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Consulting Maxims for Co-Creating Sustainable Futures.



Meeting Design: An Undervalued Skill

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"I did not know when I embarked on training in Behavioural Science that structure is a powerful influence on behaviour. Since then, I have not sought to change people, only the conditions under which they operate."

Marvin Weisbord in Critchley (2021)¹

An animated conversation with cross-divisional executive managers over lunch one day led to a reflection on how much more engaged they were compared to earlier in the meeting. "Well, we always have the best conversations over lunch, or in the bar", they replied. What was different? We were at the annual meeting of regional senior technical executives who were meeting face-to-face to talk about the business and agree division-wide strategies and plans. Topics ranged from capital, operating and R&D expenditure, accident reduction on-site, upskilling the labour force, and various corporate initiatives. How could we, as OD professionals, facilitate these dynamic lunchtime conversations in the meeting itself? How could we contribute to a meeting design that participants would judge to be a good use of their collective time?

Meetings get a bad press – many people see them as a waste of time. Organisations recognise that not everything needs a meeting, but it is worth considering their potential to create an opportunity for engagement. What makes each meeting different is not a set-piece process, but topics people want to explore to enrich their understanding and commit to the work they need to do for the success and health of the business.



There are too many examples of generic, formulaic meetings structured around PowerPoint presentations. These days many take place on virtual platforms; however, for complex or contentious issues, face-to-face is still best, we assert. The purposes of such meetings will vary. For example, attending to such questions as: Is there a specific issue that needs to be addressed? Does everyone need to get on board with a new strategy? Is there alignment around goals and actions between alliance partners? How can we build sustainable and healthy working environments? Do we need a new plan for sustainable improvements in productivity? Each of these topics requires a custom-designed process. How can we, as OD practitioners, use good, inclusive, meeting-design skills to highlight and address wider, system issues, and what value do we bring?

While we feel OD is uniquely placed to intervene in an organisation system by offering meeting-design capability, we worry there is an under-appreciation of the value of co-designing effective meetings. Minahan (2010)² has noted:

“In the New OD, we need to set aside our urge to control the outcomes or to make ourselves look smart in the eyes of the client..., and trust that if we commit to a solid, inclusive, appreciative process, and trust it, we will get better results than in our traditional, linear, positivist approach to OD.”

In this paper, we introduce a contemporary perspective on meeting design, and two cases to illustrate how OD can facilitate engaged discourse on issues of importance for clients. In each, we interrogate our role in supporting that process. The two cases take different approaches, but both involve OD principles and practices for creating conditions for positive, productive and rewarding meetings.

In the first case, a design team of client-representative participants of the meeting worked with a sole consultant to co-design, plan and facilitate the meeting. The consultant provided support and OD expertise; the design-team members led and facilitated the meeting. In the second case, a lead consultant from the Centre for Organisation Leadership and Development (COLD) in Zimbabwe co-designed and planned a set of meetings with senior officials from a newly established government ministry and then led and facilitated the meetings for different cohorts of stakeholders.

A Contemporary Perspective in Practice

We present a contemporary perspective on the importance of dialogue, collaboration and self-managing processes in meeting design. We recognise the organisational tensions between balancing change and stability, between achieving business goals with an environment where people can flourish. Too often a distinction is made between meetings that concentrate on business strategy, financial performance, productivity measures, investment decisions and values. However, we believe OD philosophy and practice can be applied in any meeting. Applying these to meeting-design means creating opportunities

for full engagement, with civility and agency whilst strengthening cross-department and functional work-groups. Bushe (2010)³ notes that, through our own character and skill, OD practitioners can create “the container for transformational change by providing a sense of continuity; enabling authenticity; manifesting intention and freeing up and challenging energy”. This requires a shift in mind-set about what a consultant/facilitator is and does. Do not be a solution (e.g. teambuilding) looking for a problem!

