Facilitating from Afar

MAKING THE MOST OF VIRTUAL MEETINGS

GETTING MORE FROM MEETINGS

Meetings have long been a key vehicle for achieving critical outcomes and results. Collaboration and tapping into the intelligence, expertise and creativity of each individual is recognized as a key competitive advantage.

But today, more and more of these meetings are happening virtually—and not always with optimal results. Sure, many leaders have mastered the technology. But have they figured out how to effectively

☐ Share information

☐ Solve problems

☐ Generate ideas

☐ Plan actions

in an increasingly virtual world?

And what about you? Does your current approach to virtual meetings give you the results you are looking for? If you are like most people, the answer is "no." Today's business conditions and the increasingly remote nature of work call for next level skills, beyond simply leading or conducting meetings. Instead, the term "facilitator" better expresses the nature of the role and the skill set required of those responsible to make things happen virtually.

And here's a bonus: Master the strategies and techniques outlined here and you'll also take your face-to-face meetings to a whole new level.

The purpose of this e-toolkit is to help you make the most of the virtual meetings you facilitate and better equip you to:

- Prepare yourself and others to get the most out of virtual group meetings;

- Get virtual meetings started in an engaging, focused, and productive fashion;

- Encourage diverse points of view and high levels of participation, even at a distance;

- Provide the structure and control necessary to build focus, consensus, and momentum;

- Close virtual meetings with assurances of follow-up and results;

- And much more.

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SELF-ASSESSMENT

What does it take to effectively facilitate virtual meetings in your organization? This self-assessment will help you assess how well you demonstrate key facilitation skills and behaviors in a virtual context. Respond in the way you think others would answer if they were describing you. Be honest with yourself. No one else will see your responses.

Your Scores

Here are the results of your self-assessment, grouped around four key facilitation skills that ensure virtual meeting results. Review the results, then continue reading to learn how to amplify your strengths and boost those lower numbers.

FOR THE MEETINGS I FACILITATE, I MAKE A CONSCIOUS EFFORT TO:	ALMOST NEVER → ALMOST ALWAYS
1 Develop a purpose and outcome(s) in advance.	1 2 3 4 5
2 Establish rapport and make an engaging connection with participants as they arrive in your virtual meeting room.	1 2 3 4 5
3 Use a variety of features to allow participants to have a 'voice' in the virtual meeting.	1 2 3 4 5
4 Plan in advance how to document the meeting in a way that's meaningful for participants.	1 2 3 4 5
5 Develop and distribute an agenda in advance.	1 2 3 4 5
6 Begin by reviewing & gaining agreement to the purpose, outcome(s) & agenda.	1 2 3 4 5
7 Track and support high levels of participation by all group members.	1 2 3 4 5
8 End on time, always reviewing agreements, accomplishments, and action items.	1 2 3 4 5
9 Plan in advance how you will encourage group interactions and a high degree of visual engagement throughout the virtual meeting.	1 2 3 4 5
10 Begin the meeting by developing or reviewing ground rules.	1 2 3 4 5
11 Adjust the pace in response to cues from the group.	1 2 3 4 5
12 Close by clarifying individual accountabilities and next steps.	1 2 3 4 5
13 Carefully consider who should attend the virtual meeting based upon outcomes.	1 2 3 4 5
14 Set the expectation for a high degree of group interaction.	1 2 3 4 5
15 Manage the flow of the discussion toward achieving the purpose and outcome(s) of the meeting.	1 2 3 4 5
16 End by expressing appreciation for the group's participation.	1 2 3 4 5

Skill	Items
PREPARING FOR OPTIMAL VIRTUAL PARTICIPATION	1
	5
	9
	13
	Total
SETTING THE STAGE FROM MILES AWAY	2
	6
	10
	14
	Total
ENCOURAGING REMOTE EXCHANGE	3
	7
	11
	15
	Total
LEVERAGING THE MINUTES BEFORE LOG-OFF	4
	8
	12
	16
	Total

PREPARING FOR OPTIMAL VIRTUAL PARTICIPATION

Convince Me…

If you think you don't have time to prepare for a virtual meeting, consider the time you'll waste if you don't. Lack of focus, missing information and details, key decision makers and influencers missing, rehashing and backtracking, off base input, muted participants who are taking care of other tasks… these frustrations and time-trashers that plague virtual meetings can be minimized by thinking things through in advance.

The preparation for any effective meeting begins before participants log on. Truly productive virtual meetings are the culmination of consideration and pre-work—on the part of the facilitator as well as the group. Taking the following steps can ensure that you get the most out of the virtual meetings you facilitate.

Do your homework.

Just as with any meeting, it's important to research the issues, history and politics of the situation. Collecting as much background as possible helps you to build on what has already been done and prepare to move the process forward. Getting a variety of perspectives can help round out your understanding. This can be more challenging and important when participants are remote.

So, make a special effort to identify and get to know the virtual meeting participants. And simply because people won't need to travel, don't be tempted to bloat attendance unnecessarily. Given the research-based phenomenon of video conference fatigue (the reality that engaging remotely is more taxing than being face-to-face) choose those whom you'll invite with care.

Ask yourself:

- Who has the knowledge?
- Who has the ideas?
- Who has the responsibility?
- Who has a stake?

Considering these factors will help inform your decisions about your virtual group makeup.

