Master the Art of Facilitating
Productive and Engaging Virtual
Meetings

Virtual Facilitation Foundation Skills

PARTICIPANT WORKBOOK

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Introduction

A New Reality

Our unprecedented global phenomenon has forcibly catapulted a near 100% virtual and remote way of working into existence for many knowledge workers in 2020.

As businesses scrambled to manage an abrupt transition to remote work, we faced the challenge of setting up a home office while maintaining productivity and among this extreme adaptation to a new way of working, virtual meetings have been a formidable tool for business continuity.

Conducting meetings on Zoom, WebEx, Microsoft Teams and other video conferencing platforms has presented many challenges such as reduced participation of introverted team members, technical glitches, the inability to read body language, video call fatigue, to name a few. However, when rightly skilled and well-practiced, video conferencing can be a highly efficient, cost-effective and productive communication tool for leaders and teams.

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Adapting to the New Normal

Being forced into a new reality has made us more innovative, adaptable, resilient and certainly, more creative in maximizing our existing tools and resources. From our current trajectory, it appears that virtual meetings will remain firmly cemented in business life and remote work will continue to expand.

While we will be addressing the challenges remote work and virtual meetings, this workshop is designed to have you experience the multitude of advantages online meetings can offer as well as increase your ability to leverage this skillset for increased productivity, team engagement and business continuity.

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Notes

"Zoom had over 300 million meeting participants per day in 2020."
– Bloomberg Technology

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

What are your expectations of today's workshop?

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Your Resources

A companion to this workbook is your *Resources Toolkit* which contains checklists, charts, templates and reference guides for you to refer to for each section. This toolkit was created to save you many hours of time of preparation, planning and to ensure you have the guidelines needed to run an effective and productive online meeting.

Our live facilitator led workshop is in THREE (3) sections:

1. Role as a Facilitator
   a. Mindset
   b. Presentation
   c. Preparation
2. Virtual Session Purpose and Outcomes
   a. Meeting Planning
   b. Ground Rules / Meeting Etiquette
   c. Agenda Activities
3. Mastering Online Facilitation
   a. Technology
   b. Engagement
   c. Interactive Tools

When you see this symbol, you can refer to the page number indicated in your Resources Toolkit.

We recommend that you refer to this workbook during the workshop to make notes. We hope that these materials will be valuable and practical resources for your next virtual event.

Our Online World Today

The video conferencing market is especially valuable within the B2B, B2C, education and healthcare sectors. In addition to increasing team collaboration, video conferencing tools are used for external communication, to conduct interviews, for employee onboarding and to create training webinar events.

Video conferencing tools save time that would normally be spent commuting or securing and setting up meeting rooms. This new form of communication may also prevent miscommunication, increase engagement, and allow team members to join online meetings anywhere from their preferred devices. Web conferencing is quickly becoming the new standard in meeting formats, replacing standard conference room meetings or audio conference calls. (Source: The State of Video Conferencing in 2020 – GetVoIP)

Such a powerful tool also brings challenges and resistance to a previously known and practiced way of collaborating, brainstorming, team building, learning and communicating.

Let us acknowledge the challenges and learn how to resolve the difficulties of online collaboration while embracing all the benefits it has to offer. Moreover, we hope that you adopt the right mindset that will place you in an advantageous position in leading this modern way of guiding, communicating and connecting with others.

Benefits and Challenges of Virtual Facilitation

Role as a Facilitator

Your Mindset

1. This is an inclusive, efficient and flexible way of communication 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 meeting in person

4. This was forced upon me so I will have to endure it until work gets back to normal

5. Virtual communication is difficult and I will never be able to master this

Your Professional Presentation

It is worth repeating how important your visual presentation is when using this communication channel and we will highlight the key features of ensuring your presentation is professional and optimal for achieving engagement and reflecting your unique persona/brand.

Your Set Up

- Lighting, background, screen positioning

Your Attire:

- Appearance, features, accessories, colors

Your Body Language:

- Posture, gestures, eye contact

Your Actions:

- Writing, drinking, texting, eating

How important is it to look good on camera?

Your Preparation

Ensure your physical space is set up properly to support you for the duration your session:

- 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

What are your preparation rituals?

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Summary: Role as a Virtual Facilitator

Virtual Session Purpose & Outcomes

Sometimes, planning a virtual meeting only requires booking a time slot in your WebEx (or Zoom) account and inviting a couple of meeting attendees. This may be the case for you for regular team update meetings or informal sessions.

For your important or high stakes online sessions, it is important to spend time to carefully plan your meeting to maximize the benefits such a medium offers and to minimize the challenges and disruptions bringing a group of people from different geographical locations together on one screen may instigate.

Leading a productive and engaging virtual meeting is about taking extra measures to *plan and orchestrate* an interactive collaborative process. When executed well, virtual meetings may very well overtake in-person meeting benefits for efficiency, cost effectiveness, convenience, inclusivity and achieving results.

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"52% of employees surveyed feel more valued or included as a remote contributor in meetings because everyone is now in the same virtual room. This feeling was more strongly held by people in China (65%) and Germany (57%)". **– Harris Poll survey of 2,285 remote workers from US, UK, Germany, Italy, China and Mexico commissioned by Microsoft**

Planning Your Meeting

1. Define meeting purpose and outcome
   - What do you hope to achieve?

2. Confirm the role of Host, Note Taker, Participants and other Observers
   - Who needs to attend? Who will take which roles?

3. Check everyone has the proper equipment
   - Arrange a 15-minute testing time before the meeting if needed

4. Touch base with participants individually to get agenda items

5. Prepare meeting communication
   - Meeting agenda
   - Pre-meeting reading
   - Meeting access information
   - Meeting etiquette

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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?

