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From Minutes of Meeting to ‘Memories of Meeting’

How we designed impactful and engaging Visual MoM for Client Visit

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Abstract. Meetings in a business context are organized for a wide range of purposes and with varying contexts. Minutes of Meeting, are a good tool for capturing the formal discussions, but fail to capture finer details. Recognizing this limitation, Tata Consultancy Services (TCS) decided to use an innovative visual note-taking approach to capture a client visit. The objective was to have a single graphic encapsulate the events across all days of the visit, to ensure a good client recall and create a lasting impact.

Keywords. New Work Methodology, Design thinking, Visual Meetings, Sketch Notes, Doodling, Graphic Recording, Visual Listening, Collaboration Tool, Client Engagement, Customer Relationship, Visualization technique.

1 Introduction

Tata Consultancy Services (TCS) is a leading IT Services company based out of India providing IT and business solutions to global clients. Client engagement is an extremely important part of the business for TCS. An international client’s top management was visiting India for four days to discuss TCS’s capabilities in the space of Digital Re-imagination. From TCS’s perspective, the visit was an opportunity to demonstrate capabilities to strengthen and grow the client-TCS relationship. Given the importance of the client, the business unit was keen on innovative approaches for creating greater impact. The User Experience (UX) team was thus approached. It was decided that a Visual MoM would greatly complement the standard Minutes of Meeting.

This approach to visual note-taking would entail a Graphic Recorder (GR), observe the events from the entire client visit. The idea was to switch from the conventional who-said-what, towards an event-capturing approach.

The intent of the graphic was to seize not only what happens in the meeting room, but also the experiences and memories of the client during their trip to the country. ‘Memories of Meeting’ would add a sense of personal touch as opposed to pure data capturing associated with Minutes of Meeting. The final output would be a printed Graphic- presented as a souvenir. This would remain with the clients as memories of their visit, and serve well for continued customer engagement.

2 Preparation Prior to the Meeting

The meeting was spread across four days at various TCS offices across the country. A week before this, following preparation was done-

2.1 Preparatory Work

Even though most of the information for the graphic was to be gathered real-time, the GR did considerable prior preparation.

1. GR connected with the cross-located TCS teams to understand the purpose of the visit, client's background and also TCS capability to be showcased.
2. GR got an understanding of the key interest areas for the client. The client had operations in 100+ countries and the business focus was on continuous, reliable and sustainable performance.
3. Cultural aspects- GR tried to ensure that the graphic was sensitive to the cultural nuances of the client.
4. The method finalized for creating the visual- Sketch during the meeting, validate the visuals with stakeholders and finally print the digitized output.

2.2 Key Decisions for the GR

Mood: The GR decided to limit dry facts and numbers in the graphic. That information was to be reserved for accompanying business documents. The Visual MoM had to look lively yet corporate; personalized yet professional.

Layout and Illustrations: All four days had to be captured in one visual. Since a four-column layout would have been linear and somewhat rigid, the layout was divided into four quadrants, placing agenda center stage. A cyclic structure also emphasized the clients' round trip to India. All illustrations were hand-drawn on paper then digitized, set against a white canvas, for a good contrast.

Color Palette: Brand Identity colors of TCS (Blue) and its Client (Red), with Yellow accents for highlights were used. The interaction between the two organizations is depicted using these colors. The GR was aware that color semantics can greatly impact viewer's expectations, hence mindful while using the same.

Tools: For quick and efficient capturing of moments, GR had to use basic pen, paper and markers for creating the first draft of the Visual MoMs. Final graphic was created using HP inkjet scanner and printer, Adobe Photoshop, Wacom Pen tablet.

3 The Meetings

Day 1-Gandhinagar: This was an orientation session, showcasing overall TCS capabilities to the Client. The Client met the offshore team for the first time in person. This was the beginning of recording the key events of the client trip.

Day 2-Mumbai: TCS showcased its round the clock support to the onsite tech team. The GR sketched throughout- even during the meals and break times. This enabled GR to capture casual moments of the meeting as well. Indian food was frequently discussed. Including the same in the illustration, provided the necessary personal touch and increased recall at a later date for the client.

Day 3-Chennai: Technological capabilities were showcased in TCS labs. Capturing this was important for future client reference. Many casual topics were interspersed to increase the recall. For e.g. dramatic weather differences across India, an active topic of discussion, was included to make the graphic more detailed and personal.

Day 4-Mumbai: The closing discussion focused on the roadmap of the visit. At this point the client expected a recap of the points to take home. Again, keeping the formal and casual mix of the illustration, the GR captured the technical projects that were discussed along with the casual conversation like beverage preferences.

Wrap-Up: Post completion of the client visit, the GR set about collating the illustrations created during the course of the four days. Post collation and review by the business team, the illustrations were digitized. A high quality A3 sized print out of the Visual MoM was presented to each client, on their return to home country.

4 Challenges and Learnings

- **Groundwork:** Advance preparation ensured that during the actual meeting, focus was on understanding the happenings and translating them to visuals. Time spent prior on learning the basics of technical and business aspects was crucial.
- **Data Validation:** As a designer, the GR was not well versed with the technical aspects and the Client's business. Teaming up with stakeholders who understood the topics at hand well thus became very important.
- **Time Constraint:** GR had to work very fast to keep pace with the meeting schedule. There was limited time to experiment. Hence, an iterative approach with regular feedback had to be adopted. This saved significant rework in case of changes.
- **Voluminous Data:** There was a lot of collated data from the four day visit. Data refinement is a time consuming yet important activity, so as to have a crisp mean-

