Technical Meetings as a Means of Internal Communication*

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In these days when every form of internal communications is receiving careful management scrutiny, we often hear the question: "Why so many meetings?" Indeed, "Why meetings at all?" This paper will attempt to answer these questions, largely by a description of the types of and reasons for internal technical meetings of Esso Research and Engineering Co.

Actually, the personal contacts afforded are the major advantages of meetings, as opposed solely to written communication. Questions can be asked when points are not clear, and can be answered with the latest data available. Decisions can be made on the spot that really require the concurrence of the individuals involved. There is the chance for cross-fertilization of ideas from people from various areas of work.

Another factor of considerable importance is the satisfaction afforded to the author—the prestige of presenting his work before a live audience in whom he can see immediate recognition or acceptance of at least some of his ideas.

Types of Internal Meetings.—In most companies, there are two types of internal meetings. The first, and perhaps the most familiar to the general public, is the sales or promotional meeting, where wives and families accompany those attending, considerable advance publicity is given to the occasion, and there is, in general, an atmosphere of entertainment rather than business. This type of meeting will not be considered here. We are concerned, in this paper, with *technical* internal meetings.

At Esso Research, these technical meetings, in turn, can be divided into several groups according to size, attendance makeup, and general purpose. The first type we might consider is the "symposium" or seminar, with an attendance of perhaps 20 to 25 people. This rarely has a formal program, and comes close to being a discussion group. Topics considered are generally quite theoretical, such as "mixing and separating," "distillation," and "gas chromatography." Consultants are usually invited, and there is free exchange of ideas. These meetings are best carried out in a remote, private location where there are all possible comforts for the attendees but few telephone contacts and minimum attention to leisure-time entertainment. Such meetings are usually short (2–3 days), and non-program time is taken up with continuing, informal discussions. The atmosphere is much like that of a Gordon Research Conference.

A second type of internal meeting is one that covers a very highly specialized *operating* field. An example would be a meeting of pilot-plant operators, or those meetings which in our organization are referred to as "forums"—for example, "electrical forums," in which our engineers and the foremen from various refineries get together to discuss existing problems and new methods and equipment. These are best conducted at the operations site, *e.g.*, in the laboratory or plant. Attendance may not be much more than that a symposium, or it may rise to as many as 40 to 50 people. Unlike the symposia, the program is usually rather well formalized, and an inspection tour or an opportunity to look at some new equipment in the field is also included. The purpose of these forums is to bring together people with similar problems in specific operations areas. Practical aspects are the main ones that are covered.

An additional special-field type of meeting, but one which covers a larger segment of company technical people, is that which covers new technical developments of a research or development nature: for example, analytical, mathematical, or refining studies. As a rule, these meetings have formal programs. All phases of the particular field may be covered, from theoretical to practical. These are larger meetings, ranging up to 100 or more attendees. Since there is a formal program, and since some leisure time is therefore scheduled, these meetings are usually held at a resort type site. Attendance includes people from all areas of company operations in the field involved, and here the time for free discussion, the cross-fertilization principle, begins to show its real value. Visual aids are used freely, and a public-address system is desirable to take care of discussion from the floor. Since the results of these meetings may influence policy decisions in future operations, attendance usually includes people from the middle-high level of management.

Another type of internal meeting used by Esso Research is the large-scale meeting covering all phases of Company operations. Attendance may reach 400 to 500 people in the aggregate, perhaps half that number at any given session. To obtain the desired benefits, requisites include a large resort area site, a highly formalized program, advance registration, arrangements for transportation, the use of name-badges, *etc.* Extensive use is made of visual aids and of a public-address system for floor discussion; typical auditorium arrangement is shown in Fig. 1. The time of each presentation and of the discussion is strictly controlled by the chairman. a timing console such as that in Fig. 2, tied electronically to the speakers rostrum, Fig. 3, is very helpful in keeping the meeting on schedule. The discussions and certain talks by members of management are recorded and stored for future use.

Leisure time for discussions and for some sports, such as golf, tennis, or fishing, is worked carefully into the over-all program. In the case of an Esso meeting of this type, attendance is world-wide and includes the highest levels of management. These large-scale meetings are held for review and projection of research, development, and engineering programs, to aid in policy decisions for the future.

