

# FACILITATING A SUCCESSFUL ONLINE MEETING OR WORKSHOP

Good online facilitation online means you need to juggle people, process and technology to get desired outcomes. But you can build on the facilitation skills you already have and simply modify or add to them for a successful digital experience.

At Lean Agility we have found that by considering people, process and technology in the before, during and after phases of your meeting or workshop, you're far more likely to have a successful outcome.

Below is a quick checklist to cover the essentials. If you want to go deeper, we have included more detail in the following pages.

## The Essential Virtual Meeting Checklist:

- You are comfortable using the technology and are prepared to teach others. You have already tested your video and audio.
- All participants have access and permissions to the software tools being used.
- You have a plan on how to make sure participants can connect to one another even though they are remote (e.g. icebreakers).
- All your documents and tools are organized and ready to go.
- Agenda is broken into short segments, with a good mix of different activities and lots of breaks to keep engagement high.
- Rules for how the group will handle discussions, create space for quieter people, provide feedback regarding on-track/off-track, turn cameras or mics on or off, etc.
- You have rehearsed an online-specific presentation style that explicitly tells people where to look on the shared screen.
- You have a Plan B—if technology fails or process isn't working, you are ready to adjust on the fly.

## Before the Meeting:

### People



#### Get to know people

If you don't know all the participants in the meeting or workshop, get to know your audience before-hand. How many? What functional roles will be represented? How familiar are they with the technology? Get to know them a bit by sending out a short survey, or starting a group chat, and then asking them what their expectations are, or to gather some background information. This builds trust and helps you tailor the content to the team (e.g. will tech be a hurdle? Will breakouts be required?)

#### Plan breakouts in advance

Get the list of participants and organize them into groups for breakout sessions in advance, so that you don't have to waste time organizing this during the meeting or workshop.

### Process



#### Be clear about your objective

What is the purpose of the meeting or workshop? What are the expected outputs (documents, artifacts, decisions, deliverables, etc.)? What does the desired outcome look like and how will you know if you've achieved it or not? (What is the "job to be done" of the event?)

#### Gather materials

If you are going to be creating documents, use a blank template and have these templates ready to go before the meeting. This allows you to focus the participants on filling them in, not setting them up.

#### Plan your agenda

Share it out ahead of time with participants. Try to mix up modes of communication. It is hard for participants to sit and listen to one person talk nonstop for an hour or more under any circumstances and being online only makes this more difficult. Try to keep the material brief and mix up the formats. For instance, have a 10 to 20-minute talk/presentation followed by questions or breakout sessions and share-outs. Then perhaps move to a group activity like brainstorming or show a short video. Mix up the forms of communication by conducting a poll, doing a group voting session, or asking some individuals to do an impromptu task. Leave at least 30 seconds to have the group transition from one mode to another and build that into your time planning.

#### Plan frequent breaks

Work these into your agenda. A general rule is a 10-minute break every 60 to 90 minutes for online meetings

#### Move material offline

To shorten the duration of online meetings and workshops, think about what could be done "asynchronously" outside of a live videocall. Are there materials that participants can read ahead of time, or afterwards? What about watching videos? There is a lot of value in bringing people together in a live or "synchronous" environment, but not everything has to be done this way. Schedule pre- and post- tasks, then set clear and firm deadlines and expectations.

#### Rehearse

Practice your timing beforehand. Practice with all the technology and tools you'll be using. Make sure there are clear instructions for all exercises. The more complex the exercise, the clearer the instructions will need to be. This is crucial.

#### Have a plan B

If your technology fails you, what will you do? People will be looking to you to improvise, stay cool and keep a positive tone, even when things go sideways. So be prepared. Make a list of what is most likely to go wrong, create a Plan B for each major risk, and be ready to execute it.

