

## **NEW GAME-PLAN CASE STUDY**

### **UK TRADE AND INVESTMENT - TRADE ASSOCIATION FORUM: ANNUAL CONFERENCE**

This case study summarises how we designed, facilitated, analysed and reported a Brain-Pool Workshop to enable UK Trade & Investment (UKTI) to consult Trade Association stakeholders on its new strategy. The Workshop provided UKTI with a large volume of instant feedback on its proposals in a single morning event.

#### **Background**

UKTI, sponsored by the Department for Business, Enterprise and Regulatory Reform, supports UK companies trading internationally and overseas enterprises seeking to locate in the UK. It helps companies 'realise their international business potential through knowledge transfer, and on-going partnership support', using its 'position within Government, in-depth knowledge of UK regional business and a global network' (see [www.ukti.gov.uk](http://www.ukti.gov.uk)).

Since its formation in 1997, the TAF has been 'encouraging the development and sharing of best practice among UK trade associations and promoting the role of effective trade associations to government, industry and the wider public'. The Forum publishes a Directory of UK trade associations, and provides its members with a range of services and activities designed to assist them in the strategic development and day-to-day running of their organisations. The Forum is not a policy-setting body (see [www.taforum.org](http://www.taforum.org)).

#### **Objective**

The UKTI and TAF have held regular half-day annual conferences. Traditionally, these have involved a series of presentations, with questions and answers, and discussion. In 2004 it was decided to 'break the mould' by introducing a more 'deliberative' approach, under the banner 'Working in Partnership'.

In particular, UKTI wished to:

- Inform associations about planned changes in its funding, organisation, and operations, following the latest Government spending review;
- Develop collaborative solutions to some challenges arising from this new situation;
- Identify areas of current good practice which would become powerful tools in furthering the interests of UK trade and investment in key sectors represented by associations.

Many associations were keen to find out more about the implications of the changes for their work. For example, there was concern that long-standing support arrangements were to be altered considerably. The meeting was expected to have its fair share of controversy!

Against this background, we were commissioned to design, facilitate, analyse and report a highly interactive event based on our 'Brain-Pool Workshop' approach.

The meeting was carefully structured around a series of questions and exercises. We enhanced the traditional conference format by using special laptop computers, linked by a wireless network. These enabled delegates to enter contributions anonymously, and to read and reflect on what others had written. Round-table discussions were also used to help delegates to develop and refine their individual contributions. The result was a rich flow of ideas to stimulate plenary discussion. All contributions were also retained for later analysis.

#### **The Process**

The conference was held in London on a morning in September 2004. It was attended by over 50 delegates, mainly representatives of trade associations, plus a few UKTI staff. Our team included a facilitator, an analyst, and staff managing the supporting technology.

We worked closely with the sponsors through four stages: scoping and design; facilitation on the day; analysis, both on the day and subsequently; and reporting and action planning.

## **Scoping and design**

Pre-conference preparation included designing the sessions and producing guidelines for delegates. Promotional and registration work was handled by the UKTI and TAF. On the day itself, the participants were seated at tables of 4-6, including a table leader from UKTI. Special laptop computers, linked by a wireless network, were available to all participants.

## **Facilitation**

The conference was not a loose brainstorm - it was carefully structured around five sessions:

- **Key-note speech** by Sir Stephen Brown, Chief Executive of UKTI;
- **Challenge session:** Alignment to the English Regions and Devolved Administrations;
- **Challenge session:** How Associations can engage in third-party delivery;
- **Reflection session:** used by delegates to record any further questions or comments;
- **Panel session:** a facilitated discussion of some of the key themes.

While listening to Sir Stephen Brown's speech, delegates were asked to input questions and comments on 'Alignment to Regions', 'Third-party delivery' and 'Other' issues. Key themes from the 180 contributions thereby collated were fed into the later Panel discussion.

In the Challenge sessions, delegates considered specific questions in round-table discussions, and then entered individual written responses using the special laptops. The questions were designed to explore the implications of issues raised in the key-note address.