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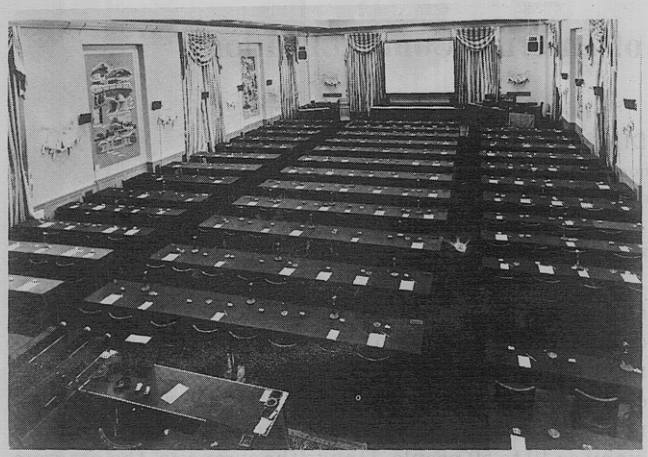

Fig. 1

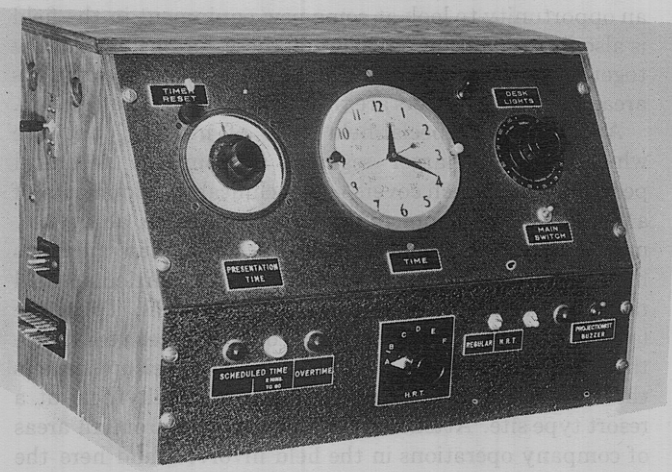

Fig. 2

Fig. 3

Planning.—Regardless of the size or scope of the meeting, advance planning is the key to success. In a large organization, of course, the first step is to plan the calendar for the entire year, to avoid conflict of dates for meetings where there is an overlap of subject matter. The second—very important—step is to select suitable sites. Desirability of a site, of course, depends upon the type of meeting—a remote, private area for the small symposium, with little consideration to sports or leisure-time activities; a plant auditorium or conference room for the operators' meeting, with a banquet to close the meeting and to give some opportunity for "socializing;" and, finally, the resort type of meeting site (a large hotel or similar place) for groups of 100 or more.

For the large meeting, the size of the meeting room available and the capacity of the hotel for overnight accommodations usually combine with total cost (including travelling) to determine the hotel to be chosen. As mentioned, it is desirable to be able to schedule golf, fishing, hiking, or some other leisure-time activity, preferably in the fresh air. One can easily become supersaturated with technical information, especially after being in a closed area for seven or eight hours a day. However, there should not be too much opportunity for the group to disperse, particularly in the evening hours. Good food and some planned evening entertainment (such as new feature films) are essential at large-group meetings. Privacy is also important. A meeting room that can be completely closed off from the public areas of the hotel is mandatory, as is a private dining room or at least a secluded part of the public dining room.

In choosing the site for large meetings, transportation costs must be considered as well as hotel costs; the geographical makeup of meeting attendance is often a significant factor. This point will be developed further later in this paper.

Meeting services are another important feature of a successful meeting. For the small meeting, little or no special-staff service is required, with the exception, perhaps, of a graphic-aids projectionist. For the larger meetings, the size and activities of the necessary staff are both larger and more complex. Projectionists, public-address technicians, secretarial services, and assistance in transportation planning (especially for overseas visitors) become increasingly important. When top management attends the meetings, it also becomes necessary to make available phone contacts with other company operations.

Publications.—Meeting publications vary and in many cases may be changed as the tenor of the meeting changes with time. A program is always advisable, in varying degrees of formality. In some cases, summaries of talks to be presented may be issued prior to the meetings.

A new type of publication with which we have experimented at Esso includes a 150–200 word abstract with prints of all slides used in each presentation. This has met with considerable approval at a large technical meeting.

