



Virtual Facilitation Foundation Skills

Virtual Workshop
February 26, 2021

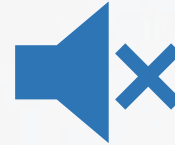


Workshop Guidelines

Please turn on your video to increase engagement and personal interaction during our workshop



To reduce background noise, please mute your audio until you wish to speak



Feel free to share your comments or respond by raising your hand physically or using the Raising Hand Function



Please ask questions or make comments throughout by using the chat function



Take breaks as needed and return to our session as soon as possible



Maintain confidentiality and demonstrate respect for others' sharing





Please introduce yourself:

- **Name, role, where you are situated**
- **Share your best and/or worst experience in a virtual meeting (as a host, presenter or attendee)**

Your Coaches, Supporters and Guides Today



- We are here to share with you all the virtual facilitation skills we have learned during our training careers, especially the adapted tools we gained in 2020
- We wish to help you learn from all the mistakes we made and pitfalls we experienced
- We will encourage and motivate you as well offer helpful feedback

Objectives

- Design and prepare your meeting agenda and outcomes for maximum effect
- Present yourself professionally on video
- Host meetings effectively and collaboratively with a diverse group of participants
- Anticipate and manage technical issues with ease
- Follow your agenda and run your meetings smoothly
- Build rapport, connection and team collaboration
- Read the body language and nonverbal cues of your audience
- Keep your attendees engaged, focused and motivated during your meetings
- Practice meeting tools such as breakout rooms, polling, whiteboard, chat and other useful functions
- Follow up with your meeting participants in a professional manner





Our Agenda

Welcome & Introductions (15 mins)

Our Online World Today (15 mins)

I. Role as a Virtual Facilitator (30 mins)

- Mindset, Presentation, Preparation

II. Virtual Session Purpose & Outcomes (45 mins)

- Objectives, Agenda, Ground Rules, Communication, Meeting Etiquette

III. Mastering Online Facilitation (75 mins)

- Technology, Engagement, Interactive Tools

Practice Sessions (60 mins)

Summary and Wrap Up (15 mins)

Our Online World Today

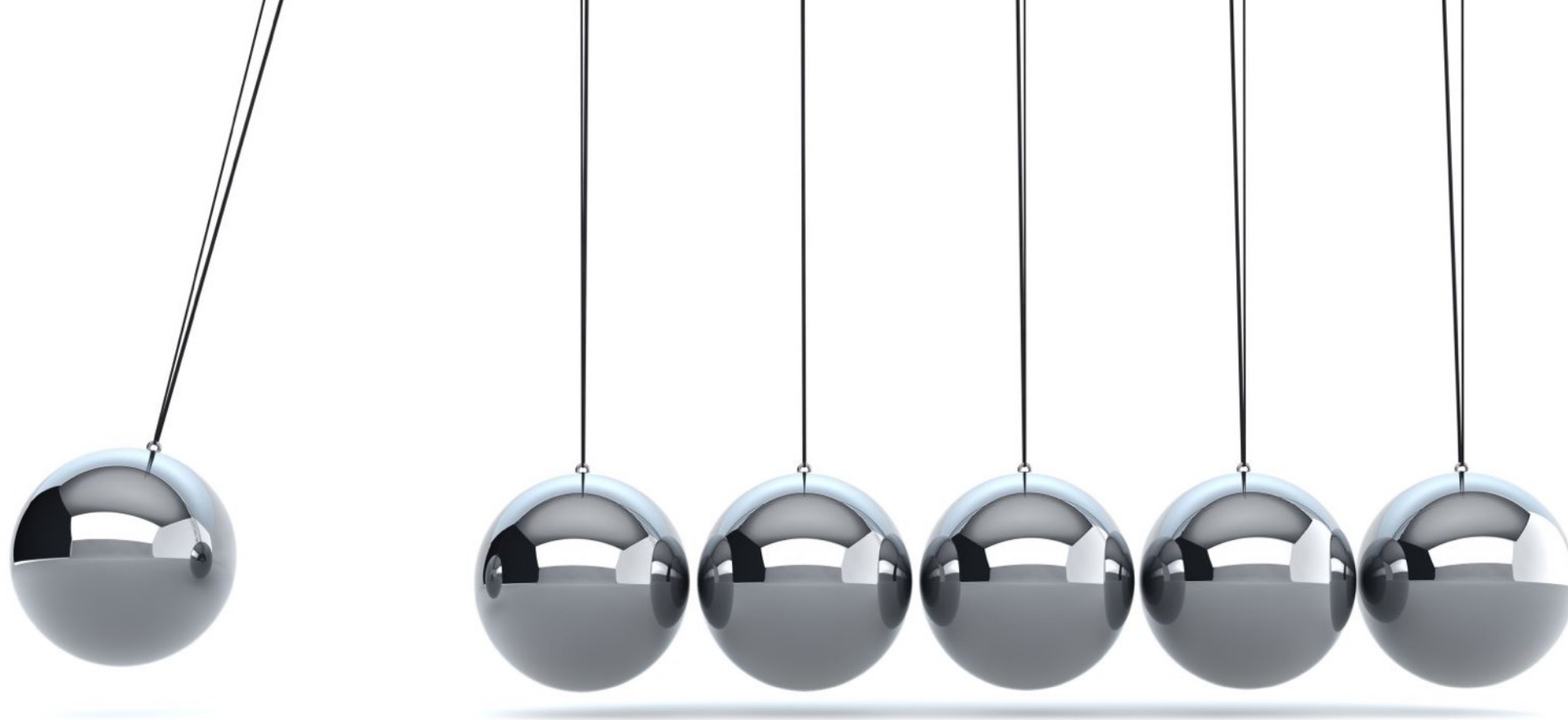


Does This Seem Familiar?





