

Document & Debate Culture

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Tenets

1. Clear thinking results in clear execution.
2. The process of writing brings clarity.
3. Time spent writing is valuable work.
4. Documents are tools to communicate and debate.
5. Debate is respectful and productive, and feedback is essential for success.

Description

“The traditional kind of corporate meeting starts with a presentation. Somebody gets up in front of the room and presents with a PowerPoint presentation, some type of slide show. In our view you get very little information, you get bullet points. This is easy for the presenter, but difficult for the audience. And so instead, all of our meetings are structured around a 6-page narrative memo.... If you have a traditional ppt presentation, executives interrupt. If you read the whole 6-page memo, on page 2 you have a question but on page 4 that question is answered.” -Jeff Bezos on why Amazon begins all of their meetings with 6-page narratives and why he believes, what I am calling the ‘Document and Debate Culture’, helps his company run better.

The Document & Debate Culture helps individuals and organizations think well. Good thinking is accomplished through writing, debating, revising, feedback, and rewriting. Following this process will result in better thoughts, which produce better plans. Better plans create better actions. Eventually better actions deliver better results.

The project management community has been doing things generally the same for decades. There have been improvements due to a focus on project management as a profession and improved training opportunities, however, there has not been a significant increase in overall project success trend since 2006 when measurement was started. According to PMI’s Pulse of the Profession Study, the overall project success rate was 62% in 2016. What can be done to increase successful business outcomes? The implementation of the Document and Debate Culture has the potential to increase project success rates significantly.

Over the last year, the Education Technology department at Western Governors University has adopted a Document and Debate Culture. In that time, we have developed a clear 5-year strategic plan, prioritized a detailed 1-year plan, and have clear direction of our overall vision, as well as a detailed understanding of our major initiatives. These did not exist previously. We have said no to projects that don’t align to our strategy. We have said yes to projects that we understand and are able to implement with current resources. The Document and Debate Culture has made these deliverables possible with feedback from within the department and collaboration across the university. This was hard. It took countless hours. It is still out of the team’s comfort zone. It has changed the way we do everything. But it has been worth it as we pursue our audacious goal of revolutionizing education.

The ideas developed through the Document and Debate Culture can be projects, strategies, processes, statuses, deliverables, goals, etc. – anything that is benefited by good thinking. For this document, I will focus on Document and Debate Culture as a tool to empower good project management.

“Good writing is the actual accomplishment and physical embodiment of clear thinking and strong analysis. Good writing is good thinking” says Doug Hartman and Chris Uggen in the article Good Writing and Good Thinking. Good writing is difficult. The process of writing documents produce clarity. It takes time and effort to create clear messages to readers that have different experiences and insights from the writer. Writing down thoughts helps think through and define what the message is. A well written document communicates the same message to everyone. The writing should be concise and eliminate confusion brought on by other forms of communication such as verbal conversations, quickly crafted email, and bullet points on a PowerPoint slide. The written document should stand on its own. By reading the document, someone should be able to have a good enough background to discuss the issue, ask questions, and have opinions about the issue.

A first draft is not the final draft. Rarely, if ever, will the first draft of your document be complete. The writing is not supposed to be perfect. Writing is a tool meant as a starting place and developed over the life of the idea. Do not be discouraged as you revise further drafts. That is how it is supposed to be to lay the foundation for good thinking.

Once the document is written, it should be reviewed with stakeholders. It is better to have directly involved stakeholders review the writing, however, if the document is able to stand on its own, anyone should be able to provide feedback.

Reviewing documents take a significant amount of time. Time is one of the most difficult challenges in the business world. Some leaders are triple booked for meetings and availability is hard to come by, especially in projects that have significant stakeholders. The stakeholder must understand the importance of being a part of this process. Stakeholder insight and alignment is needed for this process to be successful. As the organization matures with the Document and Debate Culture, it will be easier to set standard review meetings. Because the participants will be familiar with the process, it will be easier and quicker to do.

A review starts by reading. There are no introductions or explanations. Reading continues until everyone in the group is done reading. Readers will often make notes of questions, issues, or corrections they have on the document as a reference later. When everyone is done, there is a page by page review where questions, issues, or corrections are brought up and discussed.

Debate begins. The questions and issues brought up during debate help the writer understand how the message is communicated. It can reveal blind spots in knowledge. There may be mistaken assumptions. It can expose disagreements in the group that need to be addressed before moving on to the next stages of the project. It is better to resolve these issues earlier. The writer may accept the feedback or not, however, it would be foolish to ignore the feedback.