Some groups tie regularly-scheduled meetings into their written reporting systems, and issue full-scale reports as support for the much-less-detailed talks. These have the virtue of forcing the detailed summation of major programs, for the record as well as current use. From the meeting viewpoint, however, this sort of publication has been criticized in that by the time the full report is written the information may well be stale.

Another type of meetings' publication is the formal "Minutes of the Meeting," which may be taken down either by secretaries or by tape recorders, then transcribed and edited afterwards. These may be distributed to those attending the meeting or simply held for reference. Records or tapes of floor discussion may be held without transcription, to be written up on request after the meeting.

Costs.—The question of meeting costs—how much to spend for value received—is a hard one to discuss briefly. The necessary size of the meeting and what it is intended

to accomplish all influence what one may safely spend. The worth of a meeting can't be calculated readily, since its benefits are not always concrete.

At Esso Research we have found it least expensive to to use a small company-owned meeting site, but this use is strictly limited by its size and more-spartan facilities. Resort areas are more expensive, of course, but one should consider the possibility of using them in their off-seasons.

As mentioned, hotel costs must be balanced against transportation costs. What may seem to be a good "package deal" from a hotel can be cancelled out by high transportation costs for a majority of the attendees. The use of a convention booking service, one that maintains files on the size and facilities of a variety of hotels and resorts, can be helpful. Hotel chains frequently have salesmen who specialize in convention business and can provide information as to their own hotels' facilities. A file of brochures on types of hotels in various locations is useful. Those on meeting-arrangements staffs should be always alert in their own travels for suitable areas for company meetings.

Staff.—Meetings operations are a highly specialized type of activity, and there are a great many tricks of the trade to be learned. The meetings staff must often guide the chairman of a given meeting without letting him know it. They must be vigilant to keep each meeting out of the many pitfalls that threaten, for if a meeting is not successful the meetings staff will be blamed, not the chairman. At a meeting, one must be prepared for any and all eventualities, especially at a meeting held at a non-company site, bearing in mind that McGurk's law: "Any improbable event which would create maximum confusion if it did occur—will occur," is always operative in meeting activities.

Despite this need for planning, attention to pre-meeting details, and eternal vigilance during the meetings, the activities of the meeting-organizing group must be largely behind the scenes, guiding and assisting but rarely intruding into the meeting program itself, except in emergencies. The smoothest-running meeting is that in which the "operations" are least obvious.

Know-how about Company programs and "know-who" about Company people are minimum requirements for company-meeting managers. These must be coupled with tact, friendliness, and ability to meet emergencies calmly, be they real or imagined.

Face-to-face communication is said to be the best method for transmitting information. Well-planned meetings which allow adequate time for both formal and informal discussion closely approximate this face-to-face method, and have other advantages. In this era of close attention to costs, care must be taken to balance unit and total meeting costs against real benefits, but most companies that use technical meetings continue to find them a prime means of internal communications.

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Some Personnel Problems of a Small Indexing Project*

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The abstracting and indexing of the scientific and technical literature can be and is being carried out by a variety of individuals, differing greatly from each other in their backgrounds and qualifications.

The reference librarian, trained primarily in the field of Library Science, is usually saddled with the onerous responsibility of indexing, annotating and even abstracting articles of interest as they come across the library desk. Many of these individuals possess a good scientific background and are well-qualified to perform this important function. On the other hand, many do not and are obliged to pick up whatever scientific subject matter they can in a rather disorganized, haphazard manner. In spite of this serious handicap, it is possible for them to prepare fairly good abstracts, particularly of the indicative type, and to index the subject matter at least in a superficial manner. Thus, they perform a valuable function in screening the large volume of pertinent scientific and technical writings, thereby freeing the laboratory scientist for his more highly specialized professional functions.

It has been the experience of many groups, however, that if highly detailed informative abstracts are desired, or "indexing in depth" is necessary, individuals with a great deal of formal scientific background must be recruited and employed. Thus, the "literature scientist," a fully competent chemist, physicist or biologist, has come into his own. The chemical industry as a whole has been a pioneer in the development of this new profession. The pharmaceutical sector of this industry, with its voluminous and highly specialized information requirements, has, by and large, supplied the proper intellectual climate in which the practitioners of this new profession might flourish.

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