Research and several contemporary and longer-established OD approaches inform our thinking, and whilst we do not intend to provide a comprehensive review, we highlight some of these developments in particular. We agree with Dannemiller and Tyson (2004)⁴ that an inclusive meeting co-design approach works best, and that meetings must be client, not consultant, centred. Clients decide what to do; the OD practitioner adds expertise and helps create the environment where people have agency. We acknowledge the importance of an iterative process of observing, interpreting and intervening, allowing participants to adapt their strategies based on real-time feedback and emerging insights using ‘Adaptive Action Inquiry’ (Human Systems Dynamics, 2010)⁵, emphasising responsiveness and continuous learning in complex environments. Isaacs (1999)⁶ uses the term ‘Dialogic Containers’ to suggest that effective meeting-design is not about dictating how people interact but is, instead, about providing conditions for rich and imaginative connections. Additionally, the four core principles of ‘Open Systems’ (Owen, 2008)⁷ involve getting the whole system into the room, designing for good conversations, trusting the wisdom in the room, and allowing time for reflection – all crucial for generating ideas and perspectives. Marshak (2004)⁸ concept of ‘deep listening and transformational talks’ aims to shift people from polarized discussions towards a more receptive mind-set. We used our knowledge and expertise when applying this research.

Oshry (2003)⁹ developed a method to explore the dynamics of being at the ‘bottom’, ‘middle’, or ‘top’ of any system. He argues that ‘Middles’ are in the best position to integrate the whole system or sub-systems and sees this integrating function as their *unique* power. Our first case, a meeting with a region’s senior technical and operational leaders was consciously designed to enhance this capacity of the Middles. In addition, we incorporated Corrigan (2012)¹⁰ reflections on the ‘art of hosting’ to create participatory and collaborative environments and encourage meaningful conversations.

Creating the Conditions for Positive, Productive and Rewarding Meetings

Case 1. Harnessing the ‘unique power’ of Middles

This case was driven by a corporate directive to improve global responses to new development initiatives, new growth and the required expenditure. The intended output was to agree on a ranked, prioritised list of capital and R&D expenditures, and an overall regional budget required



to deliver them. This annual meeting of the four-country regional, technical and operational-management group fed into a second meeting of regional senior executives and, finally, a submission to the corporate managing directors for a corporate-wide decision.

It is important to note that the approach and principles incorporated into the design process carried through to the larger meeting. All design-team members recognised that the large meeting, itself, was the final stage of a longer co-creation process. For clarity in this article, we describe the design process and whole meeting separately, but the design team saw these activities as one intervention.

The Design Process

The first step was to form a design team of meeting participants. This team (20% of the full attendance at the upcoming meeting) represented various specialisms, positions, levels, geography and national cultures. The team had two roles. The first was to work alongside the OD consultant to plan and prepare for the meeting, taking into account the structure, flow, administration and logistics. Secondly, design-team members facilitated and hosted the larger meeting. This team was crucial for providing a reality check as the design developed whilst also acquiring experience of working with the principles and methods that would be woven into the meeting design. OD research and approaches, such as Isaac (1999) notions of dialogic containers and Marshak's deep thinking and transformative talks were all part of the OD consultant's expertise in creating an architecture of opportunities for the whole system to see and talk to itself.

We consciously incorporated Oshry (1992) notion of power dynamics particularly as it relates to the Middles' integrating function. We know middle managers rarely have a functioning peer group; they have various stakeholders, different business imperatives, are held responsible by their bosses, and are criticised by staff. They are required to be reactive, balancing managing their part of the business with collective responsibility. As Oshry (1992) notes "the more Middles effectively share and assimilate information together the more strengthened they are in managing the parts they are responsible for". Thus, from the beginning, we saw this as an opportunity to enhance this integrating function.

Throughout the design process, new relationships were formed among individuals, groups and divisions, and better ideas and practices emerged with the result that team-member hosts and facilitators were able to deliver the larger meeting with little difficulty. The team had absorbed Corrigan's thoughts on effective hosting including observing, interpreting, intervening and encouraging people to use real-time feedback and insights to adapt their thinking and strategies.

This extract from a design-team memo, part of the invitation to all participants, illustrates the importance of a clear purpose and focus for the event itself:

"The focus is to agree on a ranked, prioritised list of R&D and Capex opportunities and an overall budget required to deliver on those. This output will go to the regional senior executive meeting where overall decisions will be made on budgets and programmes for the regions. We also see it as an opportunity to work together as a new and changing team and achieve common understanding, cohesion, and commitment to changing directions and conditions in order to truly 'raise the game'."