#### Get help

If you are lucky enough to be able to enlist someone to help you with managing the videoconferencing technology, it will allow you to focus more facilitating discussions amongst participants. Your assistant can field questions that come in via chat and deal with any technical issues. Make sure your assistant/co-facilitator has all the same accesses to tools and tech that you do. Good typing skills are important if there is a lot of writing to do.

## Technology



### **Know your technology**

As the facilitator, you're going to be expected to know how the videoconferencing technology works, and to be able to troubleshoot the most common problems. So, whether you're using Zoom, Google Meet, MS Teams, Adobe Connect, or some other technology, be sure you are familiar with it and how it works. Same with any other tools. Test these out beforehand.

### **Access**

Does everyone have access to all the technology apps you'll be using and any required passwords? Do they need to install anything or create an account?

### **Familiarity**

Are all your participants familiar with how to use the technology? Consider hosting a brief practice session or do some warm-up exercises.

### **Common storage**

Create a common place to store all the documents, pictures and other artifacts that will be generated during the meeting or workshop. A shared, online location is best (e.g. Common Drive, SharePoint, Google Drive, Dropbox, OneDrive, etc.), so that if people continue to work on files in between meetings, everyone will have access to only the latest version. Be aware that IT security restrictions may limit this. Test it out beforehand.

### **Audio**

Good audio is key. If possible, offer both dial-in (cellular) audio and computer (VOIP) audio

### **Pay attention to lighting**

If you have a window in the room you are presenting from, try to position yourself in front or to the side of the window. Avoid having windows or bright lights behind you as it will create a dark, silhouetted version of yourself on camera. Encourage others to do the same. Having a clear view of your face on camera not only makes you look more professional, but the ability to see facial expressions also helps with engagement.

## During the Meeting:

### People



#### Introductions

To build a sense of connectedness and rapport, make sure you allow time at the beginning of your workshop or meeting to do introductions. Encourage people to speak about where they are located (city/country), in what time zone, where they are currently sitting (e.g. home office, kitchen, airport), and a little bit about themselves (fun fact, favorite hobby, etc.). Be explicit about individual time limits. If you allow 2 minutes each and you have 30 people, that will take at least an hour. It is usually best if you go first and model the type of intro you would like others to give. Be concise and stick to the time limit yourself.

#### Set rules for speaking

When people want to ask a question, will they raise their hand, or will they send the questions through chat? If there are many questions or comments at once, have a plan for how you will handle this.

#### Temper the dominators

Just like with in-person meetings, sometimes individuals or groups can be very outspoken, and come to dominate the conversations, crowding out others. Make sure you get everyone involved in the discussions; make space for quieter people to speak, if they want to. When possible, use virtual “sticky notes” to collect feedback, so that the playing field is levelled between extroverts and introverts.

#### You set the tone

As the facilitator, you set and control the energy for the whole session. You can and should allow others to present at times, but ultimately you are responsible for reining in unproductive discussions, sticking to the agenda, and ensuring the desired outcomes are achieved.

#### Don't ask for confirming answers

Ask for exceptions. E.g. don't ask “Are we ok to move on?” (seeking a positive confirmation). Ask instead, “unless someone says they need more time, I'm going to move on”...wait 5-10 seconds...then, if there is silence, “ok, I'll move on now”.

### Process



#### Create a dashboard

Use a type of kanban/scrumboard (e.g. Trello or Planner app in MS Teams—there are lots of options) to move agenda items from “To Do:” to “Doing” and then “Done” in real-time. This helps audience follow the agenda and situate themselves. In any meeting or workshop that runs longer than an hour, audiences generally like to know where they are going and where they are at. This is even more crucial when facilitating online.

#### Timebox everything

Use a visible timer. There is one built-in to Windows and there are many free apps you can use on Mac and Windows. Limit activities wherever possible to 10 minutes or less. Keeping things tightly timeboxed allows you to keep to your planned agenda—or, choose to deviate from it intentionally.