Three questions were posed to delegates in relation to Alignment to the Regions:

- *To successfully align to Regions in order to promote trade and investment, what good practices should Associations consider to overcome the barriers evident today?*
- *What should UKTI do to ensure that the shift to Regional focus, to promote trade and investment, is effective and successful for the sectors represented by Associations?*
- *Given the background of a shift to a Regional focus for promoting trade and investment, what must UKTI continue to do at a national level, and why?*

Five sets of questions were asked in relation to Third-party delivery:

- *To develop trade and investment, which services or capabilities could Associations provide for Third-party delivery? Could there be roles of a more strategic nature that Associations could perform?*
- *Would there be adequate capacity as well as capability? Would there be adequate geographical reach? Would the fields of interest of individual Associations adequately align to the sectors recognised by the Regions? How might Associations address possible issues of capacity, reach and alignment?*
- *Are there other organisations that could fulfil Third-party delivery? What type of organisation? What kind of service/capability?*
- *Recognising that many organisations run into difficulties when moving to Third-party delivery, which 'rules' and practices should UKTI and Associations adopt to get it right?*
- *What functions and accountabilities must remain 'core' for UKTI and so be ruled out for Third-party delivery? To successfully align to Regions in order to promote trade and investment, what good practices should Associations consider to overcome the barriers evident today?*

Having recorded their contributions during these sessions, delegates were able to read and reflect on the contributions made by others. Delegates provided 158 contributions on 'Alignment', and 137 on 'Third-party delivery'. Following these sessions, 60 points were noted in response to a request for any further 'positive opportunities' or 'concerns'.

From the total of 530 contributions made during the morning, we identified nine themes. Specific questions embracing the points made were then developed from a review of the contributions relevant to each theme. The questions were put to the Panel for a response. While this was happening, delegates had a further opportunity to enter comments. These contributions were displayed on a single screen for everyone to see, and helped to provoke further discussion and exchanges between the Panel and the floor.

This approach, which drew faithfully on the wide range of contributions made by delegates, ensured that the challenges considered in the Panel session reflected the concerns of the meeting as a whole. This is in strong

contrast to traditional Panel discussion sessions, where the choice of issues is dictated solely by whichever delegates catch the Chair's eye!

At the end of the formal proceedings, delegates were invited to assess various aspects of the conference and to offer comments on the whole event.

### ***Analysis***

Soon after the conference, the sponsors, and all the delegates, were provided with a Verbatim Report (38 pages), containing all the contributions and the results of the conference assessment. This ensured full transparency, and enabled everyone to use the output for themselves or their organisations. We also prepared a Synthesis Report (17 pages). This drew fully on all the contributions, in all the sessions, including points raised in discussion. Extensive use was made of direct quotes from the verbatim report to illuminate the issues.

### ***Reporting and action planning***

Our Synthesis Report presented the outcome of the conference under four main headings: Generic issues, Alignment to Regions, Third-party delivery, and Implications for trade associations. The report is available from New Game-Plan and was published for TAF members on the TAF website, [www.taforum.org](http://www.taforum.org).

We also offered further suggestions for action by UKTI, the TAF and individual associations. The issues covered included: managing planned consultation exercises; keeping associations informed of current developments; raising awareness among regional institutions of the role of associations; defining new ways of working; and sharing good practice.

### **Learning points**

The conference generated a remarkable volume of contributions from a relatively small group of people. The richness and quality of this output would have been almost impossible to achieve without the Brain-Pool approach. Specific benefits included:

