DESIGNING SUCCESSFUL MEETINGS

UNIT 1

Meeting Focus: Content Process

A Participant’s Guide
to accompany the video: “Meeting Focus: Understanding the Importance of Content Focus and Process Focus”

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INTRODUCTION

IMPORTANCE OF MEETINGS

Meetings are important. Nearly everyone is involved in meetings daily. People in middle management, for example, spend 35 percent of their time in meetings. Most work is accomplished, not by one person working alone, but by people working with each other to accomplish a common task. In many instances, this work takes place during meetings.

Meetings occur whenever two or more people interact with each other. When meetings are productive, they enable people to:

- better coordinate their efforts;
- reach agreement; and
- implement decisions and plans.

Think about all the time spent attending meetings. As a meeting organizer, this commitment in time increases significantly when time spent planning for a meeting and following up on it are included. Time is often equated with money. Saving time is saving money in most organizations. This is why it is critical that meeting organizers “Design Successful Meetings.”

A key ingredient of a successful meeting involves having a good beginning. The next section focuses on this important ingredient.
Designing Successful Meetings

MEETING EXPECTATIONS

GOOD BEGINNINGS

We all know that the expectations we take into any meeting have a very strong influence on our perception of success at the end of the meeting. As a result, it is important to acknowledge and legitimize participants' expectations about what they want to accomplish at the beginning of the meeting. With this information, the group can work to define a common purpose or content focus for the meeting. Agreement about a common purpose will result in more realistic expectations and make success more likely.

Acknowledging Expectations

The following exercise is designed to acknowledge the expectations of meeting participants. An exercise like this becomes even more important when:

- a group is meeting for the first time and expectations are unclear;
- people at the meeting don't know one another and need the opportunity to participate in a non-threatening situation; and
- people are meeting over a very controversial issue.

This exercise can be introduced with comments such as:

"Many times people come to meetings with different expectations about what they want to accomplish. To find out what your expectations are, let's go quickly around the room and share your expectations for this meeting."

If people are having trouble formulating their expectations, they can be helped with this visualization. Visualizing success...

"Picture yourself at the close of the meeting. It has been successful. You got what you wanted. To experience the success you visualized, think about what you need/want to get from the meeting. In other words, what does success look like to you?"
Writing participants' expectations down on newsprint, taped in front of the group, creates a visual record of the list. Their names should not be written on this record so that their anonymity is maintained. This opportunity can also be used to begin developing the motivation to work together. Ask participants to introduce themselves before giving their expectations. Then, have them answer a simple question which will highlight commonalities with other group members (e.g. why they became a part of the group).

Here is an example of what can be said:

"Before you tell us your expectations for this meeting, could you help us get to know you a little better by telling us your name and something about your association with the group? For instance, you can tell us why you joined the (name of the organization) or how long you’ve been a member."

**WHAT WILL SUCCESS LOOK LIKE FOR YOU?**

*Exercise*

Picture yourself at the close of the workshop. The workshop has been successful and useful.

To arrive at the success you visualized, write down what you need/want to get from the workshop. What does success look like for you?

**Expectations**

- __________________________________________
- __________________________________________
- __________________________________________
- __________________________________________
- __________________________________________
- __________________________________________
- __________________________________________
- __________________________________________
- __________________________________________
- __________________________________________
- __________________________________________
Designing Successful Meetings

MEETING PURPOSE

WHY WOULD ANYONE WANT TO HOLD MEETINGS?

An important element of designing a successful meeting is having clarity about the purpose of the meeting. A meeting which is called to give information may differ significantly from one called to resolve conflict or make plans. As a result, it is critical for meeting organizers to be clear about the purpose(s) of the meeting. The following exercise can be used to highlight common reasons for calling meetings.

Exercise

Take 5 minutes to list some of the constructive reasons for holding meetings. After the list is developed, see how closely it resembles the one on the next page.