#### Solicit feedback

It is harder to “read the room” online, so ask your audience frequently for feedback on the process, pace, and energy level. While keeping overall objectives in mind, determine what's working and not working and adjust accordingly.

#### Mix activities

Ask people to vote, discuss, or hold breakout discussions on material to keep the engagement of participants high.

#### Take frequent breaks

It's exhausting to be online all day. A 10-minute break every 60 to 90 minutes is recommended.

## Technology



### Comfort

Make sure people are reasonably comfortable using the technology. Be patient while people figure out how to turn on their cameras and microphones.

### Meet the tech

Briefly go over how the audio works (muting, unmuting) and ground rules for speaking. Does everyone know how to share their screen? Demo tools that will be used, e.g. Chat, Mural, Trello board, etc. Encourage everyone to turn on their cameras; make it safe for them to be seen in casual attire in a home setting. Seeing people's faces helps with engagement and non-verbal communication.

### Be flexible

Focus on the desired outcomes, not the tools. Some tools may not work online the way you're used to when presenting in-room (e.g. drawing on a whiteboard). Don't spend too much time struggling to make something work. Try to switch tools or approaches instead.

### Verbalize what you're looking at

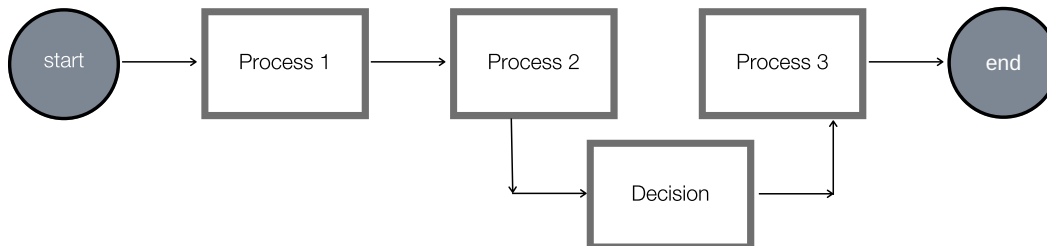
Don't assume people can see what you see. Use phrases like "third green box in column 4" to orient people. Use the pointer function in MS Teams or Zoom to help guide the audience's eyes. Practice guiding people's attention when you can't see them, and they can't see you.

## HINT FOR ONLINE PROCESS MAPPING

Avoid Visio. It's hard to work with on the fly and the online version offers limited features and functionality. Try using something like Mural, Powerpoint, or Excel. The process maps do not have to be perfect! Remember, it's about improving the process, not the map.

Below is an example of a simple process map created with Mural:

### My Process Map



## After the Meeting:

### People



#### Clarity

Ensure everyone is clear on what the next steps are. Who owns which actions? By when will they be delivered? Use visual management like Trello, Mural, or others to indicate who is doing what. Get participants to confirm verbally their awareness of their ownership and responsibilities.

#### Integration

Designate someone to integrate all of the material and activities. One of the advantages of using electronic tools is that you do not have to transcribe much.

### Process



#### Follow-up

Where can people go for further help or follow up? Make sure it is clear to all where they can contact the needed people or resources.

#### Common storage location

Remind participants where the common storage location for documents and artifacts is. Make sure everyone can find it and that they have the right access. This applies as well to videos or articles that you need people to watch/read prior to next meeting.

#### Feedback

Ask people what worked well and what could be improved for next time. Make whatever adjustments you can.

#### Reflect

Take time to reflect yourself on what worked well and what you could do better the next time. Write it down so that you can refer back to it.

### Technology



#### Playback

If you have recorded the session, where will it the recording be stored? Does everyone have access to it? Will people have to download the file (note A/V files can be very large) or can they stream the video?

#### Learn and improve

Is there functionality that you wish you had but were not sure how to use it? Check to see if your existing suite of digital tools contains what you're looking for before going out and purchasing another tool (remember, you want to minimize the number of separate tools participants will have to keep track of). Teach yourself how to use this missing functionality for next time.