1. You're On Mute!
2. Great Idea!
3. I Can Relate



Benefits and Challenges of Virtual Meetings





Breakout Session (5 mins)

- List all the Benefits or Challenges of virtual meetings in your breakout group
- Appoint someone to share group's findings and someone to take notes

Breakout Room Tips

If you are experiencing any technical issues, please use the raise hand function and we will get to you as soon as possible.



Please assign a timekeeper to ensure everyone has time to speak within the allotted time



The discussion topic and reminders will be displayed while you are in your breakout room.



Pay attention to the clock and you will have one minute to return to the main room when time is up.



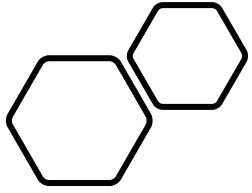


I. Role as a Virtual Facilitator



A young green plant with a visible root system growing out of dark soil against a grey background. The plant has several green leaves and a thin stem. The roots are exposed and spread out in the dark soil. The background is a solid, light grey color.

Your Mindset



Remember This?

- Yes, we certainly miss collaborating in person!
- ...but what was not-so-great about leading a meeting, training or group in person?







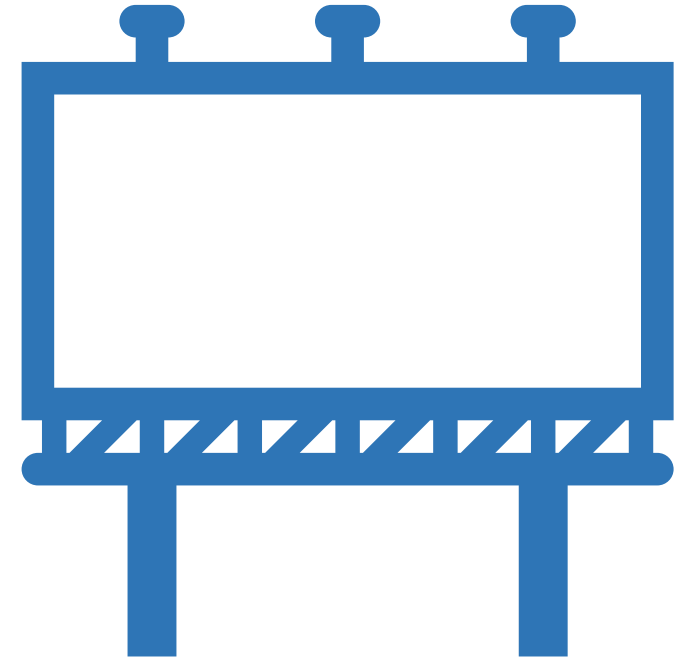
What is Your Mindset Around Working Virtually?

1. This is an efficient and flexible way of work that fits my style perfectly
2. This is the future of work and I am now skilling up for this inevitable change
3. It is manageable for the time being but will never replace working in an office
4. This was forced upon me so I will have to endure it until work gets back to normal
5. Working remotely is difficult and I will never be able to master this





What's GREAT about Working Virtually?



Your Professional Presentation

How Others See You



Set Up: Lighting, background, screen positioning



Attire: Professional appearance, features, accessories, colors

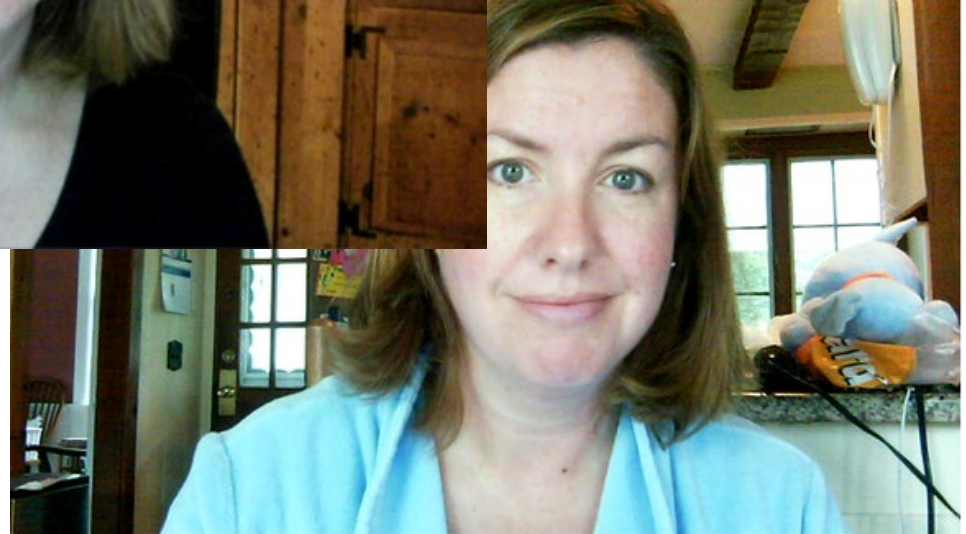
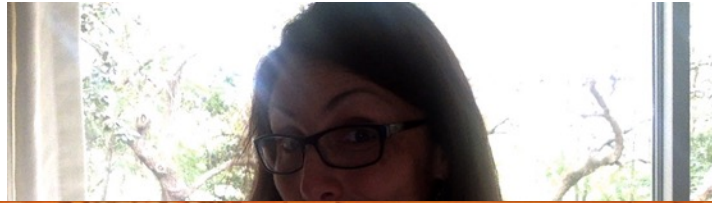