As we implemented the Document and Debate Culture, there was a significant technical project we had already started working on. We decided to go back through this new process to make sure everyone was on the same page. As we wrote the document of what we hoped to accomplish with the new platform, it became apparent that we disagreed what the new platform should accomplish between ourselves. So, we debated and brought the group into alignment. When we began collaborating with the business and shared our document with them, we realized they had different ideas of what the platform should do as well. We took the opportunity to discuss and clarify the deliverables with them over many meetings. The result was well-defined platform requirements that were very different than

what we thought the project originally was. If we hadn't spent the time to discuss and get things right before we started execution, we would have failed – or succeeded at the wrong thing.

At some point, whether by agreement that everyone is on the same page, or by the constraints of a deadline, the ideas should move toward action. If there are updates to the scope of the project, the document should be revised. If anything has fundamentally changed, the document should be revised. To not update the document, would invalidate all the work done previously.

The time spent writing, editing, rewriting, sharing, receiving feedback, presenting, and rewriting, lead to better thinking. Taking the time to think right will save time, product higher quality results, ensure you are working on the right things, reduce costs, and increase your project success rate.

Writing Tenets

Documents should start with tenets. A tent is a principle or belief. Tenets set the stage for a document. Tenets provide a standard to judge your document and your actions. The tenets should give insight into how you are thinking about the project. What are you considering. What is the most important thing you are considering. Defining these core principles up front, helps to understand the background and establishes the rules for the project. The tenets should be listed in order of prioritization. Tenets will help you make decisions in the future. What are the things you will not do without difficult discussions?

We found that the tenet discussion was incredibly enlightening. We often spent more time on the tenets than the narrative. Having the tenets right helped us keep on track when it came to writing documents and debating.

Challenges

Implementing the Document and Debate Culture is challenging. Here are common challenges that need to be addressed to be successful. All of these challenges can be overcome however, it requires patience and deliberate leadership.

Writing Skills - Many people haven't written at a proficient level since they were in school, if then. Writers should take every chance they can to write business documents. Writers should be challenged repeatedly by leaders and other stakeholders in the review, on the depth of the subject. Because they know they will be challenged and critiqued, writers will learn to be more detailed and complete in their writing. If a lack of depth is not challenged, it will promote a cursory review of the topic. Being overly critical will help build good habits of having the appropriate level of detail and explanation about the project.

As we built out the Document and Debate Culture at WGU, writers were repeatedly challenged to go deeper, to define their ideas more clearly. They were often frustrated at the rewrites and the challenges to their writing. It took several months, but eventually the writers learned to challenge themselves and their writing skills improved.

Debate - Feedback should always be sought after. Debate is an effective tool for getting feedback. Input from varied sources produces the best results. The document can serve as a standard reference for debate. The document provides a specific issue to agree or disagree with rather than generalities. Through respectful, constructive debate issues can be uncovered. Disagreements are focused on specific issues rather than personalities.

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Debate tends to bring up visions of right and wrong, winning and losing. Traditional views of debate are not helpful in the Document and Debate Culture. To be valuable, this debate should be done with the perspective of how we make the idea the best it can be.

Debate wasn't something that most people were comfortable with as we went through our cultural transition. Feedback and disagreement were seen as negative. If you disagreed in a meeting, animosity could grow. Challenges were taken personally. It took intentional effort to make disagreeing a positive. We would praise stakeholders who disagreed. Because of the debate, we ended up with better ideas.

Alignment - At the conclusion of the document and debate process a clear plan is set forth. The feedback may or may not be incorporated into the document. The responsible person owns the plan (within organizational authority) and specific decisions, recognizing the impact those decisions have on others. Stakeholders should clearly understand the path forward.

Writing stories - The world, and the workplace are centered around short, quick communications. Tweets, emojis, and cyber slang have taken the place of written prose. One of the challenges of the Document and Debate Culture is that most people across all industries, are experiencing degradation of writing complete thoughts. Part of the issue is that learning to write is so labor intensive and takes dedicated time to perfect. Another is that our society communicates formally less often. Reviewing the writing with others, providing feedback, rewriting, and continuously seeking to improve will help communicate a clear story.

Giving/receiving feedback - Feedback is a gift. Feedback is the way things get better. We are able to see things that we couldn't see before. However, it is hard for people to accept feedback, especially if it is something they care passionately about. The goal is to make the idea better. There should be no concept of winning or losing. The person writing the idea must be willing to bend if feedback is given that helps the idea become better.

Time - "Time doesn't come from nowhere. This way you know everyone has the time. The author gets the nice warm feeling of seeing their hard work being read", Says Conor Neill in *Amazon Staff Meetings: No PowerPoint*. The information is fresh. Questions and comments are fresh in people's minds. Many times, a document is sent out early to read and the audience never gets to actually reading it because of more urgent priorities. The time spent reading is less than having an ineffective meeting or not communicating clearly. Take the time and do it right.

Scheduling – It is hard to get the right people in the room. Stakeholders and leaders are often double, and triple booked, for entire days. It is critical to have the key stakeholders participate in the review and share their ideas, express their concerns, and give their support. Setting up standard times for reviews helps create predictability. In the end, if the right people can't be at the review, it should be postponed.