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REASONS FOR MEETINGS

Here are some good reasons for holding meetings:

- **Information** - You need advice/information from your group or you want to give them information;

- **Communication** - You want to develop better communication to enhance your group's problem solving and decision making capabilities;

- **Conflict resolution** - People in your group have a conflict and you want to involve them in the process of resolving it;

- **Decision making** - You want to increase ownership and commitment of group members to decisions they have made and have to implement;

- **Goal setting and planning** - Your group needs to develop goals and make plans to achieve them;

- **Leadership** - You want to give group members an opportunity to develop their leadership skills by sharing this responsibility whenever possible;

- **Interpersonal relationships** - You want to improve the way group members relate to one another by strengthening their common bonds (often this involves giving the group an opportunity to socialize over a meal.)
WHEN DOES A MEETING WORK?

We've all attended meetings that turned out to be a waste of our time. You know the ones, where everyone goes off in different directions and the group ends up not getting anything accomplished. Because most of us have very demanding schedules, it is critical that the meetings we plan and attend utilize our resources (our time, energy, money) to their fullest.

This is the reason it is important to be able to design successful meetings. “Success” is often only determined by WHAT got accomplished, or the results of the meeting. We are a task-oriented society and we like to see results. There is another way, though, to define success and that is to look at HOW the work of the group got accomplished or the process used to work on the content of the meeting. This dimension of a meeting, how we feel about it, often is the most important determinant in perceived success.

What=Content

To get at WHAT got accomplished, you have to analyze the CONTENT of the meeting. The CONTENT deals with the focus(es) or purpose(s) of the meeting, what you discussed. Some of the questions you can ask yourself in attempting to analyze the group’s success with content are:

- Did you get the results you wanted or expected?
- What did you actually get done?
- What problems got solved?
- What decisions were made by the group?

How=Process

Now look at the PROCESS of the meeting. (That's HOW you discussed the content.) Some questions you can ask yourself in attempting to analyze the group's success with the process are:

- How did you feel about the meeting?
- Did you feel stimulated or challenged?
- Did you have fun?
- Did the group work well together?
Unit I  Meeting Focus – Content and Process

• How were problems solved?
• How were decisions made?
• Was everyone given an opportunity to participate?
• Was synergy experienced as people built on each other's ideas?
• How were people's ideas incorporated into the final product?
• Was the meeting a battle of egos?

RELATIONSHIP BETWEEN CONTENT AND PROCESS

Understanding the relationship between PROCESS and CONTENT becomes critical when a group becomes involved in problem-solving.

The problem and solution is WHATEVER is acted on; it is the CONTENT.

The PROCESS is HOW the group or individual solves the problem. Examples of processes groups use are:

  brainstorming   listing
  decision making organizing
  discussing     prioritizing
  evaluating     suggesting

If you want an easy way to remember it, suppose you are growing a plant: the seeds and soil are the content, the processes include planting, fertilizing and watering and the outcome (or solution) is the fruit the plant bears.
Designing Successful Meetings

SEPARATING THE "WHAT" FROM THE "HOW"

Video: Meeting Focus: Understanding the Importance of Content Focus and Process Focus.

Meeting One - The Unsuccessful Meeting

Example: This is a Daycare Association Parents' meeting of 12 people.

```
President of the Association:
Good evening. Our preschool director called me today to say that he had an unavoidable conflict and wouldn't be able to attend the meeting. But he did request that we put together a list of daycare center problems as we see them. So, who wants to begin?

Mr. Wong: (trying to get the ball rolling) Violence. You know, all the biting and pushing.

Ms. Wilson: Violence? What you need are more daycare assistants.

Ms. Yoshida: They tried that last year. It didn't work!

Ms. Wilson: They just didn't try it for long enough!

Mr. Wong: Forget the violence. The real problem is noise during naptime!

Ms. Wilson: Noise during naptime!?!!

Mr. Wong: Yes. Noise during naptime!!

Ms. Brown: My Johnny came home with a bloody nose just last week!
```

This meeting isn't working. These parents aren't getting anywhere. To determine why this meeting isn't very productive, let's analyze the CONTENT and PROCESS of this meeting. Remember, the CONTENT is the problem the group is dealing with—as well as the solution. The PROCESS is HOW the group solves the problem.
On this chart write down what you think are examples of "CONTENT" and "PROCESS" in this meeting. Some of the analysis is given to you to get you started.