Body Language: Posture, gestures, eye contact



Your Actions: Writing, drinking, texting, eating

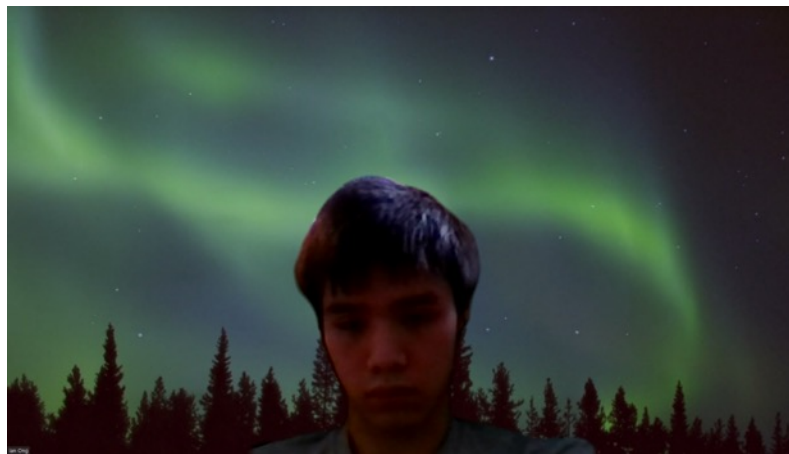






Background

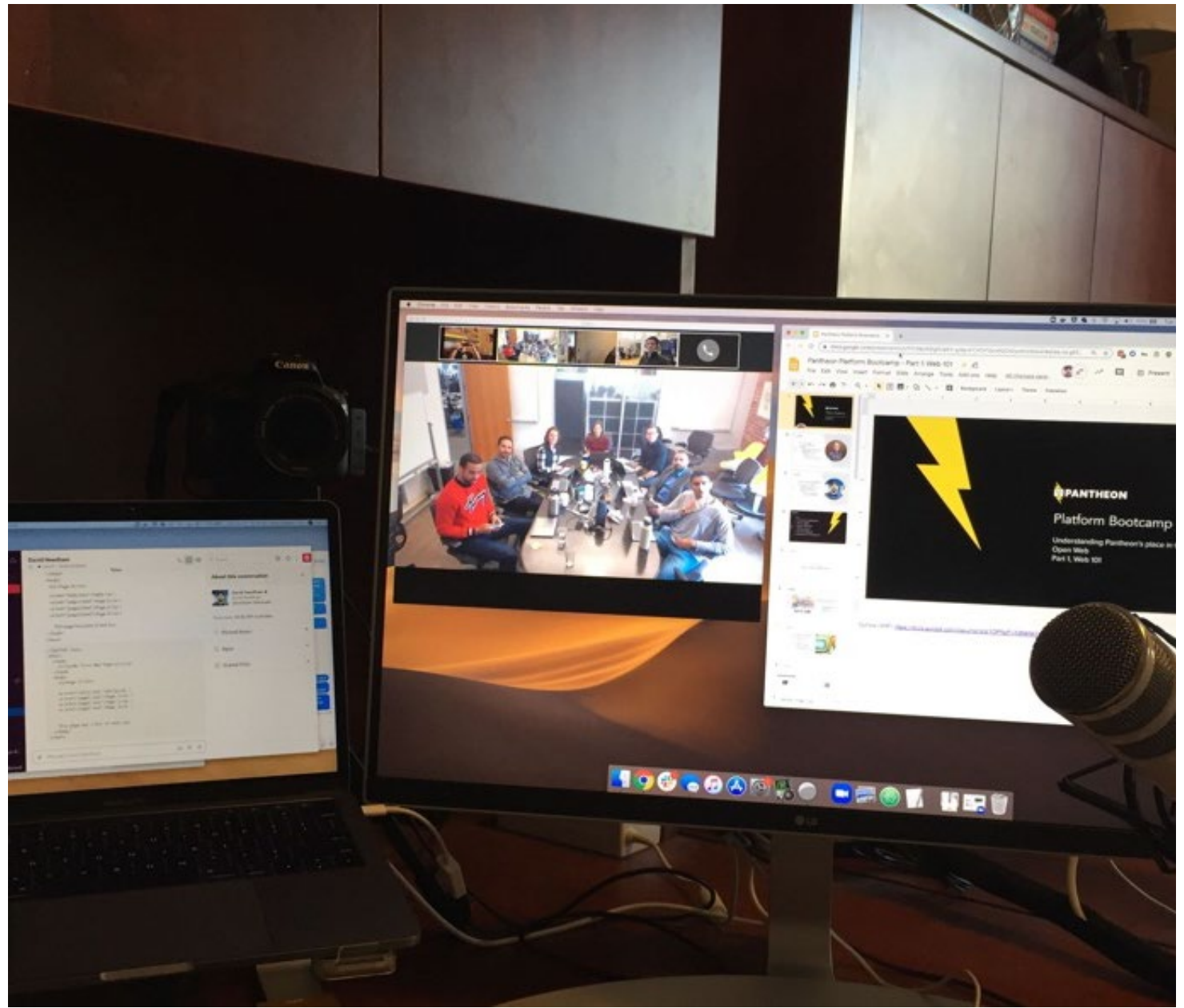
- Virtual background or not?
- Your background represents your brand
- Choose what you want your audience to see





LOOK in the CAMERA
NOT the SCREEN...
HOW MANY TIMES
HAVE WE BEEN REMINDED...
Let me introduce "ZUMI" your
VIRTUAL MEETING AVATAR
CUT OUT & PUT ZUMI ON TOP OF YOUR
WEBCAM, AND SHE/HE WILL SERVE AS A
REMINDER TO LOOK HERE!







Your Preparation

Your Basic Checklist

- ✓ Internet connection
- ✓ Proper video/audio tools
- ✓ Power, computer fully charged
- ✓ Quiet space
- ✓ Remove distractions / no multi-tasking
- ✓ Test platform and functions
- ✓ Minimize desktop programs/apps
- ✓ Hard copy of presentation or soft copy on a separate screen
- ✓ Prepare beverages to stay hydrated (remember to eat before your session!)