Robust data was critical, and early design-team work focused on providing this robust data, presented well, to enhance wide understanding which was particularly important in a cross-cultural group. In the design phase, the design team identified who had what information and how best to share it. Those with financial and technical expertise pulled together the data and the analysis of it to add context. This included business-significant data such as the long-term potential of technologies, key operational measures and competitive-intelligence analysis. The client was the expert in the data and content; the consultant helped the team to think through how to communicate it effectively using adult-learning principles and a participant-focused mindset. Thus, the design team incorporated a range of preferences for learning, ensuring enough written material for those who prefer to access information, ordered and logically analysed, in that form, as well as opportunities for dialogue and exploration.

The second role for the design team was to act as hosts and facilitators. These roles were defined, including which team member would host particular sessions. All recognised the importance of consciously role modelling a different way of working.

Hosting and Facilitating the Meeting

In the larger meeting the design team worked together as hosts and facilitators, some leading sessions, others updating emerging data, managing the logistics and keeping everyone connected to the purpose of the meeting and its context. Carrying forward their experience during the design phase, the design team ensured opportunities for dialogue and challenge in small groups - microcosms of the whole, with expertise, gender, organisational level and geography represented in each one. It is worth saying that, although the CEO welcomed everyone and reiterated the meeting purpose, he then handed the meeting over to the design team to host and lead while he joined as an equal member of one of the discussion groups.

In introducing each of the meeting sessions, the designated design-team member laid out the purpose and the reason for the process to be used and tailored each session to the business context. Each session began with connecting exercises. People learned who was in the room and shared why they had come together and what their contributions might be. This work was supported by posing relevant questions to encourage reflection and constructive conversations. Throughout, hosts actively encouraged and supported new ways of



talking, thinking and acting. In the small self-organising groups, members facilitated their own conversations, recorded and reported, kept to time, and made sure all were given a voice. They captured the key elements of their conversation – not just bullet-points on a flipchart but the insights, ideas, reflections, dissensions, and the tone and feel of the discussions. All sessions had been designed to enhance interactive and iterative discussions, with each smaller working group reviewing the information and data, generating their prioritised lists of investment and expenditure and sharing their rationale for proposing it. As we observed these discussions, it became clear that the priorities of the small groups were remarkably similar. Conversations were lively, produced new ideas, and introduced people to a wider variety of views and expertise; and everyone began to act differently, shifting from self-interest to the benefits of the whole division. They managed their time well and ensured open and comprehensive discussions. In plenary, proposals were presented and explained in terms of their content, criteria and rationale which the technical group from the design team harvested and consolidated to create one combined list. This list was then ranked using a multi-voting method, re-validated and clarified, and next steps agreed. Finally, the design provided reflection time so participants could think about how they had worked together, and what had helped the conversations to go smoothly and inspired creativity, and what was energizing.

We offer a final word on the role of the consultant. In the design phase the consultant added value through using OD thinking to support the process, including custom designing how to input complex technical and financial data, as discussed above, and how to create a meeting flow. The Meeting Canoe¹¹ (Axelrod, Jacobs, and Beedon, 2004) provided a structure, a flow which included connecting people, building a sense of shared context, envisioning common desires and aspirations through to action planning, and reflection. Crucially, the consultant did not actively facilitate; participants led the sessions. The sole OD consultant oversaw the process, providing coaching or steers to the meeting hosts when needed, noticing when energy, enthusiasm and engagement were high, and when the meeting became lifeless and flat. The consultant suggested interventions to unblock obstructions or create space for new topics if there was a need for further exploration. Their role was clearly to support and coach, rather than control the process. It also included the rather humble task of making sure participants always had a clean, organised and well-equipped work area. Cleaning away coffee cups and dirty plates, and restocking materials may not seem like an OD role but helping to keep the work area tidy and well equipped is an important part of the job. Participants always had what they needed when they needed it, so they could focus on their tasks.

Case 2: Co-creating with Ministry Sponsors a Stakeholder Engagement Process

The Zimbabwean government established the Ministry of Skills Audit and Development in September 2023, embarking on a transformative journey to galvanize the

nation's innovation and industrialization. This Ministry is committed to cultivating a robust and competent workforce, accelerating Zimbabwe's aspiration to attain upper middle-income economy status by 2030. Its strategy actively champions the development of critical skills, ensuring the country thrives amidst global advancements, grasping the opportunities presented. By collaborating with educational institutions and other key stakeholders, it advocates for dynamic learning environments that seamlessly integrate theory with practical, entrepreneurial, and psychomotor skills, and empowers graduates to make a meaningful contribution to national development. To achieve this end, the Ministry sponsored 49 stakeholder consultations in 2024, which included other Ministries and Departments working with government agencies, as well as the private sector, education institutions and civil society organisations. One driver for this collaboration was reinforced during these stakeholder consultations where, in their words, the country's universities were "churning out graduates" who were too theoretical, lacking the requisite skills for national development. Hence the focus on bringing together the learning institutions in education, training and innovation to fully integrate theory and practice, which required a culture shift that values skills rather than the acquisition of certificates. The mining sector, a strategically important one for Zimbabwe, was selected for additional work including research into that sector's skills gap.

