The Secrets of Virtual Facilitation

Adapted from Leadership Strategies' courses:
Facilitation Skills for Trainers **and** *Facilitating Virtual Meetings*

Facilitated by
Michael Wilkinson, Certified Master Facilitator
Leadership Strategies, Inc.

I. Getting Started
The Virtual Reality

From *The Virtues of Virtual Meetings*, a 2013 survey of 438 executives and managers by Leadership Strategies.

- _____% said that their organization had held_____virtual meetings in the past 12 months than they had in the previous 12 months.

- _____% said they participated in virtual meetings from their_____.

- Only_____% indicate they are very comfortable using virtual meeting _____.

- _____% indicated_____is an obstacle to successful virtual meetings.

II. The Virtual Dilemma

Virtual Sessions – It's all about:

_____

Tools

- Polls
- Whiteboards
- Slideboards

- Desktop Sharing
- Round Robins
- Chat box

III. Preparing for the Virtual Session
The 6 Ps of Preparation

1. P_____ Why are we having the training?

2. P_____ What do we need to have when we are done?

   _____ _____ _____

3. P_____ Who will be attending?

4. P_____ What issues will be addressed?

5. P_____ What steps will get us there?

6. P_____ How will you effectively utilize your virtual training environment/platform?

Choosing the Virtual Platform

Levels of Engagement and Productivity

10	Face-to-Face
8	
6	
3	
1	Audio only

Product Tiers			
	1	——— **Features**	Includes basic features such as video and desktop sharing, as well as advanced features such as annotation, breakouts, polling, and whiteboards. **Examples:**
	2	——— **Features**	Includes basic features such as video and desktop sharing, but typically does not include one or more of the following: annotation, breakouts, polling, and whiteboards. **Examples:**
	3	——— **Features**	Excludes one or more basic features such as video or desktop sharing, or supports fewer than fifteen users. **Examples:**
	4	——— **Purpose**	Provides features for a special purpose or a special audience. **Examples:**

Choosing the Virtual Platform

- Determine the why, the what, and the constraints.
- View a variety of platforms
- Identify the most critical product features
- Narrow your choices based on product tiers
- Select the platform

	Product Tiers			
	1 Full	**2** Basic	**3** Limited	**4** Special
To maximize engagement, it is important to have annotation, breakout rooms, polling, or whiteboard.	√	Eliminate		
To increase productivity, it is important for everyone to see one another and to see the leader's desktop.	√	√	Eliminate	
More than twenty-five people need to attend the virtual meeting at the same time.	√	√	Eliminate Most	√
The virtual meeting platform must be free.	Eliminate		√	Eliminate

Preparing the Agenda…and Detailed Agenda

A. Getting Started	
Process	List the key topics participants want to discuss; group the topics into categories.
Virtual Details	• Have participants record their key topics on the whiteboard. • Move items on whiteboard into groups.
Timing	10 minutes (2 + (12 issues x 0.5) + 2)

Virtual Ground Rules

- Announce yourself when joining and if leaving early.

- Identify yourself before speaking until voices are familiar.

- Avoid the "hold" button, especially when music or other sounds result.

- Use consistent order of speakers.

- Stay 100 percent focused during the meeting; avoid doing other work, answering e-mails, etc.

- Remember the_____.

Do You Need a Moderator?

- Assist with chat rooms, polling questions, documentation, maintaining the parking boards.

- Support all technical issues.

- Other considerations:

- Monitoring activity

- A second voice for variety

- Recommended if_____or more people

Handling Difficult "Room" Setups

Only a Few Virtual Participants	**Issue:** Virtual participants feel isolated and uninvolved **Actions**: Send agenda and handouts in advance of the meeting to remote participants. If possible, arrange for video as a part of the meeting. Use whiteboards for sharing information gathered during the meeting. Consider ground rules such as "Don't forget the remote." Include the remote participants in every round robin
Most are Virtual	**Issue:** Due to the inability to "read the participants" as well, the tendency is a lack of engagement during training with many virtual participants **Action**: Use round robins maintaining the same order each time. Use whiteboards allowing remote participants to annotate the whiteboards. Use of engagement activities such as "the whip"

Checklist for Preparing

❑ Decide the meeting's purpose.*

❑ Define the meeting's products.*

❑ Confirm that the meeting is necessary.*

❑ Select the participants.*

❑ Identify probable issues.*

❑ Develop the process (agenda).*

❑ Choose the virtual platform.*

❑ Determine key methods and timings.

❑ Determine meeting rooms, date, and time.*

❑ Develop and distribute the meeting notice.*

❑ Hold preliminary discussions beforehand, as needed.

❑ Prepare the virtual meeting room.*

❑ Select your ground rules.

❑ Prepare your roll call list of participants.

❑ Prepare your opening words.

* = Recommended for all meetings

Employ all your best presentation techniques:

- **Turn on your webcam for remote participants to see you**

- Sit tall, don't slouch

- Speak loudly and clearly; vary your tone and emphasis

- Avoid speaking too fast or too slow; vary your rate of delivery

- Be animated

- **Make eye contact using the webcam**

- Use defined gestures

- Avoid "self-talk"; - Avoid filler words (e.g., "ah," "um")

- Avoid extremes in dress and grooming

- Ensure your facial expressions match what you are saying

Checklist for Starting

❑ Start the meeting on time.
❑ Deliver the opening, including purpose and products.*
❑ Perform a roll call.*
❑ Engage the participants.
❑ Confirm the agenda.*
❑ Review the ground rules.
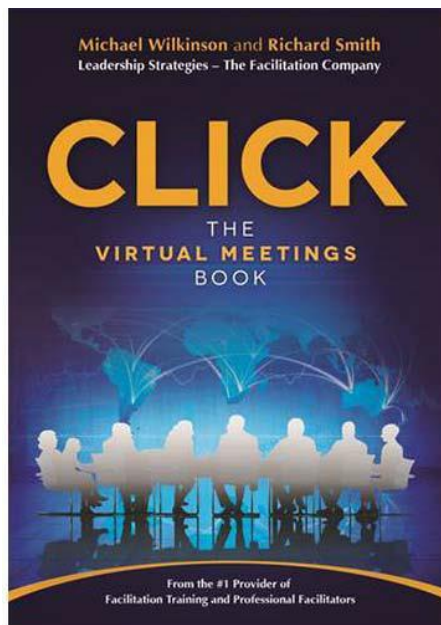❑ Review the parking boards.
❑ Make introductions, if needed.

* = Recommended for all meetings

What's Next? Learn More…

The Effective Facilitator

+ 10 principles and over 100 tools and techniques
+ 6 practice sessions
+ INIFAC Accredited to cover the competencies of the Certified Master Facilitator

www.leadstrat.com
1-800-842-2850