Silence - Review meetings begin with reading. The silence of a group of people reading can be nerve wracking for some. There is a temptation to comment or explain things at the beginning. Don't do it. Good habits will form soon enough.

One of our first experiences with reading was with a group of executives. The writer opened with several comments of explanation. The leader of the group stopped the document owner and said that

we should simply read. The document needed to stand on its own. It was uncomfortable, but the message was received.

How to Create the Culture

Implementing a Document and Debate Culture is difficult. It takes time for the team to develop the skills and become comfortable with the process. It will seem tedious. It will take a lot of time that people are not used to using sitting in meetings talking about things (and seemingly not doing anything). It will take a lot of paper – trees will be killed.

Write and write more

To become a master at a particular skill, it is said to require 10,000 hours of practice. That may be more time than you can afford in the work day, however, the point is that the more you can practice, the better you will get. Every opportunity to practice writing should be taken. Write, revise, and repeat.

Meet to debate

Similarly, debate without the emotion, or win/lose attitude, is something that needs to be developed. The only way to improve is to debate. It has to be a safe environment where offense is not given or taken. However, there will often be offensive things said or taken. By practicing, the environment becomes comfortable enough where things are given and received in a way that is seen as constructive feedback, rather than someone being right or wrong. It helps to have an experienced leader or an evangelist of the practice to keep things non-threatening.

Evangelize for Synergy – Because collaboration across different groups is important for successfully implementing Document and Debate Culture, it is important to train the other groups and help them understand the objectives. Knowing what is expected of them, will help get the outcomes you need. Invite them to watch other reviews. Hold formal trainings where they can ask questions. They may not use these tools in their group, but they will be able to work more effectively with your group when they do use it.

Documents

Documents can be used in any situation. If good documents are reflective of good thinking, the more it can be done, the better. Practice in emails or short updates. However, there are types of documents that have shown to be particularly effective in demonstrating clear thinking and being valuable in delivering results.

6 Page Narrative – The 6-page narrative describes an idea in detail. It tells the story of your project. Why are you doing it? Who is going to do it? What is the objective? Are there risks or mitigating factors? In traditional project management methods, this would be a type of project charter.

1 Page Summary – An executive summary is similar to the 6-page narrative; however, it is limited to 1-2 pages and provides highlights without so much detail. This increases the likelihood of leaders reading it because of the compressed timeline. It also includes high level information since the details would not be pertinent to executives. Items included should be status of the project for a specific date, with some details about successes, misses, risks, or other details that tell the story. You can also include the status of the next milestone with similar information.

Press Release – A press release looks at the project from a future point of view. The project is complete. You are announcing it to the public. What would make the project notable for the public? What is the difference from the current state. What are the major accomplishments. This creative process helps drive clarity around the deliverables of the project.

FAQ – Frequently Asked Questions accompany other documents such as the 6-page narrative. The format is question and answer. The additional document allows for more detail around common questions that you expect could come up. It helps the writer think through questions that may come up and have an answer. It saves the audience from asking these questions on their own. The level of detail and number of questions is determined by the individual project.

Appendix – Includes data, examples, and supporting documentation. The appendix is unlimited in length. The purpose is to provide any background information that may be needed. Anything that provides more information about the project but is not concise enough to fit in the main body of the document can be included. The document should stand on its own, and that includes the information in the appendix.

Goals – Although short, goals can take advantage of the Document and Debate Culture. Clearly defining goals set the team up for success. This helps make sure everyone understands the goals before work on them starts. It increases the likelihood of accomplishing them. Goals should be written to stand on their own by stating a starting state, future state, and target date. Goal updates can be given in the same manner they were written; clearly and concisely.

Tips for writing

Concise – Words matter. It is important to use the correct words, and only the correct words, that convey the correct message. Being concise keeps extraneous information from distracting from the message or confusing the readers. Flowery or overly descriptive words and statements, while potentially more interesting to read, can provide more opportunity to misunderstand the writers content. Additionally, being concise requires very focused thinking. The document must be edited, often many times, to make the intent clear.

Agree on format (font, margins, etc.) – As you write, it helps to use a standard format. This helps readers quickly focus on the ideas in the document. The readers have seen similar documents and they know what is expected. Key factors to be aware of in formatting include font type, font size, margins, titles. The specifics aren't as important as that they are standardized. However, decide within your organization what the standard will be, and stick with it.

Tell story – Despite a focus on writing a concise message, it is important to tell a compelling story of the ideas being expressed. This provides background of the issues and provides information that will help the reader have the needed information to ask questions and have an opinion. There is a difference between thinking in bullet points and thinking in narrative. Time should be taken to make these documents narratives.