Additionally, becoming acquainted with the participants and their perspectives in advance—even briefly—can help build rapport and give you a basis for anticipating possible dynamics and challenges (which can be even more difficult to address during meetings held remotely). This additional pre-meeting information will allow you to develop strategies in advance that will leave you better prepared for what might occur with your group.

Define the purpose and outcomes of the meeting.

The biggest problem with most meetings—virtual or otherwise—is a lack of clear focus. To feel good about spending limited time, energy, and focus in yet another meeting, most people need to be confident that something will come of the time they invest. As a facilitator, the most powerful thing you can do to set your group up for success is to develop a clear purpose and outcomes for the meeting.

The purpose answers the question, "Why are we having this meeting?" It addresses, in broad terms, what your group is trying to accomplish.

Examples include:

- To develop a strategy for improving customer retention
- To explore options for reducing overhead expenses
- To map out a new loan closing process

In each of these cases, the purpose articulates what the group is working toward and tends to be expressed in terms of a verb. Examples include: to create, develop, identify, solve, implement.

Depending upon the scope of a project, the same purpose statement may be used for more than one meeting. For instance, it may take six or eight meetings to completely map out a new or complex process.

Although multiple virtual meetings may share a purpose, each meeting should have its own unique set of outcomes.

The outcome answers the question, "What will we take away from this meeting?" It represents the tangible take-away from a virtual meeting that ensures focus and continued interest and builds a sense of momentum. Outcomes tend to be expressed in terms of nouns: list, plan, idea, timetable.

Creating a purpose and outcomes for each meeting takes very little time; yet it has tremendous impact in terms of focus and results you can achieve virtually.

Create an agenda.

Creating an agenda is another example of how planning in advance of the meeting can help ensure optimal results. This sometimes doesn't get the same attention in virtual meetings as when people are working face-to-face.

After defining the purpose and outcomes, determine the high-impact topics to cover. For each topic or agenda item, identify:

- Who among the group is best suited to address it?

- What is the best way to address it?

- Sometimes an open group discussion is required. Other times, one or more participants may simply need to share information they have.

- When during the meeting would this topic be best addressed? When possible, handle your quicker or easy-agreement agenda items early in the meeting to build a sense of group accomplishment and momentum.

- How much time will be required to adequately address it? Remember that everything takes longer than you expect. Build adequate time into each agenda item to ensure that it can be addressed completely.

- Develop an intentional strategy for how you'll use visuals and how you'll actively engage participants. (Keep reading for ideas on both.)

Set the best time for the virtual meeting.

Selecting the time for a virtual meeting might not always be within your control. However, when it is, take into consideration how scheduling will impact your group's focus and meeting results.

For instance, how will time zone variations affect the group?

Is it better to arrange for an early morning meeting when the group is fresh? And how early will ensure that everyone is awake enough to contribute?

Or, would a few hours in the workplace provide a greater context for the topics under consideration? And yet, how late in the day might key players be losing steam?

Be sensitive to time zones so no one feels left out or chronically penalized.

Consider necessary roles and potential participants to fill them.

As a virtual meeting facilitator, you're not in this alone. Don't hesitate to include the entire group in ensuring that the purpose and outcomes are met. Your attention during a meeting must be entirely focused upon guiding the group's participation toward its objectives. Yet to do that effectively, time should be managed ferociously, and a record of ideas and agreements must be kept.

Consider contracting with individual participants to be:

- **Timekeeper**—the person who watches the clock to ensure that individual agenda items do not take longer than scheduled
- **Scribe**—the person who records group input during the meeting (in either an analogue or digital fashion using platform features)
- **Action tracker**—the person who captures commitments, action items and necessary follow-up

Consider rotating these roles among group members. Not only will you increase attention during the virtual meeting, you'll also ensure that everyone feels equally invested without anyone feeling burdened by the process.

Finally, don't forget to leverage the role of senior executives or project sponsors. Used strategically—and with appropriate frequency—senior leaders can offer a greater sense of visibility and connection to virtual participants and provide focus, recognition, and motivation to those engaged in long-term or on-going projects.

Expert Excerpt

In many organizations, scheduling yet another virtual meeting is an automatic response to a problem or opportunity. Given meeting overload, you owe it to yourself and your colleagues to consider alternatives. Instead of a meeting you could use memos, e-mails, a website or web pages, telephone calls or one-on-one discussions.

But if you need to draw on the experience, perspectives, or ideas of a number of other people, there's nothing that works quite like a meeting.

— Director, Information Services

Communicate purpose, outcomes, and agenda to all participants in advance.

Having done all of the work and preparation previously discussed, don't keep it to yourself. Help participants be as prepared as possible by distributing information well in advance of the virtual meeting. A standard calendar invitation is not enough.

The following page is a template you can use. Whether using this format or another, for optimal results, your pre-meeting correspondence must include:

- Who called the meeting
- Who is invited to attend
- Date and time
- Purpose
- Outcomes
- Agenda items
- Any pre-reading/work that will help participants prepare to actively participate in the virtual meeting
- What (if anything) participants should have access to

Your preparation and the preparation of meeting participants will ensure that the time that you spend together virtually is as focused, energizing, and productive as possible.

