



Virtual Facilitation of Results Work

What's different with a virtual meeting compared to an in-person meeting?

- Because virtual meetings have a shorter timeframe than in person meeting, there is less time for you to devote to one task in each section on your agenda.
- In virtual meetings it is difficult to have informal interactions with others, such as side conversations during breaks of in person meetings.
- With the lack of opportunity to have informal interactions, most interactions are mediated and scripted.
- Because virtual meetings have a limited view of the person, it can be difficult to see the non-verbal communication (affect, body language, etc.).

What work prior to the meeting can I send to participants to prepare them for a virtual meeting?

- When sending instructions to participants be sure to use plain language.
- Use google docs (or other collaborative tools) for participants to share their pre-meeting reflections so the group can see the “data” coming into the meeting.
- Assign collaboration between participants as part of prep-work.
- Design prep-work so that it results in a product (journal notes, chart, write-up) that can be used in the session and (preferably) shared in small breakouts.
- Share expectations with the group so everyone comes ready to actively participate.
 - Sample language: *We are looking forward to an engaging session on X. Although these sessions are virtual, we ask that you treat them with the same care and attention you would an in-person/away-from-home session. Please plan to be on video in one location for the entirety of the three-hour session (knowing we'll have a 15 min break halfway through). If this is not possible for you, please share with us in advance why not and what steps you'll take to still actively participate in the session.*

How should I design the agenda for a virtual meeting?

- Use plain language in agenda design.
- Intentionally plan for cross-team sharing and small group breakouts within session (using virtual break-out rooms).
- Build in opportunities in agenda design to model exercises (when people are in virtual rooms, they're on their own and can't easily get help from faculty).
- Build in checkpoints through the meeting to pause - check for understanding – invite participants to summarize what they are hearing
- Create a workbook that supports the agenda.

- The workbook should include resources (what would usually be handouts) and instructions and discussion questions (content that would usually be flip charted); organize the notebook to parallel the order of the agenda.

What facilitation techniques should I use during the virtual meeting?

- Use plain language in facilitation to make content accessible and be concise in delivering content and ask short, simple effective questions.
- When presenting an opportunity through an for participants to engage/share – present a prompt question and read it aloud for those that might be joining the call via phones
- Divide the presentations and discussion components content into small digestible sections to keep teams engaged and focused.
 - No long sequences of work—those should be left to work between sessions.
- Name and maintain norms and expectations (e.g. pace of session, use of video, cold calling if there's a lull in discussion).

What technical components should I be aware of to have an effective virtual meeting?

- To speed up the cadence of the virtual call, establish norms around pace and participation.
 - We're going to move fast, please use the chat box for simple questions or observations, etc.
- If possible, pre-assign virtual break-out rooms before the meeting starts.
- If possible, have people participate with their own laptop so everyone is visible on camera.
- Share the workbook via share screen only as needed; don't do it the whole time.
- Use the chat box to document live-time without screen-sharing (maximizes the ability to see people's faces while engaging in the conversation).
- Below are helpful tips and language to send participants pre-call to prep for virtual session:
 1. This session will include breakout rooms, so we ask that you please hold the virtual meeting with your team in one room, and if possible, to also have everyone on their own computer.
 2. Test your audio and visuals prior to the meeting.
 3. Leave your video on to help to engage meaningfully in the meeting.
 4. Be sure your Zoom is on mute unless you are speaking to avoid feedback on the Zoom feed.

Excellent video on technical aspect of hosting Zoom meeting available [here](#)

Guiding Questions for Moving Your Meetings & Events to Virtual Engagements

First, acknowledge the loss that a virtual engagement won't be the same as an in-person session.

Next, begin to take stock of what you need to adjust and rethink creatively to move forward.

Here are some guiding questions to consider as you work to make adjustments:

1. **Results:** What are the core results or goals you would like to accomplish with the group? Consider the changing context and calibrate what you expect to accomplish by when.
2. **Preparation and Follow-Up:** How are you preparing people to actively engage and participate in a virtual engagement? Consider sending tips and reminders in advance, begin with a moment of mindfulness, acknowledge that there might be technical snags and the meeting needs to accommodate for participants' learning curve, and leave with clear action commitments.
3. **Shared Work:** How will you support a shared learning and action orientation during the session? When you can't document progress on flip charts, use shared docs on Google Drive or Box, chat box or whiteboard functionality on videoconferencing platforms.
4. **Relationships:** How will you nurture connections and build relationships across participants during the session? Consider opportunities for people to connect at a personal level and in smaller groups than full-group engagement as the default.
5. **Modality:** How will you vary the ways in which people will engage in the session? Consider limiting the amount of time in lecture/information-sharing mode and create varied opportunities for engagement, including journaling, pair/trio sharing, and full group work. Use breakout room features when available to enable small group work.
6. **Tempo:** How will create spaciousness and nurture creativity in the session? Consider opportunities to slow down, check for understanding, ask for volunteers to summarize what they have heard, create a culture of abundance, and balance attention and the array of distractions that are present.
7. **Sequence:** How will you arrange different conversations and activities to support a purposeful arc of forward-motion towards action and results? Consider ways to explicitly make connections between different topics and create space for breaks and processing time. A good rule of thumb is 60-90 minute segments on task with 15-30 minute breaks in between.
8. **Group Composition:** You will want to keep in mind the participants on the call in order to hold an effective meeting. Make considerations for their roles what do they have the authority to move the results? What resources will they need to move the results? What are the relationships dynamics exist amongst the participants?