The Design Process

The Centre for Organisation Leadership and Development (COLD) was invited to help design and then facilitate the new Ministry's stakeholder consultations. The lead COLD facilitator (one of the authors) was responsible for managing the program design, harvesting all relevant information and documentation, and meeting logistics. A COLD co-facilitator handled the additional mining-sector research. Directors from the Ministry provided administrative support and issued invitations to stakeholder participants. Throughout, COLD took a co-creative approach with the support of the Honourable Minister, the Permanent Secretary, and the directors and staff in the Ministry. Breaking with past practice which involved people gathering to listen to political leaders with no engagement, the Minister modelled a new consultative approach which was stake-holder centred, interactive and generative.

As OD practitioners, we were conscious of Minahan (2010) urging OD practitioners to be better at blending culture and business, tuning into organisational politics, keeping a system focus, and becoming known and trusted by senior leadership. Thus, we actively worked with the sponsors as co-designers. Each of the 49 meetings were comprised approximately 50 participants. The overarching objectives were the same; however, we incorporated different approaches to acknowledge each group's unique needs. Additionally, all meetings were framed in the context of the skills revolution required in Zimbabwe and the financial implications thereof. To signal high level commitment, the Ministry's Honourable Minister and Permanent



Secretary opened each meeting, welcomed people, reinforced common messages, acknowledged participants, articulated the invitation to participate, and explained the process and principles.

Although different stakeholders needed their own context, all 49 meetings incorporated OD concepts and practices, specifically Isaac's ideas of 'dialogic containers' and Marshak (2004) 'deep listening and transformational talks', to support the aim of shifting people from polarized discussions towards a receptive mind-set. Aspects of Owen's *Open Space* method informed the design by acknowledging people's capabilities for self-organisation and by creating conditions for creative interactions. As facilitators, we were cognizant of Bushe's observation that, in complex adaptive systems, we need to understand the influences and interactions of parts of the system, and the meanings people make of them. Using Corrigan's *Art of Hosting, and Adaptive Action Enquiry*, we concentrated on creating opportunities for meaningful conversations, and on iterative processes of observing, interpreting, and intervening, encouraging participants to adapt their strategies based on real-time feedback and emerging insight. Eric de Groot and Tineke Koot's¹² *5-P Model* for meeting design helped us to organise around purpose, people, products, protocols, and places. In this design phase, agreeing on protocols for engagement helped set expectations, encourage active participation, and reach agreement on a set of standards of behaviour that we wanted to support.

COLD's Facilitation of the Meetings

Our role as OD hosts and facilitators was to invite the groups to organise around conversations or ideas they wished to explore with energy and enthusiasm. We will illustrate this with one stakeholder group, the Zimbabwean province of Mashonaland Central, which was comprised universities and industry representatives. We formed three discussion groups to discuss these key areas: 1) resource endowments in the province, 2) relevant core skills required, and 3) policy and practical actions to make Mashonaland Central an economic hub. Each discussion group focused on one question, selected their group facilitator, and agreed on principles to guide their interactions. In acknowledgment of tradition, they were seated in 'talking circles'. Our COLD facilitators' role was to visit all circles, listen and provide guidance. We introduced Owen's *Law of Two Feet*, so that participants could move between groups if they felt they had contributed all that they could in one and wanted to engage and contribute in different discussions. In the beginning, members tended to push their self-interests whereupon we intervened to provide counselling to reinforce the concept of a 'safe space'. We began to see a shift to accommodate the wider interest. Each group then presented their output in a plenary dialogue where issues were clarified, challenged and supported. Key points were summarised after each presentation, and a stakeholder members' committee acted as a review team, thus ensuring the participants had ownership of the final report.