Mental Preparation

- Review your outline, content and points of interactions with attendees
- Prepare back up for the 3 Fails: technology, audience engagement, platform
- Take time out for silence or grounding before your meeting (we recommend 30 mins)

What are your Preparation Rituals?





Summary: Role as a Virtual Facilitator

- Our online world today has forced us ahead of time to adapt to a new way of communicating and collaborating with each other
- Your mindset will determine how you see the benefits and challenges
- Your professional presentation is an important part of your facilitation and investing in the proper setup and equipment for your workspace is highly recommended
- Make a ritual to prepare yourself physically and mentally for the virtual session





II. Virtual Session Purpose and Outcomes



Planning Your Meeting



Define meeting purpose
and outcome

What do you hope to achieve?



Confirm the role of Host,
Note Taker, Participants
and other Observers

Who needs to attend? Who will
take which roles?



Check everyone has the
proper equipment

Arrange a 15-minute testing time
before the meeting if needed



Touch base with participants individually to get
agenda items



Prepare meeting
communication

Meeting agenda
Pre-meeting reading
Meeting access information
Meeting etiquette



Define Meeting Objectives

- What do you hope to achieve?
- What is your intention?
- What is the best outcome for attendees?
- What's the most important information that must be shared?
- What is their gain from attending this meeting?



Know Your Participants


- How many people will participate?
- Who are the participants?
- Where are they located?
- What is their situation (hybrid office/home office) and connectivity?
- What are the time zone differences?

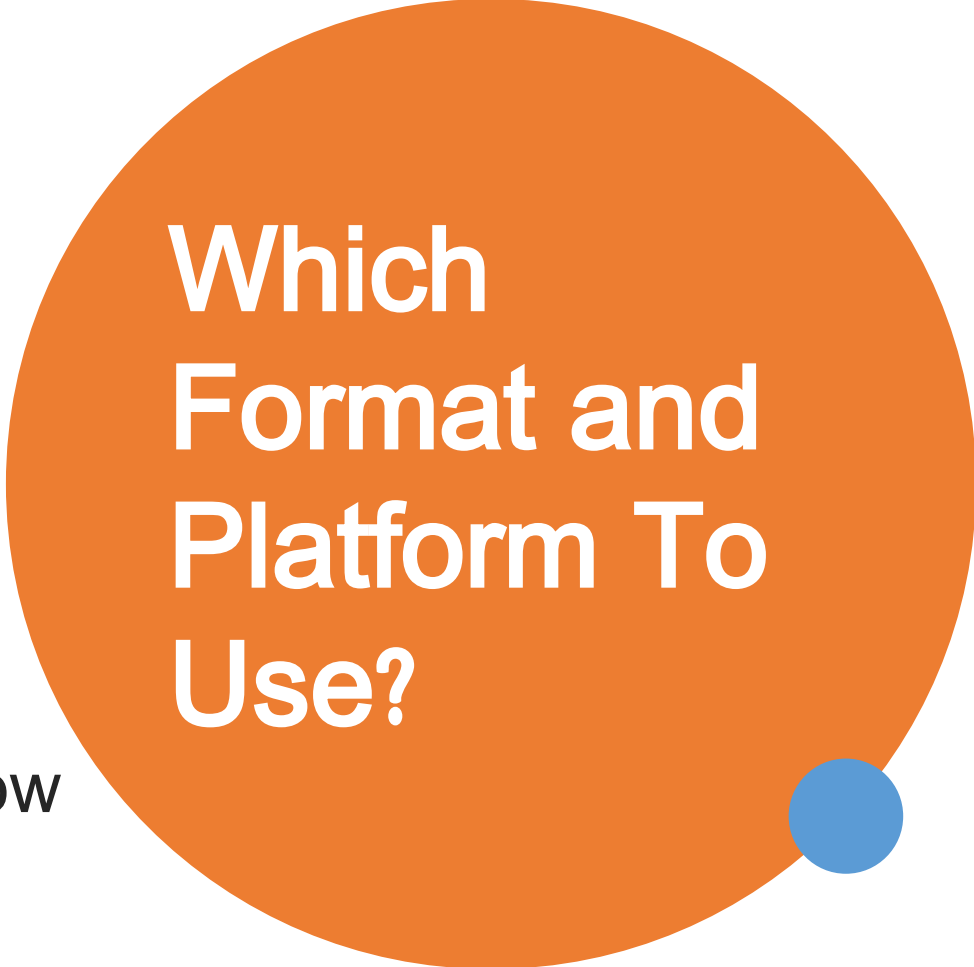















Format:

- 
- Meeting, workshop, webinar, presentation, 1:1
 - Formal, informal, social
 - Platform:
 - Does it offer video and features for collaboration?
 - Does everyone have access and know how to use the tool?
 - How can information and results be documented afterwards?



Which
Format and
Platform To
Use?

Web Conference Platform Comparison

	 Voice	 Webcam	 Screen Share	 Chat	 Polling	 Drawing Tool/White Board	 Breakout Rooms	 Q&A	 Quiz
Zoom	●	●	●	●	●	●	●		
Adobe Connect	●	●	●	●	●	●	●		●
Webex	●	●	●	●	●	●	●	●	
GoToTraining	●	●	●	●	●	●	●	●	●
GoToWebinar	●	●	●	●	●	●		●	●
GoToMeeting	●	●	●	●		●			
Microsoft Teams	●	●	●	●					
Google Meet	●	●	●	●					



Technology & Accessibility



Technology

- Ease of use for audience
- Attendee's comfort level with technology
- Do you need to arrange a pre-meeting tech check?
 - Or send an [instructional video](#)?
 - Or user manual?