<table>
<thead>
<tr>
<th>The &quot;What&quot; Content Problem</th>
<th>&quot;How&quot; The Process</th>
<th>&quot;What&quot; Content Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>LIST OF DAYCARE CENTER PROBLEMS</td>
<td>Suggesting/Listing</td>
<td>Violence (e.g. biting)</td>
</tr>
<tr>
<td>Violence (e.g. biting)</td>
<td>Solving</td>
<td>More daycare assistants</td>
</tr>
</tbody>
</table>

- LIST OF DAYCARE CENTER PROBLEMS
  - Suggesting/Listing
  - Violence (e.g. biting)
Designing Successful Meetings

Using the Daycare Association example, we can see how to distinguish CONTENT and PROCESS.

Content Error. The meeting begins with the President suggesting WHAT (the CONTENT) the preschool Director wants the group to work on (list of daycare center problems). She instantly falls into one of the most common (and deadly) meeting traps! She suggests a CONTENT focus, but the group has not agreed to work on it. Her sarcasm and lack of enthusiasm for this task also reflect poorly on her commitment to this focus.

Process Error. More important, the Daycare Association President has not gotten agreement on HOW (the PROCESS) the group will work on the development of this list. She has suggested a CONTENT focus for this portion of the meeting, but not a PROCESS focus (a way for the group to work on the list). To get a group focused on a common task during a meeting, the group must agree on both WHAT they are going to discuss and HOW they are going to discuss it.

KEY INGREDIENTS OF A SUCCESSFUL MEETING–
A GROUP MUST AGREE ON A CONTENT FOCUS
A GROUP MUST AGREE ON A PROCESS FOCUS
Without agreement about a CONTENT focus or PROCESS focus, this is what resulted at the Daycare Association Parents' meeting:

Mr. Wong implicitly and immediately agrees to the CONTENT focus—a list of daycare center problems for the Director—and decides that the best process is to suggest or list issues. He volunteers an item, or suggestion—violence—for the list. This CONTENT focus would have been maintained if other parents continued to offer items for the list.

But Ms. Wilson, rather than following Mr. Wong's lead and suggesting another item, decides to offer a solution to Mr. Wong's problem of violence. By doing this, she changes the CONTENT focus from a general list of problems to the specific problem of violence. She also changes the PROCESS focus from suggesting or listing, to solving.

This segment of the meeting illustrates one of the most common meeting "problems"—jumping prematurely from the problem space to the solution space. By jumping to solutions too early, the group often doesn't get a chance to develop a good understanding of the problem. As a result, the group may end up solving the wrong problem or not defining it. In the worst case scenario, the group ends up solving the "solutions!"

After Ms. Wilson changes the CONTENT and PROCESS focuses, Ms. Yoshida makes matters worse by evaluating Ms. Wilson's solution. Naturally, Ms. Wilson defends her solution. Before Ms. Yoshida can counter, Mr. Wong valiantly plugs on with his listing process and offers another item—noise during naptime. Things really begin to fall apart when Ms. Wilson evaluates Mr. Wong's item. Indignant, Mr. Wong defends his item.

At the end of this portion of the Daycare Association meeting, Ms. Brown tosses in an example which appears to be in support of listing violence as a daycare center problem, though that intent is not completely clear.