Overall, as meeting hosts and facilitators, COLD reinforced the purpose of the gatherings and established clear protocols for communicating and engaging. We encouraged open dialogue and collaboration, actively guided discussions, ensured all voices were heard, adapting our roles as needed. We supported Corrigan's four patterns of meaningful conversations by posing these four questions: Are participants fully present? Is everyone participating? Is the space being held and hosted? Is the group, itself, co-creating its work? COLD hosts and facilitators encouraged participants to adapt strategies based on real-time feedback and emerging insights, and framed discussions around questions, such as "What is happening?" (*What?*), "What is emerging?" (*So What?*), and "What should we do?" (*Now What?*). We helped participants navigate uncertainty and complexity, and encouraged groups to explore their challenges in order to co-create solutions. As a result, outcomes were more resilient and responsive

Finally, we recognised the importance of 'harvesting' in effective meeting design. This is the process of capturing and synthesizing insights, ideas and outcomes, which involved collecting notes and photographs, reflections and key themes, and sharing them with participants to preserve collective knowledge and inform future actions. To support this, participants were introduced to harvesting tools such as flipcharts, whiteboards and rapporteur note-taking. The majority requested presentations and reports be sent to their emails for future reference. Participating organizations published insights about the 'skills revolution' on their social media platforms. Each group identified a parent Ministry or province representative to champion the creation of a sector-specific report. Some provinces created social media groups where the conversations on skills development are still ongoing.

Conclusion

In both cases described here, we, as OD practitioners, set out to demonstrate how we apply our knowledge of contemporary OD concepts and practices to create the conditions for meetings which participants feel are worthwhile. Meetings, however good, do not, on their own, create transformation but they do provide opportunities for people to engage in real work that will make a difference. Using a co-creative approach, both the cases reflected an important shift in group-dynamics – a reorientation from meetings that had been hosted previously by either a senior leader or facilitated by an external consultant who supplied a design and meeting structure, to meetings that were participant-focused, with people working together to design them. In the first case, participants facilitated themselves. In the second case, the meetings were organised and structured with the client's involvement and support. They illustrate the principle that representatives from a whole system can be trusted to come together for meetings that are of truly significant value.



Over the years, we have learned to stop structuring and controlling meetings for orderliness and predictability. When we use our OD skills to work collaboratively with clients to shape a meeting process that provides more freedom, surprising and exciting things can happen - for our clients and for us. By creating different conditions to support behaviours like deep listening and skilful dialogue, conversations move from polarised discussions towards more receptivity to other views. As Meg Wheatley observed in conversation with Peter Senge¹³, "We need to concentrate on finding ways to bring people in the organisation together, finding ways for them to be in dialogue, and trust they can be very committed to the organisation".

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BIOGRAPHIES

Justine Chinoperekweyi worked with institutions including academic and vocational systems in Africa, Asia, and France. He designed and delivered tailored faculty development programs for Zimbabwean, Indian, and Filipino schools. As an academic and field mentor, he supports Masters, doctoral, and executive education programs in Africa, Asia, and France. He works with educational and private sector institutions in improvement planning, corporate governance policy review & development, SMEs development, curriculum review, faculty engagement, career services, quality assurance, and student success. He designs workshops, mentorship programs, and provides learning assessment support. Justine worked on OD & Case Management program design, and executive professional education program attended by members of two government departments in Afghanistan. He co-designed the Women Reorientation and Capacity Development initiative targeted at Afghanistan women; and was advisor on one Afghanistan SMEs incubation scheme. He is the CEO of Centre for Organization Leadership and Development, Zimbabwe. He is the author of a number of books including *Organization Development Review: Resource for Practice Academics and Instructional Practitioners*.

Cheryl Young spent over 35 years supporting top management of organisations to introduce and implement change, and build capability in line with their purpose. This included work in organisational development and design, culture change, large-scale whole system interventions, and leadership team development. Her approach was to work in partnership with leaders helping them see their organisations more clearly, explore possibilities, and implement practical approaches to complex situations. She worked with different national cultures, often through international joint ventures and alliances in multi-national organisations in sectors such as energy, satellite technology, international banking, food and drink, universities, public sector and NGO's. She has a BA in Psychology from Simon Fraser University in her native British Columbia and an MSc from University of London. Having retired from direct client work, she now mentors and supervises external and internal OD&D consultants in the practical application of OD&D in complex systems.



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