Accessibility

- Connectivity
- Device(s)
- Attendee environment
- Latest version of platform
- Time zone



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Timeline for Meeting Preparation



Technology & Accessibility

- 5-7 days before (tech check?)

Agenda

- 3-5 days before

Ground Rules / Meeting Etiquette

- Along with agenda

Pre-meeting reading / Preparation

Meeting reminder

- One day before

Final reminder (Optional)

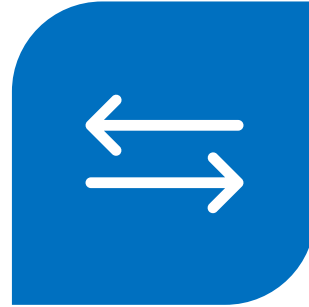
- One hour before

It is safer to err on the side of overcommunication especially if your attendees are new to your virtual meetings. After a period of familiarity, you can reduce your pre-meeting communication.

The Importance of Ground Rules



THE GROUND RULES/GUIDELINES YOU SET WILL DETERMINE THE ENGAGEMENT LEVELS OF YOUR ONLINE MEETING/SESSION



IT IS RECOMMENDED YOU REPEAT THE GROUND RULES/GUIDELINES IN YOUR COMMUNICATION (REFER TO TIMELINE)



LIKE IN-PERSON MEETINGS, YOUR GROUND RULES/GUIDELINES WILL BE YOUR LIFELINE WHEN DISTRACTIONS, DISRUPTIONS OR UNACCEPTABLE BEHAVIOR ARISE



STRIKE A BALANCE WHEN IMPOSING GROUND RULES/GUIDELINES

Strict like rules in a classroom

Totally relaxed and not enforced



Ground Rules, Guidelines or Etiquette?

- Ground rules are guidelines you set as the host/facilitator/leader of your meeting and attendees are strongly urged to adhere to
- Etiquette prescribe socially acceptable behaviors (manners) that are encouraged (may or may not be strictly enforced)
- As a facilitator of adult learning, the word “rules” may trigger people and we suggest using “guidelines”
- For other audiences, such as children or mixed groups, you may consider using the term “ground rules”



Web Conferencing Best Practices

- Check your microphone & speaker settings before the meeting
- Plug your computer into a power source
- Use a headset in crowded/public spaces
- **Mute your microphone** when not actively speaking
- Be aware of your surroundings and behavior (**We can see you!**)
- Add questions/comments in "Chat" section to be addressed by moderators
- "Raise hand" if would like to address the group
- Make comments short and succinct, mute for responses

Agenda Activities

Like an In-Person Meeting

 Pre-meeting preparation/reading

 Round Robin

 Group Discussions

 Keynote speakers/presenters

 Demonstration

 Presentation (PowerPoint)

 Share handouts

Potential Challenges

- Attendees may forget
- Not everyone will have video on
- Attendees may speak over each other
- May present too much information
- Technology failure
- People may check out
- Attendees may not have access



Summary: Virtual Session Purpose and Outcomes

- Spend sufficient time to plan your meeting: objectives, outcomes and your intention
- Consider your participants' technology and accessibility
- Ground rules are very important!
- Set timeline for your virtual session communication
- Consider ways to engage your participants with different agenda activities