This analysis of Meeting One is provided for you on the completed chart on the next page.
# Designing Successful Meetings

## Analysis of Meeting One – The Unsuccessful Meeting

<table>
<thead>
<tr>
<th>The “What” Content Problem</th>
<th>“How” The Process</th>
<th>“What” Content Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>LIST OF DAYCARE CENTER PROBLEMS</td>
<td>Suggesting/Listing</td>
<td>Violence (e.g. biting)</td>
</tr>
<tr>
<td>Violence (e.g. biting)</td>
<td>Solving</td>
<td>More daycare assistants</td>
</tr>
<tr>
<td>More daycare assistants</td>
<td>Evaluating</td>
<td>Assistants didn’t work</td>
</tr>
<tr>
<td>Assistants didn’t work</td>
<td>Defending</td>
<td>Didn’t try long enough</td>
</tr>
<tr>
<td>[Returning to] list of daycare center problems</td>
<td>Suggesting/Listing</td>
<td>Noise during naptime</td>
</tr>
<tr>
<td>Noise during naptime</td>
<td>Evaluating</td>
<td>Relevance of item is questionable</td>
</tr>
<tr>
<td>[Returning to] violence?</td>
<td>Supporting (with an example)</td>
<td>Bloody nose</td>
</tr>
</tbody>
</table>

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Proposed Agenda for Meeting Two – The Successful Meeting

The analysis of Meeting One in the Meeting Focus video highlights many of the mistakes made by the President of the Daycare Association. The other half of the video demonstrates a second, more successful, meeting.

Meeting Two is lead by a President/facilitator who understands the importance of establishing a **CONTENT** focus and **PROCESS** focus during the meeting. She has also developed the proposed agenda (below) to assist her in anticipating the **PROCESS** suggestions she will make to the group to help them in achieving their desired outcomes.

<table>
<thead>
<tr>
<th>The “What” Content Problem</th>
<th>“How” The Process Content</th>
<th>“What” Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establish content focus</td>
<td>Suggesting</td>
<td>List of daycare center problems</td>
</tr>
<tr>
<td>Establish process focus</td>
<td>Suggesting</td>
<td>Brainstorming</td>
</tr>
<tr>
<td>List of daycare center problems</td>
<td>Brainstorming (guidelines clarified)</td>
<td>Five to ten items</td>
</tr>
<tr>
<td>Final list of items</td>
<td>Prioritizing</td>
<td>Two or three top items</td>
</tr>
<tr>
<td>Two or three top items</td>
<td>Brainstorming solution in small groups</td>
<td>Small groups share their list of solutions with the larger group and other suggestions are solicited.</td>
</tr>
</tbody>
</table>

On the following pages, you will see how her agenda is utilized.
Meeting Two - The Successful Meeting

Analysis of the helpful techniques used by the President/facilitator to keep the group on track and focused during the second meeting (on the video) of the Daycare Association.

**Technique 1.** The facilitator gets agreement on the content focus of the meeting.

<table>
<thead>
<tr>
<th>President:</th>
<th>But he did request that we put together a list of daycare center problems as we seem them. So who wants to begin?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ms. Wilson:</td>
<td>Wait a minute! I thought we were having this meeting to talk about more curriculum for the center.</td>
</tr>
<tr>
<td>Mr. Wong:</td>
<td>Well, I think we need to talk about problems — particularly the problem of violence.</td>
</tr>
<tr>
<td>President:</td>
<td>Before we go any further, I think we need to get agreement on the focus of the meeting. Both the lack of curriculum in the school and violence among the children are potential items on a list of daycare center problems.</td>
</tr>
<tr>
<td></td>
<td>Before we focus in on any one problem, though, I think we should work on this list. But this is your meeting. So who thinks we should work on the list?</td>
</tr>
<tr>
<td></td>
<td>Great. So we agree.</td>
</tr>
</tbody>
</table>

She helps participants who come with different expectations see how their content items (i.e. specific daycare problems) are related to the task she has suggested (developing a list of daycare problems). She also uses this opportunity to get agreement from the group that this is a task they all want to focus on.
Technique 2. The facilitator gets agreement on a process focus.

President: At this point, I’d like to suggest that we use brainstorming to develop this list. Are there any objections?

Okay. We will list every suggestion made and we won’t spend any time evaluating the suggestions. We’re looking for a list. We’ll have time to evaluate and, perhaps, prioritize the items after we have our list. Are there any questions?

Alright, who wants to give me the first item for our list?