- **Offering an immediate response to newly-announced proposals.** Delegates were able to give an immediate reaction to the strategic changes set out in the key-note speech, and the subsequent contributions were readily available for the UKTI to use in planning further consultation with industry. One comment was: 'Very effective means of getting views and comments on issues.'
- **A more varied conference programme.** The addition of round-table discussions in small groups and the ability to enter, reflect on, and respond to 'live' written contributions added welcome new dimensions to the traditional mix of 'talking heads' and plenary discussion.
- **The technology added to the event without 'taking over'.** Many delegates found the use of special laptops to collect and display contributions both novel and interesting. Comments included: 'the use of the IT was a good idea and worked well'; and the 'technology used was a very useful facilitator for the discussion'.
- **Instant capture and feedback of ideas.** Delegates liked the way in which everyone could enter contributions simultaneously, and, moments later, review all the points made.
- **Everyone had equal 'air-time'.** In traditional meetings, success in getting a point across depends heavily on catching the Chair's eye; too often, many people do not get the opportunity to speak. As one delegate commented, the Brain-Pool approach 'gave everyone a chance to comment, not just the usual three vociferous members'.
- **The Panel discussion was based on a representative set of questions.** The ability to identify themes by ordering and grouping contributions ensured that all the main issues were covered. This is in contrast to the traditional Panel discussion where only a handful of those present get the opportunity to ask questions.
- **Full information capture.** Delegates noted the sheer volume of questions and comments - far more than could be collated using traditional techniques. They were pleased that 'associations were able to ask so many questions' and noted that our approach delivered 'far more feedback than a conventional seminar'.

- **Anonymity enabled by the technology encouraged participation and frankness.** Many delegates welcomed the ability make their comments and questions anonymously: 'Opportunity for anonymous comment is excellent'.
- **Interesting and productive sessions.** Using a clear structure, based around tackling different questions in discrete sessions, made for a stimulating event. Several delegates commented favourably on the format and benefits of this 'structured interaction'.
- **Independent facilitation helped ensure impartiality.** Our independence from both the UKTI and the TAF helped to ensure that both 'sides' had 'a fair crack of the whip'. While some delegates had wanted a more robust approach to the final Panel session, there could be no doubt about the mood of the meeting, as reflected in the detailed contributions.
- **The verbatim report ensured full transparency.** The report provided soon after the conference enabled everyone to see all the contributions made. No-one needed to take notes.
- **The synthesis report made sense of the huge volume of contributions.** Our analysts produced a totally independent synthesis report, drawing solely on the contributions made by delegates, within only a few days. This provided a huge range of distilled ideas on the topics discussed, together with clear pointers for follow-up actions. It also effectively captured the emotional and political mood of the meeting.

### **Conclusion**

This conference brought together over 50 industry representatives from diverse business areas to consider and respond to proposals affecting their interests. The group was truly cross-sectoral. This 'live' consultation generated several hundred ideas regarding the future of collaborative efforts to facilitate trade and investment. We faithfully distilled these raw contributions into a report offering an agenda for action for all parties.

The conference demonstrated the power of the Brain-Pool approach in canvassing views on a range of issues surrounding proposed changes in policy, priorities and working practices. The format of the conference, the mix of sessions, and use of special laptop computers to collect contributions were all welcomed enthusiastically.

The conference provided vivid and direct insights into the challenges surrounding how the UKTI and trade associations could best work together in the future. The meeting, and subsequent reports, conveyed not only the strength of industry feeling about the implications of change, but also provided positive recommendations for future collaboration and good practice. In particular, the detailed articulation of issues and views in the synthesis report provided a firm basis for the UKTI to develop detailed proposals for consultation on specific initiatives.

This conference shows that the Brain-Pool approach offers a sound approach for any public body seeking to understand the views and concerns of key stakeholders over proposals for change in policy, priorities, or working practices. It can be used at various stages:

- As here, once strategic aims have been defined and the next step is to draft detailed proposals for consultation, taking account of initial stakeholder reactions;
- Once a consultation paper has been issued, and the views of specific stakeholder groups or communities need to be canvassed;
- When a consultation exercise has been completed, to provide a 'reality-check' on emerging conclusions, before final decisions are made.

### **Further Information**

New Game-Plan is a specialist company which catalyses strategic change for leading global companies, public bodies and cross-sector groups. Our approach is innovative and distinctive, fusing Knowledge, Facilitation Services, a Practical Toolkit, and Supporting Technology. Our expertise and experience is broad, across many sectors. We have particular strengths in research and innovation. For further information, contact Dr Ray Smith: Telephone: 01428 661517. E-mail: [info@new-game-plan.co.uk](mailto:info@new-game-plan.co.uk). Web: [www.new-game-plan.co.uk](http://www.new-game-plan.co.uk).