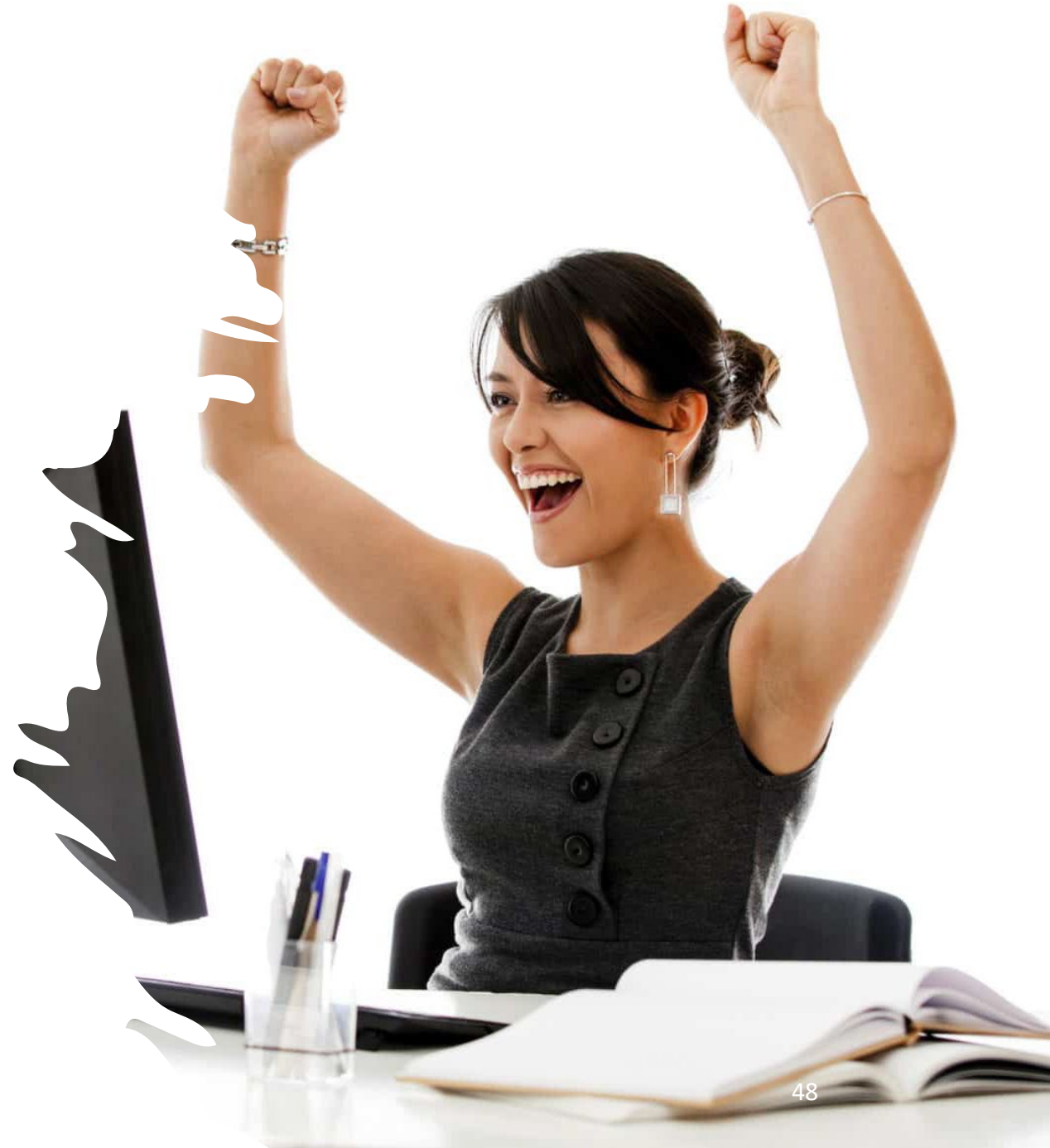


III.
Mastering
Online
Facilitation



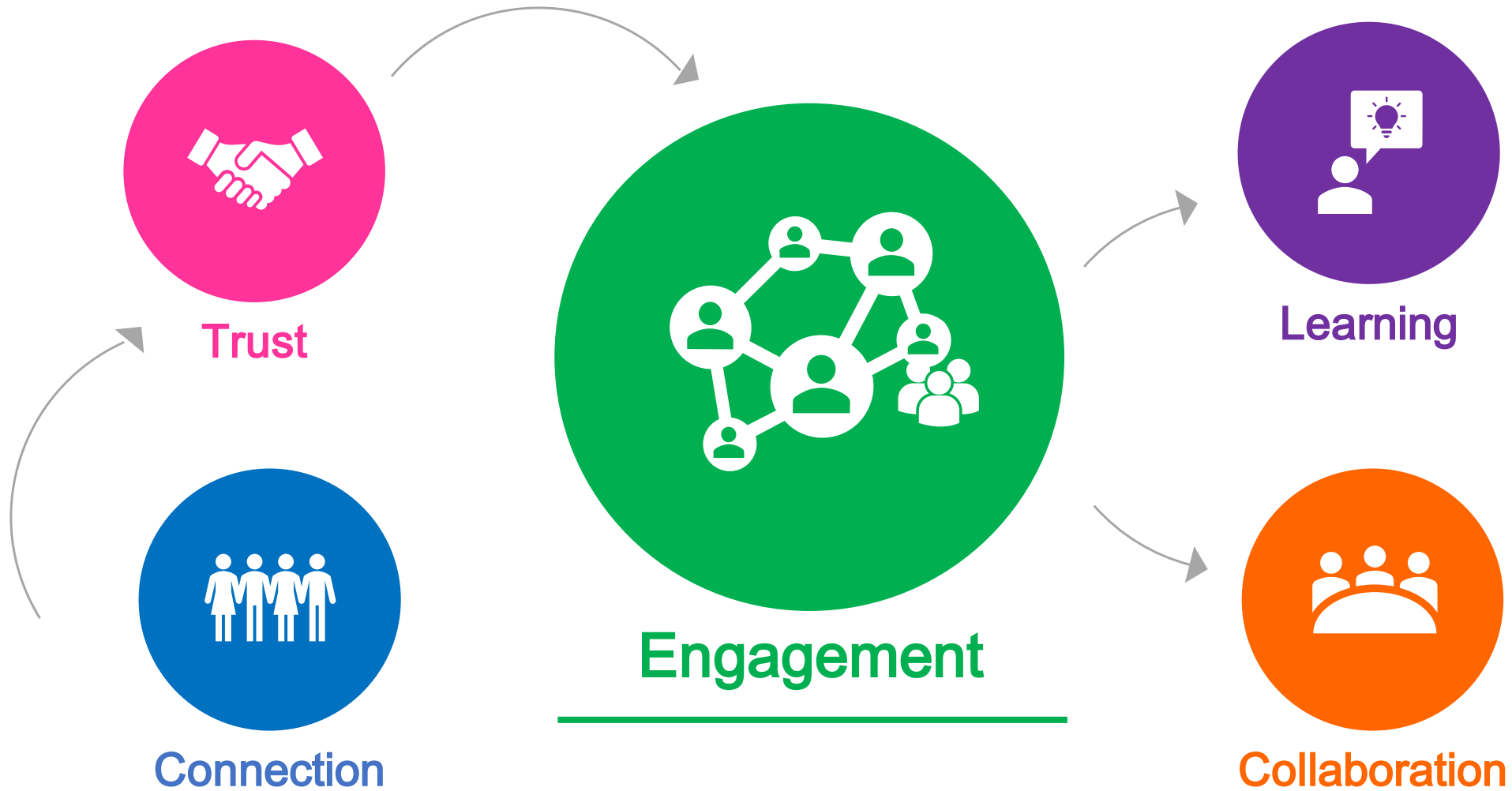
Why Is Engagement Important?

- What are the engagement tools you have noticed so far?
- What happens to you when you are engaged?
- What makes you disengage or disconnect?





Engagement is KING!



