Planning a Virtual Session - 101

Many people are being asked to hold virtual sessions (meetings, training, etc.) on platforms such as Zoom, WebEx, Adobe Connect, and Skype for Business. There are many reasons for moving to these platforms, from geography, to cutting travel costs, to the home office. Whatever the reason, many have launched into this new communication vehicle treating it just like a phone call, without much thought to how to make it most effective. While I'm not expertly trained on facilitating virtual meetings, I do have a design background and enough experiences to have learned a few things. I'd like to share those with you. I hope they are helpful!

Start with the end in mind: Be clear and identify the objective, outcome, and impact. Being clear on these points help you design the session. After you are complete with the design, come back and see if what you have designed meets these criteria.
- Objective – what is the objective of the meeting?
- Outcome – what do you want to come out of the meeting? New behaviors? Decisions?
- Impact – how do you want people to feel when they leave the session?

Context of Purpose: Get clear on your context for the meeting.
- **What is the purpose of the meeting**? This can be similar to the objective or the outcome, but it helps you get clear on what kind of meeting you are having. Based on the type of meeting you are having, you might design time differently. If you want to make decisions, then you don't want most of your time spent sharing information, and then not enough time to discuss the information in order to make a good decision.
    - Sharing? Decision-making? Training? Etc.
- **Based on the above, what type of questions will you be asking?** Getting clear on the type of questions you will be asking, helps you determine the amount of time you need in different sections based on the number of people. It also helps you determine what types of tools would be best used for the questions. Perhaps you should use polling for Yes/No questions, and be thoughtful about how open-ended questions will be responded to in order to "hear" all voices – chat? Audio?
    - Brainstorming? Yes/No? Open-ended?

Context of Process: It is important to be clear about the factors that play into the processes that you can use to design the meeting. Here are just a few to consider.
- How much time do you have?
    - Over what amount of time? One session, many?
    - How does that play into your purpose and outcome – is it possible to accomplish that in the amount of time you have allotted?
- Who is contributing?
    - Are there presenters? Guests? Videos? Etc.
    - Do they know what their role is? How much time they have?

- o Do they know the meeting platform? Do you need to do a run-through with them before the actual session?
- o Based on their role and the purpose of your meeting, what are the best ways to have them contribute? Before the meeting, during the meeting, in chat, in a video, in a presentation, etc.
- Who is facilitating? Who is taking notes?
  - o Is it someone who has used the platform before?
  - o I prefer to have co-facilitators or at least a note-taker that can watch the chat and call out questions or comments from participants.
  - o The chat is an important function of any virtual meeting. Make sure to set up the virtual meeting in a way that can not only record the session, but also create a capture of the chat discussion.

Context of People:
- Who are the participants?
  - o Do they know each other?
    - If participants do know each other, then find a way to build rapport by asking a question that gets people up to speed about themselves or the work. (What is a key highlight from your summer? What big win have you had on your project?)
    - If participants do not know each other, find a way to build connections and create safety/trust in the group. The opening question might be about something they value in the work, plus where they are calling in from, etc.
  - o Language issues to prepare for?
    - Is the language being used for the meeting a secondary language for any of the participants? How will you prepare yourself, or them for the meeting?
      - Translators needed?
      - Information in multiple languages?
      - Make sure to have them use the "slow down" button?
  - o What is the normal way they work?
    - Are they usually out in a field, working on a plant floor, or in an office? Make sure to get a picture in your mind of the make-up of how participants usually converse and work with others. How can you design the meeting to make them feel more comfortable utilizing the virtual space? How can you get everyone on the same playing field? (You don't want people who are familiar with virtual meetings dominating the conversations because others are not comfortable with the platform.)
    - Are there different cultural norms that could impact participants' involvement, participation or engagement? (Most senior person makes decisions, junior members don't give opinions, etc.) If so, find ways for all to be involved, while not compromising any cultural norms. Sometimes that might mean collecting information or feedback separately in a survey, or with an anonymous poll.
  - o Tech literate?

- What is their level of understanding of technology? Do you need to have a practice session for the technology before the meeting? Or get on 15-30 minutes early for people to check settings, sound, etc.? Getting participants "ready" is an important part to their engagement.
- How many participants?
  - The number of participants drives the design of how people participate and interact, whether you can use video, etc. With numerous people, it might be more important to set up polls and heavily encourage the Chat box. Or perhaps you have fewer people and you are trying to determine a design, or have visual learners on the line – open up a whiteboard and give rights to participants to engage.
- Technology:
  - Do they have adequate bandwidth for video?
    - It's preferred to use video as a means for engaging participants and building community/relationships. Testing video prior to the session can be helpful in planning whether video will be used. If you can't have video the whole time, try just having it open at the beginning and end. It can create a personal connection without compromising the meeting bandwidth integrity. If you can't use video at all, have a slide with everyone's photo on it at the beginning.
  - Are they familiar with the platform?
    - If they have never used the platform, consider a practice session, or written instructions for participating, and make sure they have downloaded any software prior to the meeting!

Other Tips:
1) Learn the features available to you through the platform
   a. How is the default set up? Video, no audio until you click yes, etc.?
   b. Are there options for polls, chatting, etc.?
   c. Recording – learn how to record.
2) Be sure to orient people to the "room" – teach them how to:
   a. Chat
   b. Turn up or down volume
   c. Raise their hand / click the "slow down" button
   d. Take control of the screen / share their screen (if applicable)
3) Start with getting everyone's voice in the room. This is VERY important for building rapport in the meeting and having it feel more like people are in a room together. Have a simple and relevant question that everyone responds to – make it personal + related to the work.
   a. Depending on the amount of time you have, determine whether they should share by chat, voice, poll, etc.
   b. If possible, have everyone use video, even if just at the beginning – it makes people more real and accountable.