VIRTUAL MEETING PLANNER

Date   Start Time   End Time

Dial-in/Log-on Instructions

Purpose

Outcomes

Attendees

Attendee Preparation

AGENDA ITEM	TIMING	LED BY

TOOL

03

FIRING UP THE FEATURES

Convince Me…

Let's face it. One of the dangers of remote meetings is the predictable nature that many of them take on. Standard agendas. A short slide presentation. A few key contributors. No wonder it's so easy to become distracted. And yet, videoconferencing platforms offer a variety of features that can be used to add interest to virtual meetings when skillfully used.

As you know, videoconferencing platforms offer more than just audio and visual connections. They include a range of features that support effective presentations, training and meetings. Skillful facilitators become familiar with these features and develop strategies to use them in ways that support the agenda and outcomes while enhancing participant attention and engagement.
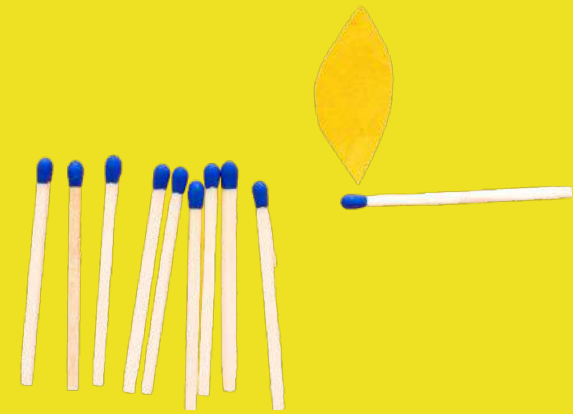
Leverage the value of video.

Video is a central part of videoconferencing. And it's a powerful equalizer as, regardless of organizational level, everyone's tile is the same size. As a result, video can be a strategy for evening the playing field when bringing together people of different levels.

While requesting that cameras be turned on can enhance accountability and connections, most facilitators recognize that it can also enhance anxiety and stress. It's easy to default to allowing participants to make individual choices regarding the use of video. And yet, dynamics shift when some meeting participants are visible and others are not.

So, make a conscious decision before the meeting about the extent to which this feature will support your goals. Not all meetings require video, so let people off the hook in these cases. But when being 'eyeball to eyeball' will help achieve results, set the expectation—in advance as part of the agenda—that cameras should be turned on, so that everyone can prepare for their close-ups.

Encourage screen sharing.

Using a videoconferencing platform is ideal when the group must concurrently look at and work with documents or other visual support. But screen sharing can be used for other purposes. For instance:

• Warm the group up with a digital scavenger hunt. Identify an item or word and see who has it on his/her home screen; then pass the rights to allow the winning screen to be shown.

• Invite a participant who recently returned from vacation to share a few pictures from his/her screen.

Expert Excerpt

Sharing my screen used to be a source of real anxiety for me. I felt kind of exposed and out of control. So, I spent some time really working through the details of the technology. I discovered that I could share just one application in some platforms. But in others, the whole desktop shows up. So, I bit the bullet and just cleaned it up and put a simple photo in the background. I also found the 'do not disturb' button on my computer so text and email previews don't show up at inopportune times.

Chat it up.

Many videoconferencing platforms offer the ability for participants to share their thoughts via text. While it can become distracting if used in an unfocused fashion, this sort of short response sharing can also be used to a virtual meeting facilitator's advantage.

- Use the time while everyone is logging on to warm the group up with a non-work-related question that participants can respond to in a few words. Examples include: What was the highlight of your weekend? What's the last book you read that you could recommend to others?
- Chat is an ideal tool for gathering input when the group is too large or unwieldy for verbal responses. Simply pose the questions and invite participants to briefly capture their responses. You can then unmute individuals to expand upon their contributions.
- Brainstorming can sometimes become chaotic via video. So, lay out the problem or question and have group members share their ideas via chat.
- Close the meeting by asking each person to recap their action items in chat. This builds accountability and provides a written record for follow-up.

Pursue possibilities for polling.

Many platforms also offer polling. And, while this can be an effective tool for engaging presentations and training, a skillful meeting facilitator can make use of it too. Perhaps your group is struggling among potential solutions. Perhaps you want to rank locations for an upcoming off-site. Perhaps you need to set a time for the next meeting. A quick, in-the-moment poll can achieve these content-related objectives while offering variety and increasing interest.

The wonders of the whiteboard.

Finally, one of the most underused videoconferencing features is the whiteboard, a tool that can allow a more organic sense of participation in a virtual meeting. Whiteboards are ideal for:

- **Brainstorming**—Everyone can type or write in their individual ideas.
- **Capturing issues and actions**—An ongoing visual log demonstrates respect for participant contributions while enhancing clarity and agreement.
- **Facilitating fun**—Drawing, doodling and other creative ventures are possible via whiteboarding.

TOOL
04

Convince Me…

On any given day, our minds are already jam-packed with competing priorities vying for our attention. It's a challenge to put other pressing issues aside and deal with the ones on a meeting agenda, particularly when meeting virtually. Even with the best of intentions, focus is frequently compromised and needs as much help as is possible.

SETTING THE STAGE FROM MILES AWAY

The preparation you—and your participants—do in advance provides an ideal foundation for an effective virtual meeting. Use the first few minutes as people join in or logs on to ensure that everyone is similarly focused and ready to make the most of the time together.