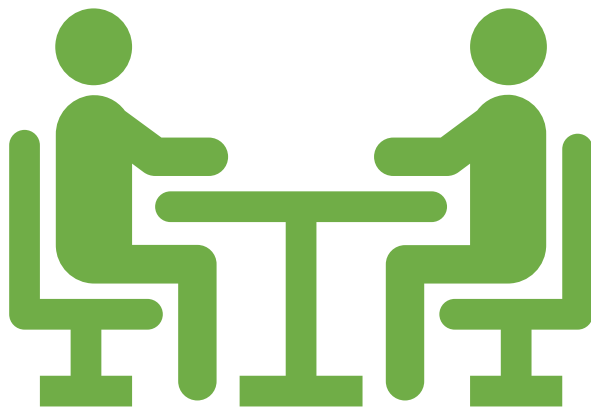
Breakout Session

(In Pairs) – 5 Minutes

Share:

From your experience as a facilitator/leader, the engagement factors from **in-person meetings** that you found most effective

List all the factors to share with the group



Connection



Connection

TRY THIS:



All attendees feel welcome and that they belong

- Warmly welcome each person as he/she joins
- Make sure everyone is acknowledged
- Create connection before meeting (communication, call)



Attendees feel commonality with others

- Connect attendees with each other
- Notice commonalities such as location, home situation
- Pre-arrange breakout rooms

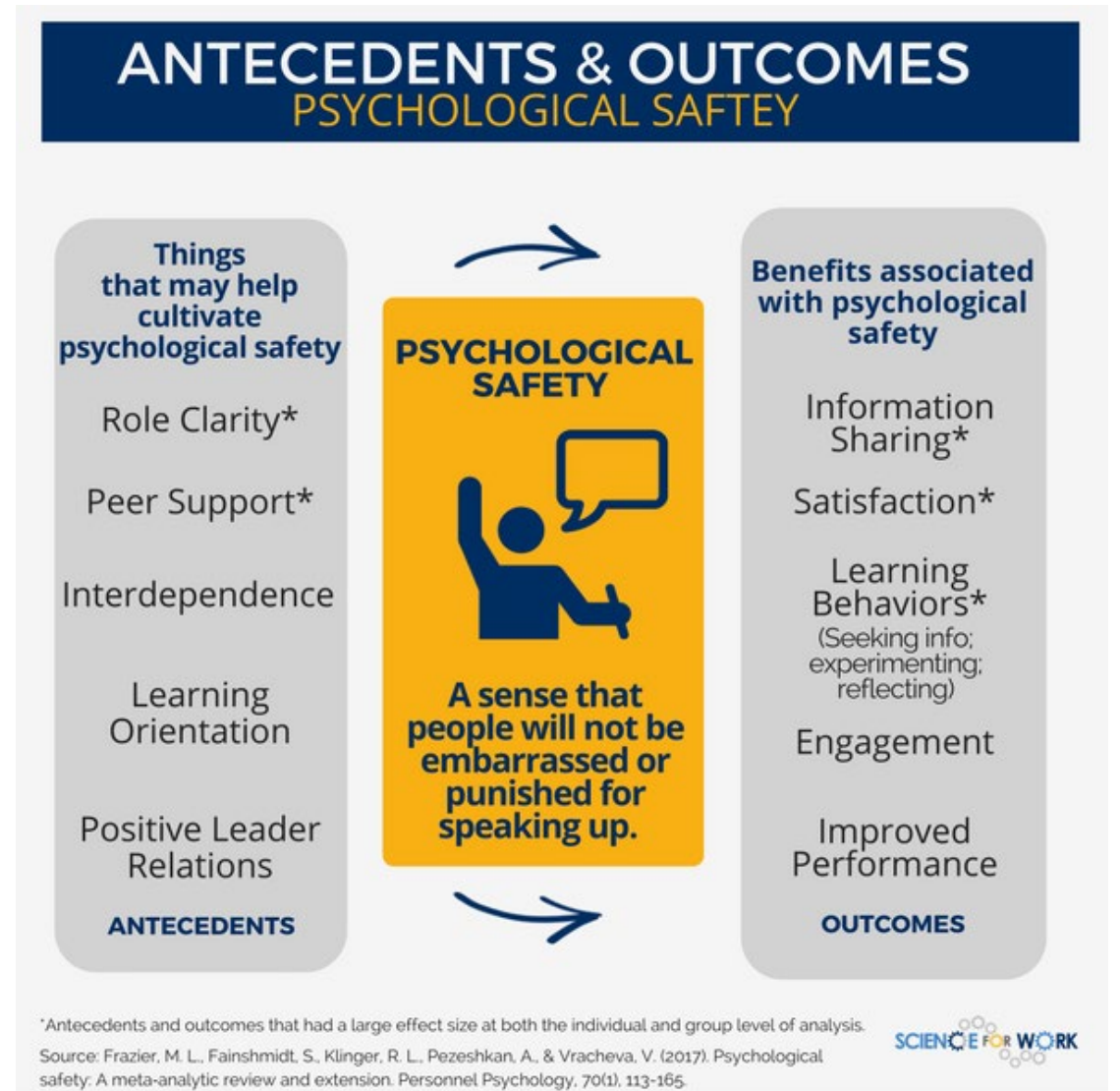


Rituals that include everyone

- Playing music (arrival, breaks, intros)
- Group check-ins
- A grounding exercise or meditation
- Fun energizers (show us your workspace)