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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?

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Which Format & Platform To Use?

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?

Online Training and Web Conference Platforms: Feature 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	●	●	●	●					

* This list was compiled by Endurance Learning using free trial subscriptions and does not reflect official claims of features and benefits by the companies who market and sell these products. This list does not constitute an endorsement of any of the above products or companies.

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Technology & Accessibility

Technology:

- What is the ease of use for your attendees?

- What is your 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:

- What is the quality of your attendees' connectivity?

- Which device(s) are they likely to use?

- What is the environment they will be joining the meeting from? (Home, hotel room, conference room)

- Do they need to update the latest version of platform?

- Do you have to deal with time zone issues?

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Timeline for Meeting Communication

1. Technology & Accessibility

2. Agenda

3. Ground Rules / Meeting Etiquette

4. Pre-meeting reading / Preparation

5. Meeting reminder (preparation materials, punctuality, tech check)

6. Final reminder (optional but important to ensure #4 and 5)

7. Other?

Importance of Ground Rules / Guidelines

The ground rules that your attendees agree to follow will greatly influence the quality of your virtual meeting and affect the kinds of interventions you facilitate. **Of all the best practices for virtual meetings, establishing ground rules/guidelines is by far the most important one as it precedes all other practices.**

Rather than assume your attendees will follow common sense meeting etiquette, we recommend **overcommunicating** ground rules/guidelines before and during the meeting, especially for new groups.

Consider this for groups you meet with regularly:

- You may feel they already know the ground rules but you will notice a gradual change in meeting behavior if you skip this a few times
- It only takes a minute to reiterate the ground rules if you feel it is repetitive
- It may be challenging to intervene or use your facilitation authority if you do not have agreed upon ground rules

Ground Rules, Guideline or Etiquette?

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Agenda Activities

When planning your meeting, incorporate different activities to achieve your objectives and consider the context (format), individual attendee's needs, technology, accessibility and contingency plans if challenges arise.

- Pre-meeting preparation/reading

- Round Robin

- Group Discussions

- Keynote speakers/presenters

- Demonstration

- Presentation (PowerPoint)

- Share handouts

- Any others?

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Summary: Virtual Session Purpose & Outcomes

Mastering Online Facilitation

We have, over years of experience, developed a muscle and comfort level with leading in-person meetings and gatherings. With anything you are new or adjusting to, trust that over time, with practice and experience, you will master this relatively new form of online communication.

Participant engagement is the number one challenge facilitators face when leading online meetings with a multitude of additional distractions and factors to manage.

Dealing with connectivity issues, ensuring everyone is prepared and joining the meeting on time, requesting attendees' video participation and monitoring multitasking, all the while keeping track of sharing content, mastering the array of video conferencing tools and presenting cogently, with enthusiasm and authority. No wonder it is a tough task for leaders and facilitators to ascend this steep learning curve.

What do you notice when you are fully engaged in a virtual session?

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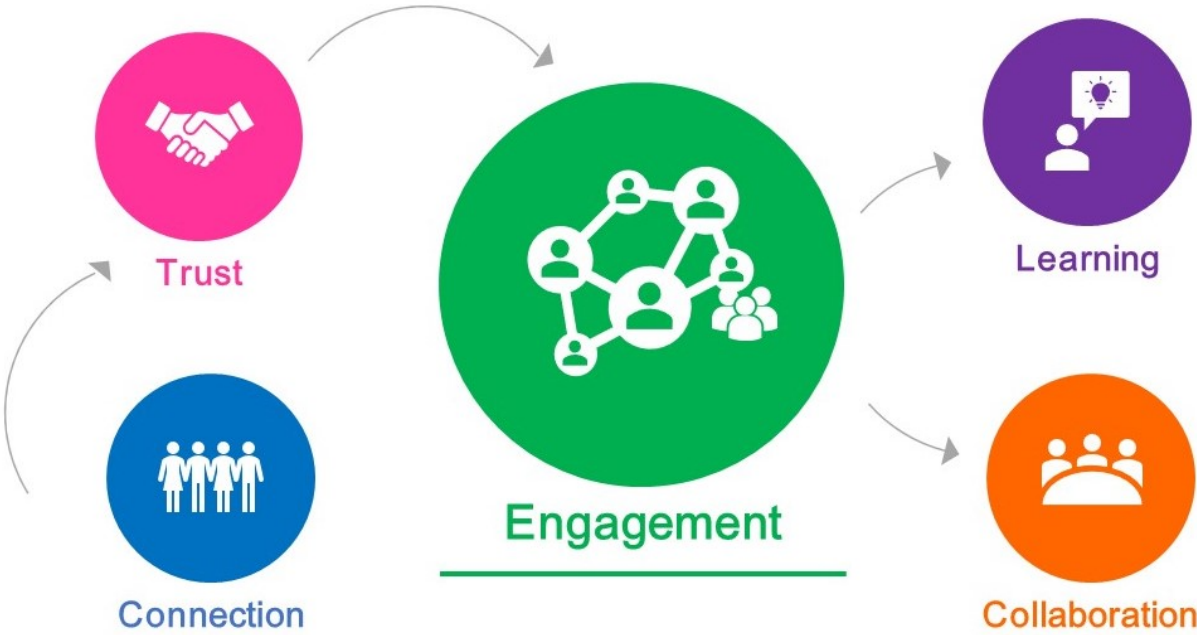_____

What makes you disconnect or disengage?

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Engagement

Build Connection:

Create Psychological Safety

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7.

Virtual Engagement Tools

Tips for Increasing Engagement

My Engagement Challenges	Solutions

Summary: Mastering Online Facilitation

Practice Sessions

Action Planning

Review the contents of today's workshop and identify actions that you will apply.