Establish rapport.

Make an engaging connection with meeting participants as they join the virtual meeting room. Welcome them and briefly check-in on how they are doing, while still being aware of your start time. Introduce participants to each other as needed. This establishes a human connection that will pay-off with a higher degree of participation and makes good use of what can be awkward 'dead air.'

Review the purpose, outcomes, and agenda.

Although you have distributed the purpose, outcomes, and agenda in advance, you should assume that your participants' attention has been on many other tasks, issues and problems. Reiterate this key information and, if appropriate, gain the group's agreement about how their time will be spent. Allow enough flexibility in the agenda to make modifications that might be suggested by the group.

Develop ground rules.

Ground rules act as behavioral guidelines that set the tone for productive meetings. Many facilitators fail to develop ground rules with their groups—especially when meeting virtually. They argue that, "after all, we're all adults, aren't we?" So, in an effort to be respectful, they set up the conditions where disrespectful behavior can flourish.

The vast majority of participants want to—and will—behave appropriately and constructively.

But, in today's business environment, filled with unparalleled pressure, stress and change, most people appreciate a reminder of the kinds of behaviors that will support the group's virtual results.

Further, if you work with the group to develop ground rules, you have permission to take action if tempers should flare or if other unproductive behaviors surface.

Asking participants for ideas about the kinds of behaviors that will support optimal virtual engagement is generally enough to generate a rich list. To start a discussion, however, you might suggest some of the following:

- Start and end on time—especially important as so many people today are jumping from one meeting or call to the next.
- Commit to 100% attention during the meeting.
- Close all unrelated windows (like email and chat).
- Turn on video (if using an applicable platform).
- Identify yourself when speaking (when voice-only technology is used or when people are unfamiliar with each other).
- Allow one person to speak at a time.
- Respect differences of opinion.

When meeting with the same group repeatedly, it's not necessary to generate this type of list over and over again. Instead, simply:

- Keep the list and review it at subsequent meetings.
- Start each meeting by quickly reviewing the ground rules.
- Ask if the group wishes to add or delete any ground rules currently on the list.

Set the expectation for a high degree of interaction.

It's easy in virtual meetings, for participants to fall into a passive role that won't serve you and the group well in meeting your outcomes. Be clear about the level and type of interaction you are looking for and that will make the best use of your time together. Reinforce the skills and talents participants bring and the importance of volunteering during the meeting.

Expert Excerpt

Your role as facilitator involves pulling together the right participants and creating a virtual environment where their talents, ideas, and experience can accomplish organizational goals. As a result, the volume of talking you do is relatively low. You ask the questions and guide the discussions, but the group generally should carry 90% of the meeting.

Even so, you may have additional background, information you've gathered from others, or developments surrounding the issues being addressed by the group. Sharing that information briefly near the beginning of the meeting provides participants with what they need to participate more productively—virtually or otherwise.

— Marketing Manager

It seems like common sense, but when leading a virtual meeting be sure to join at least five minutes before the start time so schedule yourself accordingly. Identify yourself and welcome participants as they join. Introduce participants to each other if needed. This extra attention sets a constructive tone that will carry over when the meeting officially starts.

— District Manager

ENCOURAGING REMOTE EXCHANGE

Convince Me…

The role of the virtual facilitator involves balancing two distinct—and sometimes competing—demands. On the one hand, you need to encourage high levels of participation from people who are not co-located and, on the other hand, provide the structure and control required to leverage that participation toward achieving the purpose and outcomes of the meeting. Striking the right balance requires skill and practice.

Pause and allow time for responses.

The issues and problems that a good meeting addresses tend to be complex.

Participants may need time to reflect and consider the questions on the table. Yet, as a society, we tend not to be comfortable with silence, particularly in a virtual setting.

Build high levels of participation.

The reason for calling a meeting—virtual or otherwise—is to tap into the knowledge, ideas, skills, and experience of a group of individuals. How can you create an environment where each person is comfortable and able to contribute his or her best?

Use open-ended prompts.

One of the most powerful tools at a facilitator's disposal during a virtual meeting is the open-ended prompt. This type of prompt tends to encourage discussion because it demands more than "yes," "no" or other one-word answers.

Examples include:

- Why is that happening?
- What's your experience?
- Describe your approach.
- Explain how that might work.

Consciously using open-ended prompts helps to ensure that you are really facilitating the participants toward sharing their experience, knowledge, and ideas.

When a facilitator asks a question and the group does not immediately answer, he or she may feel awkward and try to fill that silence with another question or, worse yet, an answer. Instead, simply pause for up to seven seconds. This will generally give your group the "thinking time" they need. If the silence continues beyond seven seconds, ask the group if it would be helpful to restate or rephrase the question. Additionally, you might want to:

- Set the expectation for silence by announcing that you'll provide a short amount of quiet thinking time before you'll ask for responses.
- Post the question in the online meeting space for everyone to see.
- Call on people by name.

Demonstrate respect for participant responses.

Individuals tend to participate best when they feel comfortable, safe and respected. As a virtual facilitator, you can demonstrate respect by:

- Minimizing distractions while participants are speaking by muting yourself and asking others to do the same;
- Maintaining the virtual equivalent of eye contact by keeping your gaze on the screen while participants are speaking;
- Encouraging participants with non-verbal signals like nodding and smiling when your camera is on;
- Really focusing and listening to responses;
- Using participant responses to link ideas together or summarize group discussions;
- Using verbal encouragers and acknowledgments like, "yes", "hmm", "interesting" and "thank you" that help people feel like they've not fallen into a virtual void.