Trust

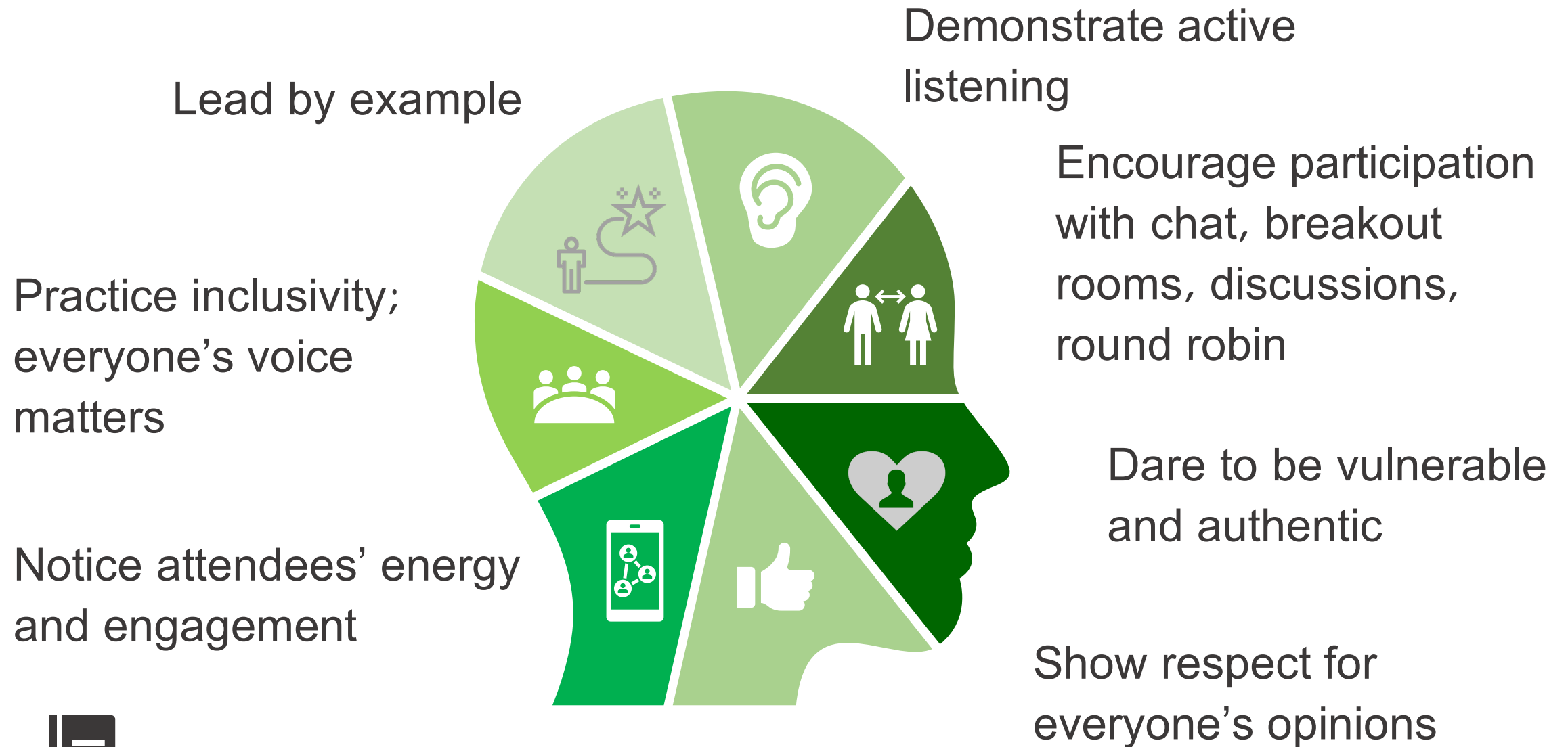
- Of the five key dynamics of high performing teams that Google researchers identified in 2014, **Psychological Safety** was fundamentally the most important component
- In the virtual space, it is vital that you create a safe space for attendees to collaborate



How to Create Virtual Psychological Safety



Ways to Create Psychological Safety



Virtual Engagement Tools

1. Video
2. Chat
3. Breakout Rooms
4. Polling
5. Whiteboard
6. Spotlight Rooms

Others:

- Share screen
- Music
- Group discussions
- File share
- Document camera
- Any others?



Virtual Collaboration Tools



1. Brainstorming and Visual Collaboration

Mural, Miro, Stormz



2. Team Communication and Information Sharing

Slack, Blink, GoogleDocs



3. Scheduling

Calendly, Doodle



4. Quiz and Polling

Slido, Quizizz

Tips for Increasing Engagement



- Use ice-breakers and energizers
- Bring your TOP GAME
- Chart attendee participation
- Journal or draw
- Socializing during coffee/lunch breaks
- Use visuals (keep data simple; supplement with pre and post reading)
- Toggle between sharing screen and interacting with attendees
- Limit speaking time to 10 mins
- Use breakout rooms creatively

Top Engagement Challenges

Technologically challenged

Internet connection

Video off

Multi-tasking

Unprepared / show up late

Look bored / disconnected

Talking over each other



Tech Check



Ground Rules



Engagement
Tools

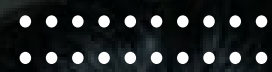




Summary: Mastering Online Facilitation

- Engagement is KING!
- Connection and trust support engagement, which leads to effective learning and collaboration
- Ensure attendees feel connection and create psychological safety
- Plan engagement tools based on agenda items
- Practice virtual collaboration tools and have fun!





IV. Practice Sessions



Choose One:

1. Starting a meeting with an ice-breaker
2. Managing a discussion with comments from the group
3. Arranging breakout rooms and bringing groups back for debrief
4. Sharing content and toggling from screen and group



Thank you for Joining!

- Please share any final remarks
- A copy of this presentation will be available for download
- Reach out to us if you need any follow up
 - Review this content and practice with a buddy within a week
 - Please give us your feedback by completing online survey
- Wish you the best for your next virtual meeting!