**Thank you for downloading "How Many People Should Be in the Room?".**

The Strategic Offsites Group is the world's preeminent consulting firm for designing and facilitating strategy offsites, executive workshops, management conferences, and strategic planning processes. Over the past 16 years we've helped hundreds of executive teams in 19 countries across a variety of industries with their most important strategy conversations. It's the primary focus of our work.

If you would like more information on our firm, or would like to discuss your company's strategy needs, we would be happy to set up a call. **Please feel free to email us at [Contact@StrategicOffsites.com](mailto:Contact@StrategicOffsites.com) or call our office at 617-266-8711.**

Thanks again for your interest in our firm and our work. We look forward to hearing from you.

Best regards,

Bob and Cary

**BOB FRISCH**
Managing Partner

**CARY GREENE**
Partner

Bloomberg Businessweek®

May 14, 2010 | businessweek.com

Viewpoint

# MEETINGS: HOW MANY PEOPLE SHOULD BE IN THE ROOM?

## An offsite meeting's invitation list should reflect its purpose and nature. Do you want to be informative, interactive, or achieve something?

As offsite meeting specialists, we are almost always asked how many people should attend the session we're designing. Our immediate response is usually a question: What is the objective of the meeting? Is it to brainstorm ideas? To discuss options and improve them? To make a decision or select an option? To align on the action plan? To ensure an effective meeting, the number of attendees should align with the desired outcome.

Recently, for example, our client team at a large investment company was preparing for a two-day strategy rollout session with the entire senior management team, plus a "few key stakeholders." The objective of the offsite meeting was to engage the executive team in a working session at which they would translate broad, 5-to-10-year strategies into divisional or functional plans—strategies with billions of dollars at stake.

The meeting organizers had very different views as to the maximum number of attendees. One senior leader had already invited all nine of her direct reports, implying an overall group size of 60 to 70 attendees. Another had suggested the room essentially be cleared, save for three or four top executives; as far as he was concerned, only they could make decisions about the execution path. Who and how many to invite had become a politically fraught issue.

To address the problem, we started with guiding principles based on recent client experiences in which making objectives explicit and aligning group size to those objectives was an effective way to proceed. The starting point is a "naturally occurring team" of senior executives: the CEO and her direct reports. Sometimes, this team is the perfect size. But some managers try to use this fixed group for all purposes, rather than expanding or contracting a meeting's size to suit the topic. Here are some broad guidelines with examples.

**Information Sharing:** If the objective is one-way communication, the group size can be unlimited. A recent media client's session was exactly that, to "communicate the strategy," in which case there was no limit to the group size allowed. Organizers simply had to make sure that participants' expectations were clear and that not everyone would be able to speak.

**Ideation:** If you are looking to generate lots of ideas and put creative thinking on the table, a larger group—from 20 to 35 participants—is preferable. One financial client held large-group brainstorming workshops in all of its regions looking for innovative ways to drive growth—ideas that could only come from those closest to customers. In this case, more input helped in the brainstorming. Remember that having too large a group can stifle expression. When the group grows to this size, consider using breakout groups to allow more conversation, and be sure to have clear criteria that allow for "structured" brainstorming, which will produce a better outcome.

**Discussion:** Seeking input and improving options means a relatively smaller group of up to 20 participants. These are bread-and-butter meetings and should be easy to conduct, although many clients tend to pack the room unnecessarily. For instance, a client in the insurance industry suffers from a meeting culture in which invitations are sent almost automatically to "all stakeholders." This is counterproductive: Limit invitations to key stakeholders—not every team member that could possibly be affected.

**Agreement or Alignment:** When you're trying to gain alignment on a set of options, either through consensus or majority, you need an even smaller group, from 6 to 14 participants. A credit-card client of ours uses teams outside the senior executive group to generate options, then has a small senior group consider them so that its members can be fully aligned on the options being entertained. Smaller teams are very good at considering and selecting options; if you want closure, make sure data is on the table and put final decisions to the top managers.

**Decision:** When the stakes are high, it is best to limit your session to the key decisionmakers, typically from three to six participants. At a media company client, only the highest executives are in the room when big decisions are being made because the CEO wants to hear from the top lieutenants he trusts implicitly. By this point in a strategy process, options should be clear from a pros-and-cons perspective; you need only ensure that the options are individually "bulletproof."

**Action Planning:** Once decisions have been made and options chosen, a larger group is required to put plans in place—as many as 25 to 40 participants if the objective is to align teams on cross-functional plans. At a client food manufacturer, a team of approximately 35 met to hear a presentation of the strategy, then broke into teams of five to seven individuals to sketch out first drafts of the component strategic plans. In this way, they not only were able to hear the strategy, but also better understand the execution requirements and the specific roles they would play.

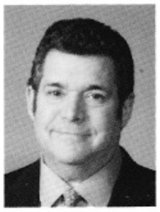
Most often, the bias is to have too many people in the room, either because there is a "first cousins at the wedding" problem (if you invite one, you have to invite them all, plus spouses), or because managers want to ensure that "everyone's on the same page." However, if the real objective of the meeting is to make a tough decision, a smaller group is optimal. Showing discipline and holding the line on attendance is difficult, but critical to success.

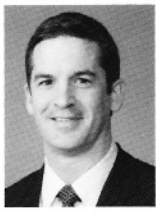
Alternatively, meeting organizers sometimes want to limit the number of participants in order to "be more productive." But in cases where a broader perspective better suits the purpose of the meeting, having more opinions in the room could be perfectly fine.

In the case of the large investment company, it was clear that the major strategic decisions would have been made before the session started. Because the overall strategy was locked down, the real objective of the session was to engage a broader team in discussions around their execution options, then do action planning so that the broader team would own the strategy.

With those restated objectives in mind, the organizers tailored the size of the meeting accordingly, allowing more participants than would normally be invited to a senior-level meeting—about 16 to 20 in total—but held the line at 10 additional invites overall. This resulted in a more thorough discussion of the execution path with a healthier range of perspectives, which in turn allowed for a much more accelerated implementation phase than would have been possible if the meeting had been configured differently.

Best practice is for executives to have a portfolio of different meeting types in mind, flexing the size and composition of the group to the circumstances, relative to the size of the company. Understanding the relationship between setting clear objectives and having the right number of participants translates to better meetings. And better meetings mean better outcomes.





*By Bob Frisch and Josh Peck*
*Bob Frisch is managing partner and Josh Peck is senior engagement manager of the Strategic Offsites Group in Boston.*