Keep in mind that when the facilitator demonstrates respect, it's contagious. Groups can learn to use many of the same behaviors among themselves, thus creating an even more productive virtual meeting environment.

Paraphrase key ideas and contributions.

Another way to demonstrate respect is to paraphrase key ideas and contributions made by participants. The value of doing this goes further though. Feeding back - in slightly different words - the thoughts shared can help to clarify ideas and focus the group. It also helps those who may have zoned out or lost focus to get the benefit of the contribution.

This skill is particularly useful with participants who may need additional validation to become comfortable participating in a virtual setting. And, paraphrasing can adjust the pace of the meeting and draw attention to ideas that the group may overlook or discount.

Capture issues, ideas, plans, and action items visually.

Capturing participant contributions is an ideal way to encourage participation and create a record for use by the group during the meeting and afterward. Maximize the white board, annotation, and chat tools available through your meeting platform.

Acknowledge constructive participation.

Giving positive attention to the behaviors that contribute to a productive meeting is one of the most effective ways to encourage more of those behaviors. When your camera is on, reward good participation in small ways through smiles and nods. Increase the use of verbal comments like, "thank you" and "that makes a lot of sense"" to reinforce the kind of participation that helps the group achieve its purpose and outcomes. When meeting virtually, be particularly aware of balancing reinforcement across the group or otherwise it can backfire and cause some people to feel overlooked and shut down.

Strategically call on individuals.

When meeting virtually it may be necessary to call on people by name more often.

This is particularly appropriate when:

- You know that a participant has information or ideas that the group should hear;

- A participant has not actively contributed to the meeting.

Unless you're using video conferencing, the non-verbal signals associated with turn-taking and being ready to speak are missing. (And even with video conferencing, delays can create a clunky 'start and stop' talking dynamic as people figure out who's going to speak.) As a result, participants often appreciate the additional structure of knowing that it's their turn to contribute. Just make sure to have set the expectation in advance that you will be calling on them.

When calling on individuals by name, make certain to use the name first, and then pose the question. In this way, you won't embarrass someone who has momentarily taken a "mental holiday."

If available on your meeting platform, use the raised hand status icon to help people in large groups break into the conversation when needed.

VIRTUAL ENGAGEMENT TRACKER

ATTENDEE NAME	CONTRIBUTION

Consider using a roster checklist like the one shown to track the frequency with which participants are making contributions so you can call on individuals to ensure that the entire group remains engaged.

Provide structure and control.

Encouraging participation is central to the success of most meetings. But, leveraging that participation toward achieving the purpose and outcomes requires the guidance and structure provided by the virtual meeting facilitator.

Watch and listen for cues.

A meeting—even a virtual meeting—is full of cues for the observant facilitator. When video conferencing with cameras on, visual cues include facial expressions, degree of eye contact, and although a little harder to detect posture and body language. Changes in tone of voice, volume of responses and types of questions being asked (or not asked) are audio cues. Watch and listen to your group for signs that might suggest possible action on your part. In particular, be aware of signals for you to:

- Refocus on the outcomes and meeting agenda;

- Clarify a comment or question to ensure that the entire group fully understands;

- Dig deeper into or revisit a topic or idea to which the group might demonstrate resistance or apathy.

Adjust the pace as necessary.

As the facilitator, you determine and maintain the pace of the meeting. Sometimes participants will provide clear signals when they've grown tired of a topic and are ready to move along. Other times, you can tell that there's little value in continuing to discuss a topic further. Especially during virtual meetings, picking up the pace in these cases is critical to sustaining the group's level of energy, attention, and focus.

In other cases, you may find that the group is moving too quickly, perhaps gaining consensus without fully exploring the issues or possible consequences of a decision.   Deliberately slowing the pace down with a comment like, "It seems like we got to this agreement just a little too quickly. Should we revisit how we got here for a couple of minutes?" can help a group that might have gotten swept up in something or simply fatigued, to step back and consider the topic more fully.

Build in engagement checks.

Paying attention to meeting participant cues takes some practice and is a good way to start being more in tune with how virtual meetings are going. However, it will only take you so far. The cues you observe are indicators but may not tell the whole story. Another strategy is to pause and ask for feedback about how things are going and then make course corrections as needed. Be sure to check back with participants to ensure that adjustments you have made have hit the mark.

Draw on the purpose, outcomes, agenda, and/or ground rules to help participants focus.

Everyone has attended those virtual meetings that just seem to go off-track. And participants in virtual meetings have little tolerance for this—and a lot of competition for their attention if you, as a meeting facilitator, are not maintaining it.

Your purpose, outcomes, agenda, and ground rules can be a very useful tool for refocusing and reminding people of the value of the meeting. Asking a question like, "How are we doing with our agenda?" is a simple and quick way to help participants refocus. An agenda slide or digital handout can be a useful point of reference to reinforce progress or lack of it.

Expert Excerpt

Although you're the meeting facilitator, you may also have an interest in participating in the meeting beyond that role. This can be challenging because adding significantly to the content of the meeting can compromise your ability to effectively guide the group and optimize participation.