As soon as the President gets agreement on a CONTENT focus, she moves to get agreement on a PROCESS focus, or how the group will develop the list. A quick scan of the group confirms that her suggestion of using brainstorming has the group’s approval. Then, she carefully outlines the guidelines for brainstorming and asks for questions. When none are asked, she gets the process started by requesting the first item for the list.

Technique 3. The facilitator provides positive reinforcement when participants contribute appropriately.

Ms. Wilson: What I said before. The school doesn’t have any real curriculum. And I have some ideas about what our kids should be learning. . . .

. . . but I know we’re going to talk about the solutions later.

President: Terrific! And if that is prioritized as the most important problem, I’m sure we’ll be eager to hear your suggestions. Any other items?

The president acknowledges and reinforces appropriate behavior.
Designing Successful Meetings

Technique 4. The facilitator acts like the conductor of a symphony orchestra reminding participants about the meeting focus (both content and process) and giving direction about how they can participate appropriately.

| Mr. Wong:       | Violence. Too much violence. |
| Ms. Wilson:     | Violence? What you need is more daycare assistants. |
| President:      | Remember, Ms. Wilson, we’re not into solutions just yet. Do you have an item for our list? |
| Ms. Brown:      | My Johnny came home with a bloody nose just last week! |
| President:      | That is a good – if rather extreme and graphic – example of violence, but we don’t want to spend any brainstorming time discussing any one item. That’s for after we have our list. Does anyone have another item? |

These are two examples of situations that often sidetrack a meeting. In the first, Ms. Wilson attempts to give a solution for the problem of violence. This premature jumping from the problem to the solution is one of the most common “problems” in meetings. Not only does it change the PROCESS focus from brainstorming to solving, it also changes the CONTENT from a general list of problems to a specific problem.

This is particularly dangerous because the specific problem the group is focusing on may not be a top priority and precious meeting time will be spent trying to resolve it. If the group focuses on developing the list of daycare center problems, and perhaps prioritizes the items at the next step, they may have a better understanding and agreement about what the most critical problems of the center are. This agreement will be invaluable as they build the motivation to move toward developing plans to address their problems.

In the second example, Ms. Brown gives an example of violence to support Mr. Wong’s listing of the item. This President does not want to waste brainstorming time talking about any one item. Once she allows this to happen, participants will want to discuss the merits of other items on the list.

In both situations, the President tactfully informs the participants about what they are doing incorrectly and she recommends an appropriate way they can be involved in the process.
Technique 5. The facilitator makes process suggestions, but she realizes that the group must approve the direction she has recommended.

President: Well, we have quite a list here and now I’d like to recommend we discuss each item and try to prioritize the list. In fact, if we have time, it may be helpful to the preschool Director if we take the top two or three items and brainstorm some solutions. But these are only recommendations – what do you want to do?

Here the President gives the group a glimpse of how they might process the list with the time they have left in the meeting. She realizes that these are just PROCESS suggestions and the group needs to decide what is the most appropriate way to proceed. For instance, rather than prioritizing the list of problems, they may want to send the entire list to the preschool Director.

To have an idea of PROCESS suggestions the facilitator will make during a meeting, she must do her homework before the meeting and be very clear about what are desired outcomes. Before the meeting, she discovers the desired outcomes by talking to the person or group who has scheduled the meeting. In many instances, part of her responsibility during this pre-meeting assessment is to help the meeting organizers get clarity on exactly what they want to accomplish. Many meetings are frustratingly unproductive because the people who organize them are unclear, at the beginning, about what they want to accomplish.
Here are some examples of outcomes (CONTENT) desired by organizers of meetings and suggested PROCESSES the facilitator may use to achieve them.

