with and that becomes an important thought that guides the actions you all take