In cases when I want to contribute to the content of the meeting by participating in the brainstorming or sharing your perspective, I like to symbolically join the group as a participant. This involves announcing my change in role from facilitator to participant and asking another participant to temporarily assume the virtual facilitator role.

— Sales Representative

Ask closed ended questions to bring discussions to an end.

Unfortunately, when a discussion has yielded as much information as it can, that discussion doesn't always end. Sometimes you, as the facilitator, need to help bring it to a close. Questions like "Who wants to say the final word on this?" or "It seems like we've exhausted this topic… is it time to move along?" can gently help you transition to another topic.

Ask participants to summarize group discussions.

Getting others involved in summarizing group discussions can be another powerful tool for bringing discussions to a close, getting group agreement to move on and further engaging your virtual participants. Further, it ensures that participants share an understanding of the group's discussion and builds a greater sense of ownership for the meeting and its outcomes. Remember that silence doesn't mean consent, so check for agreement when summarizing group agreements and decisions. This is particularly important virtually when facial expressions and body language may not exist or are hard to read at a distance.
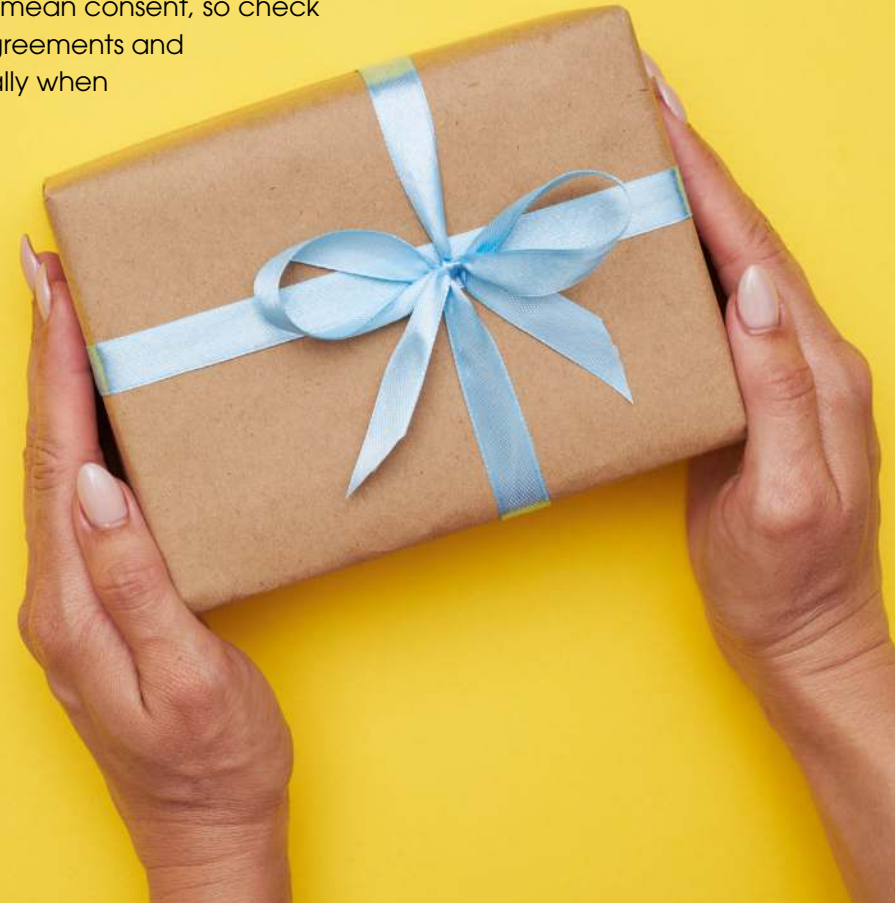
GETTING UNSTUCK

As a facilitator, your job is to keep the group moving toward agreed upon outcomes. This means intervening and taking action when necessary to help the group get un-stuck. A heavy-handed approach to getting things back on track may work in the short term, but generally it will be at the expense of continued constructive participation. Instead, try this range of techniques to get and keep things moving.

Refocus comments and discussions that don't relate to the outcomes.

With an eye toward the purpose and outcomes, listen carefully to how participation feeds into them. When comments or contributions start to stray, respectfully guide people back to the matter at hand.

- "Let's stay on track. How about if we take a look at the next option in this proposal?"
- "That detail will be useful when we get to the second part of the agenda. We'll make sure to discuss it more fully there."
- "I'd be frustrated too. Let's put that at the top of the next meeting's agenda."
- "That's an interesting point. Can you share how it relates to our discussion of…"
- "Thanks for that insight. Now, let's move on to…"

Virtual meeting participants appreciate the structure and redirection that an effective facilitator provides. It supports focus, attention and results.

Convince Me…

You probably don't need much convincing if you've experienced the frustration of limited participation, rehashing, tangents, and all those things that keep you and your virtual group from getting to the results you want. And the other end of the virtual continuum is the when silence creeps in like fog that's hard to see through. Even with thorough preparation, things can slow down almost to a halt.

Unpack the silence.

It's easy to jump to conclusions about why your virtual participation may be slowing down or stopping altogether. But, with more limited cues (even when using video), it's essentials to suspend judgment and do a reality check. That's the only way to choose action that will re-ignite the conversation.

Share your observation with language that's void of blame or criticism with a statement like, "I can't help but notice that the level of engagement on this topic has dropped off considerably."

Ask open-ended questions to determine the cause. One example might be, "What's getting in the way of the kind of rich exchange we need?"

With a clear understanding of what's gotten the group stuck in a more silent mode, you and they can work together to take the steps necessary to open up the virtual conversation.

Refer to the established meeting outcomes and results so far.

The purpose and outcomes of your virtual meeting are a powerful tool for offering structure and supporting focus too. Assist the group by pointing out the gap between what they intended to do and what is happening.

- "Let's take stock of where we are against where we want to be."

  - "We set off with the objective of completing the timetable. We have 20 minutes left and we're still talking about how to introduce this change."

Expert Excerpt

As a facilitator it's easy to take on too much responsibility for the group's behavior. Work at developing a partnership with virtual meeting participants. You should provide the structure that will allow others to work productively—even remotely. This is a great way of keeping people accountable for achieving the results they said they wanted.

— Vice President, Finance and Operations

Conduct a process check.

Especially when meeting virtually, it's important to check in with the group and have processes for stepping back and overtly exploring what's going on.

Meeting ground rules are a great tool for making this happen. You can refer to them and lead a discussion based on comments and questions like these.

- "We seem to be stuck, so let's take a moment to assess what's going on."
- "Let's take a step back and talk about how we are working together."
- "How are we doing against the ground rules?"
- "What would we like to do more or less of?"
- "What ground rules should we adjust or add?"
- "What could we do to get unstuck?"

Help the group evaluate its own effectiveness.

One of the most effective ways to support the performance of virtual meetings is to engage the group in really thinking about how things are going. Consider distributing the following post-meeting survey and discuss the results at the start of the next virtual meeting.
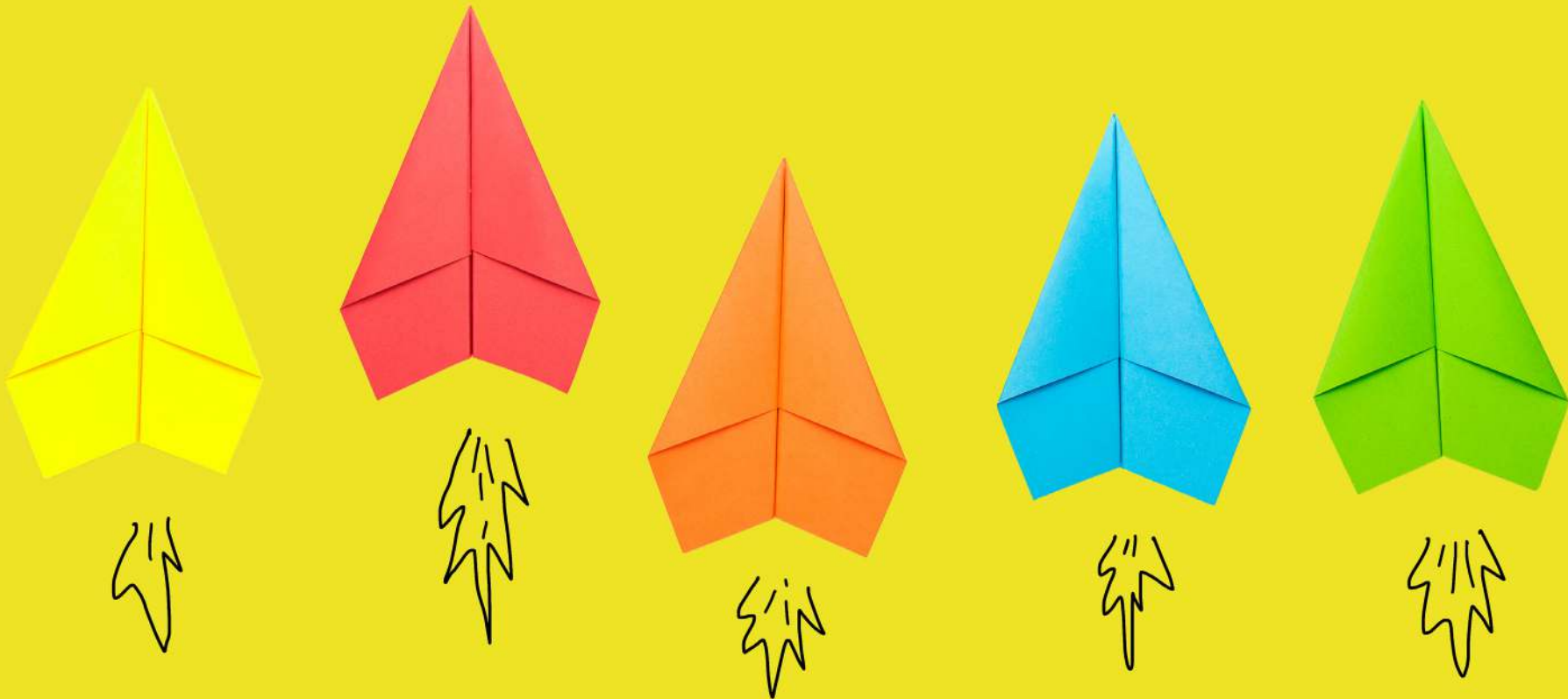
HOW DID WE DO?