<table>
<thead>
<tr>
<th>Desired Outcomes (Content)</th>
<th>Suggested Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Get information or advice</td>
<td>Discuss, List, Brainstorm</td>
</tr>
<tr>
<td>Give information</td>
<td>Lecture, Report</td>
</tr>
<tr>
<td>Problem solving or decision making</td>
<td>Discuss, Organize, Prioritize, Evaluate</td>
</tr>
<tr>
<td>Resolve conflict</td>
<td>Clarify perceptions and definitions, Analyze</td>
</tr>
<tr>
<td>Planning and goal setting</td>
<td>Suggest, Organize, Prioritize, Evaluate</td>
</tr>
<tr>
<td>Improve interpersonal relationships/communication</td>
<td>Socializing and Eating</td>
</tr>
</tbody>
</table>

During the meeting, the facilitator also has to have the flexibility to make changes if the group wants to move in another direction; she always remembers it is the participant's meeting.
MEETING PROBLEMS

The exercise below has been provided so that you can practice what you have learned about the importance of establishing a CONTENT focus and PROCESS focus. Though the CONTENT (common meeting problems) has been assigned, your group has to determine the PROCESS it will use to develop the list.

Exercise

In groups of three, take about 10 minutes to list 15 things that commonly go wrong in meetings. Think about some of the meetings you have attended. What were some of the problems your group experienced?

Common meeting problems:

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Designing Successful Meetings

Exercise

Each group now has a list of about 15 common meeting problems. During this demonstration meeting, the groups are going to develop a collective list of 30 items recognizing the importance of achieving a common CONTENT focus and PROCESS focus.

Agenda for the Demonstration Meeting

<table>
<thead>
<tr>
<th>Content:</th>
<th>Collective List of Meeting Problems</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process:</td>
<td></td>
</tr>
<tr>
<td>Time (Allocation):</td>
<td>8 minutes</td>
</tr>
<tr>
<td>Objective:</td>
<td>30 items</td>
</tr>
</tbody>
</table>

On the agenda, the groups have been given a CONTENT focus (WHAT they are going to discuss), allocation of time and objective.

They still need to decide on the PROCESS they will utilize to develop their collective list. To do this, participants can suggest different processes they can use to generate the “Collective List.”

Two common suggestions are:

1. Start with the first group and let them give all the items on their list. The remaining groups will delete duplicate items from their lists and then take turns adding new items to the collective list.

2. Take the top one, two or three items (depending on the number of groups you have) from each group in turn until all lists are depleted. While a group waits for its turn, it will be deleting duplicate items already listed.

While both processes will result in a “Collective List of Meeting Problems,” think about the impact of both on the participants. In the first process, by the time you get to the last groups their ideas are frequently all listed (particularly if you have a number of groups). Have you acknowledged their efforts in generating their list? This is an important consideration if one of your desired outcomes is to increase participation by creating a safe, legitimizing environment. Therefore, before a process is selected, the facilitator must acknowledge the desired outcomes given the group's content focus.
Process Analysis of a Meeting

If you want to improve your meetings, you must spend time evaluating what worked and what needed to be changed. Effective evaluation occurs in a timely manner—preferably the end of the meeting—and needs to be structured to be useful.

Evaluation can be positive. This is not what many of us have experienced and that is why we resist evaluating our meetings. To set a positive tone for your evaluation, start by asking participants what they “liked about the meeting.” These are suggestions which can be used in designing future meetings. To continue in a positive vein, ask “what could have been better?” This perspective gets participants thinking constructively about how they can design a more successful meeting and is far less threatening to meeting organizers.

This is an example of what you can say when evaluating your meeting:

+ “First, say what you liked about the meeting. Try to point out specific behaviors of the meeting organizers or participants that worked. Ask yourself, ‘What went well?’”

Δ “Then, say what you think the group could have changed to be more productive. How could the meeting have been improved? What could the group do differently the next time? Ask yourself, ‘What could have been better?’”
Designing Successful Meetings

ADDITIONAL RESOURCES:


Some of the material presented in this text was developed by Interaction Associates, Inc. It was adapted by Donna Ching with permission from George Long and Donn Hatcher.

If you want to know more about the Interaction Method, you can write Interaction Associates, Inc., 185 Berry Street, Suite 150, China Basin, San Francisco 94107 or call at (415) 241-8000.

Sources:


