EFFECTIVE VIRTUAL FACILITATION
PURPOSE

• More consciously consider the preparation needed for virtual sessions
• Address the technology requirements for virtual sessions
• Discuss techniques which can engage participants in virtual sessions
• Discuss and develop solutions to counter virtual session challenges
## TOPICS

**Ways of Working**

- Assessment of your own virtual sessions

**Virtual session stages:**
- Pre-session preparation
- Facilitation: Includes Opening and Closing
- Post-session follow-up

- How to more effectively engage participants

- How to manage difficult situations

- Your personal action plan
WAYS OF WORKING

It is important to find agreement on how each participant will behave and take responsibility during a virtual engagement. Your WoW could include:

• Be engaged – participate, share your thoughts, ask questions
• Shut down Outlook and Instant Messaging
• Turn your video on and stay on mute when not speaking
• State your name before speaking

Get the most out of this session!

Anything else?
HOW EFFECTIVE ARE YOUR VIRTUAL SESSIONS?

1. Complete the following inventory based on the last few virtual sessions you led.

2. Thinking of those last few sessions, answer either Yes or No for each question.
EFFECTIVE VIRTUAL SESSIONS INVENTORY

1. You were confident about required technology prior to session start.
2. You informed participants before the session how to set-up the technology.
3. Participants knew the purpose and agenda for the session in advance.
4. The session's purpose, desired outcomes, and agenda were reviewed at the start.
5. Prior to ending the session, all issues, decisions, and actions were reviewed.
6. The session produced a valuable result to all participants.
7. Ways of Working were discussed and agreed at the start.
8. The right participants were at the session.
9. Participants arrived on time and stayed for the duration.
10. Participants were actively engaged by you, as facilitator.
11. Participants were expected to engage with each other.
12. You varied the audio and visual formats throughout, for interest.
13. The session started on time and ended on time.
14. A moderator helped you with technology and chat-box input.

Based on Are Your Meeting Masterful? By Michael Wilkinson, Managing Director, Leadership Strategies, Inc.
<table>
<thead>
<tr>
<th>INVENTORY CATEGORIES</th>
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WHEN TO GO VIRTUAL

• Face-to-face session is not possible or feasible
• Focus is not likely to generate large conflict or potential for significant distress
• Participants have access to collaborative technology
• Limited issues to be addressed during each session
VIRTUAL FACILITATION ‘STAGES’

Pre-Session

During Session
- Opening
- Facilitating
- Closing

Post-Session
## CATEGORISE BY STAGE: WHEN TO DO?

<table>
<thead>
<tr>
<th></th>
<th>PRE-SESSION</th>
<th>OPENING</th>
<th>FACILITATING</th>
<th>CLOSING</th>
<th>POST-SESSION</th>
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<tr>
<td>Create a Facilitation Activity Plan (FAP)</td>
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<td>Familiarise with technology</td>
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<td>Preface statements with your name</td>
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<td>Provide activity for participants logging in early</td>
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<td>Consider ways of working</td>
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<td>Assign roles if relevant</td>
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<td>State or discuss purpose of session</td>
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<td>Upload presentations</td>
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<td>Check-in</td>
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<tr>
<td>Encourage discussion and interaction</td>
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<td>Review of decisions and actions to take</td>
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<td>Check-out</td>
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<tr>
<td>Distribute decision/ action summary</td>
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PRE-SESSION PREPARATION
PREPARE FOR YOUR SESSION

Complete FAP for a virtual session
- ‘Design’ the session
- Include proposed Ways of Working (WoW)
- Consider optimal participant engagement

Circulate the session plan to participants
- Start with session purpose
- Outline the process and their contribution
- End with desired outcomes for session
- Pre-assign participant roles if relevant
- Set WoW expectations and provide technology guidance

Familiarise with technology
- First, yourself – what will you need to know/ do as facilitator?
- Next, participants – what do they need to know/ do?
- Organise a moderator to help you
USE TECHNOLOGY TO YOUR ADVANTAGE

Whether Zoom, Skype, Pexip, Webex.....

- Get familiar with the technology
- Ensure that participants are, too

Prior to the session:
- Provide technology guidance in joining instructions
- Or offer a pre-session ‘how to’ primer – e.g., 15 minutes

<table>
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<th>How to...</th>
<th>Why?</th>
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<tbody>
<tr>
<td>😊 Turn on their video</td>
<td>Being seen helps engagement between participants</td>
</tr>
<tr>
<td>😊 Test their audio</td>
<td>There are often difficulties in being heard</td>
</tr>
<tr>
<td>😊 Change their identifying info to their name</td>
<td>Names help to identify who is on line</td>
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<tr>
<td>😊 Mute their microphone</td>
<td>Some connections contribute static or background noise</td>
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<tr>
<td>😊 Use the chat box</td>
<td>Participants can ask questions of all or have private conversations</td>
</tr>
<tr>
<td>😊 Use any other interactive options</td>
<td>To enhance engagement – chat rooms, waving hand, etc.</td>
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SETTING WOW EXPECTATIONS IN ADVANCE

- **Arrive on time**
  - Introductions will not be repeated

- **No ‘driving’ participants or other distractions**
  - Detracts from full engagement

- **Wear a headset**
  - Results in better quality audio, less noise

- **Video is turned on**
  - More engagement, can read body language and sense readiness to contribute

- **Mute when not speaking**
  - Reduces noise, communicates listening mode

- **Participants will be asked to contribute**
  - Ensures full involvement of all on the line, full engagement is expected
ON THE DAY

- Pre-load your materials
- Test the technology
- Get on the line early
- Do an audio and video check
OPENING THE SESSION
OPENING

- Have an activity for early participants
- Start on time
- Establish and discuss session purpose
- Check-in and do introductions
- Review proposed ways of working
CHECK-IN

Acknowledge others’ socio-emotional needs...
Give time to relationships!

This is a talking circle

A talking circle is a metaphor for creating a sense of order to contribute; it can be in any form or order

What do I hope to gain from this session?

What do I need to leave outside this session to get the most out of it?
A TALKING CIRCLE

Rules for a talking circle:

- Take it in turn to speak – moving around the circle or predetermined order
- Listen fully – turn off your internal dialogue (listen as you would like to be listened to)
- The more that you disclose, the more that we will all move ‘to our edge’
- You do not have to speak if you don’t want to
- What is said in the circle, remains in the circle (unless you have the speaker’s permission)
CHECK-INS AND STEMS

How is your energy right now...?

What do you need to let go of to be fully present?

How do you feel (in your head, your heart and your body)?

What are your hopes and fears for.. *this session / this organisation / this team* etc.?

What were your waking thoughts this morning? (particularly on the second day of an event)

**Stem Examples**

- What I want out of this session is...
- One reason why this session is important to me is...
- Something about me that might surprise you is...
WAYS OF WORKING

• Pre-established WoW help with time management (virtual sessions are typically no longer than 60-90 minutes)
• But always revisit them to ensure they are not just a ‘tick-box exercise’

In addition to the set WoW, what are additional guidelines relevant to virtual facilitation that you might like to add?
Take some notes to consider how you could revisit your own WoW.
FACILITATING FOR ENGAGEMENT
WHILE ON A CONFERENCE CALL, HAVE YOU EVER...

- Texted: 44%
- Played a video game: 25%
- Sent an email: 63%
- Ate or made food: 55%
- Checked social media: 43%
- Shopped online: 21%
- Done other work: 65%
- Gone to the toilet: 47%

Source: West Unified Communication Services, survey of 500 staff, August 2014
MULTI-TASKING

74% of people say they multi-task during conference calls.
LIMITING MULTI-TASKING

- Ensure relevance of the issue(s)/topic for everyone
- Ask questions of participants to encourage input
- Reinforce WoW
- Assign roles where relevant
- Use technology to focus attention
- Keep participants engaged and busy
ACTIVITIES THAT ENGAGE

<table>
<thead>
<tr>
<th>Technology - or medium driven</th>
<th>Others</th>
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<td>• Use the virtual whiteboard to allow others to input ideas</td>
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<tr>
<td>• Assess viewpoints with polling technology</td>
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<tr>
<td>• Show short video clips</td>
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<tr>
<td>• Break into small discussion groups using chat rooms</td>
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<tr>
<td>• Assign pre-reading for discussion</td>
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<tr>
<td>• Assign short reading during the session for discussion</td>
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<tr>
<td>• Ask for specific viewpoints relevant to the issue – e.g., male vs female, clinical vs non-clinical</td>
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MANAGING CHALLENGING SITUATIONS

What resources are available to manage challenging virtual facilitation situations?

1. Remind about **Ways of Working**

2. Look to the ‘talking circle’ – ask for input, go in a particular direction, check on silent ones

3. Ask the **Experts** what to do – your participants

4. Re-focus on **Purpose**
SCENARIO 1

Dr. Smith is monopolising the session. He disagrees aggressively and disregards and criticises others’ views.

Choose the appropriate option/s out of the following:

a) Reflect/ Deflect – Use peer pressure to shut him up
b) Remind him about the ways of working
c) Ignore the behaviour since his points are valid
d) Seek participant opinion on the points being made by Dr. Smith
SCENARIO 2

Mary has logged in late at the last three sessions.
Choose the appropriate option/s out of the following:

a) Give Mary a job to do during the next meeting
b) Since it is quite early in the day for Mary, do not act on this
c) Reinforce team norms and create awareness of the distraction caused by latecomers
d) Take it offline with Mary
SCENARIO 3

Meeting participants have fallen silent.
Choose the appropriate option/s out of the following:

a) Check to see if you/ they have dropped offline
b) Use a question to involve participants
c) Continue with your session, as you have a lot to get through
d) Do not do anything. Participants are clearly engrossed in your facilitation.
CLOSING AND POST-SESSION
CLOSING

• Make time for it

• Depends upon purpose of session – e.g., are there any decisions, actions, or next steps?

• Checking-out is generally a good thing – it support relationship-building

What am I taking away from this session?

What action I will take when I get back to work is...
CHECK-OUTS AND STEMS

What were the benefits of this session?

What concerns remain?

What more is needed?

Stem Examples

• What I found good about this session was...
• What I found difficult about this session was...
• What I would do differently next time is...
• One thing I have learned about myself during this session is...
• The thing I need to tell my team coming out of this session is...
POST-SESSION

• This depends on the session purpose
• It may help to re-cap in an email what was discussed and decided at the session, to continue engagement of participants for future sessions
• You can also communicate any feedback received about the session
LEARNING SUMMARY

1. Preparation is key
2. Create a FAP based on a virtual session
3. Pay attention to relationship-building aspects – Check-in!
4. Familiarise with technology
5. Make sure to set Ways of Working
6. Be clear about session purpose
7. Engage participants in various ways
ACTION PLAN

**WHAT**
What are my 2 key learning points from this material? (which concept, technique, information? …)

**WHEN**
In which type of virtual sessions will I apply this learning? When is the next one?

**WHO**
Who is my target audience for the next virtual session?