Think about how our virtual meeting went. Circle the number that represents your honest opinion. Add your suggestions for how we could improve in the future.

HOW WELL DID WE DO AT:	INEFFECTIVE				EFFECTIVE
1 Accomplishing the results we intended?	1	2	3	4	5
2 Working together as a cohesive team?	1	2	3	4	5
3 Following our ground rules?	1	2	3	4	5
4 Making group decisions?	1	2	3	4	5
5 Respecting the contributions of others?	1	2	3	4	5
6 Staying focused and attentive?	1	2	3	4	5
7 Making action items clear and specific?	1	2	3	4	5
8 Maintaining even participation across the entire group?	1	2	3	4	5
9 Drawing on relevant expertise?	1	2	3	4	5
10 Keeping commitments?	1	2	3	4	5

Suggestions for improving the quality of our future virtual meetings:

MAKING CONSENSUS DECISIONS

Be clear about how the decision will be made.

Aim for consensus when the decisions and solutions call for a high degree of creativity, will be implemented by group members, or require the coordination and support of several people and resources. Clarify what consensus really means. Consensus decision-making occurs when all participants feel they can support a decision without compromising critical needs and values. Consensus does not necessarily mean that everyone is in 100% agreement with all the specifics the decision entails.

Present a summary of the decision to be made by the group.

To keep virtual meeting participants focused and energized, begin by stating what must be decided, why the decision must be made and the timeframe for making it. When meeting via video, consider using a white board to lay out the decision to be made in simple, concrete terms.

Review and refine ground rules.

True consensus can only occur through an open airing of ideas and concerns.

Clarifying and then monitoring ground rules can help people feel that their points of view will be listened to and respected. Possible additional ground rules include:

- Stick to issues and facts.
- Listen to understand before responding.
- Stay open to ideas that are different from your own.
- Voice and be willing to work through your concerns.

Create criteria for the decision.

Criteria will give the group a solid, objective foundation for making a decision. Think of criteria as the requirements for making a selection.

Examples include time to implement, return on investment, cost, and employee or customer satisfaction.

Convince Me…

Gaining consensus is nothing new. But while it's important in face-to-face meetings, it becomes critical when meeting and working remotely. When participants don't feel invested in the decisions being made under co-located conditions, you will observe evidence and be able to intervene. In the virtual world, however, lack of commitment to a decision can go unnoticed until it's too late. Gaining consensus increases your chances for results when people are left to their own devices to implement the group's plan.

Sort criteria into "must haves" and "nice to haves". Develop the criteria with the group then display the list on the whiteboard, if your platform allows for the group to refer to during their discussion. If you cannot show the criteria real-time during your virtual meeting, send it out in advance with your agenda so individuals can have it in front of them during the discussion.

Discuss options or alternatives against the criteria.

Guide a group discussion to evaluate each alternative against the criteria. You might start by eliminating choices that don't meet the "must have" criteria. Keep track of your eliminations on the whiteboard if appropriate. Use open prompts to encourage candid discussion.

- "How does Option A measure up against the criteria?"

- "What is the shortfall of that alternative?"

- "Tell us more about your concern."

- "What are the pros and cons of Option B?"

Refer to the ground rules if things get heated or if some people disengage or become frustrated. Avoid the pressure to move too quickly here. You'll pay for it with a lack of commitment later.

Check for consensus.

As you review options against criteria, the decision the group will want to make becomes clearer and clearer. Check for decision-making readiness by reviewing where the group is in the process.

- "It seems to me that Intelli-Go is coming to the top of the list of potential suppliers. How does that sound to you?"

- "We seem to be close to a decision here. How do you see it?"

- Check with each team member to ensure his or her commitment with a question like, "Are we ready to support that approach? Jim? Barbara?"

When someone remains concerned or seems uncertain, ask clarifying questions to surface any unresolved issues. Ask the group to suggest ways to make the decision more acceptable for that individual.

Use a more structured approach if the group continues to struggle.

Ranking grids can add more structure and order to a difficult situation. Create a grid, like the one shown below on the whiteboard if your platform allows for this. (If not, consider creating it real-time and making it available immediately via email or other sharing tools.) Include 3-4 alternatives down the left side and 3-4 of the most critical criteria along the top.

ALTERNATIVES	CRITERIA				
	COST	TIME TO IMPLEMENT	CUSTOMER ACCOUNTABILITY	RELIABILITY	TOTAL
Phone Survey					
Online Survey					
Site Visits					
Virtual Focus Groups					

Have virtual meeting participants rank alternatives against the criteria, independently first. Alternatives can be ranked against each other (1 = best fits criteria). Collect and average the rankings and post them in the open boxes. Add up the totals for each alternative. The alternative with the lowest score is generally the one the group will decide upon. A sample completed grid follows.

ALTERNATIVES	CRITERIA				
	COST	TIME TO IMPLEMENT	CUSTOMER ACCOUNTABILITY	RELIABILITY	TOTAL
Phone Survey	2	2	4	4	12
Online Survey	1	1	1	3	6
Site Visits	4	4	2	1	11
Virtual Focus Groups	3	3	3	2	11

TOOL 08

LEVERAGING THE MINUTES BEFORE LOG-OFF
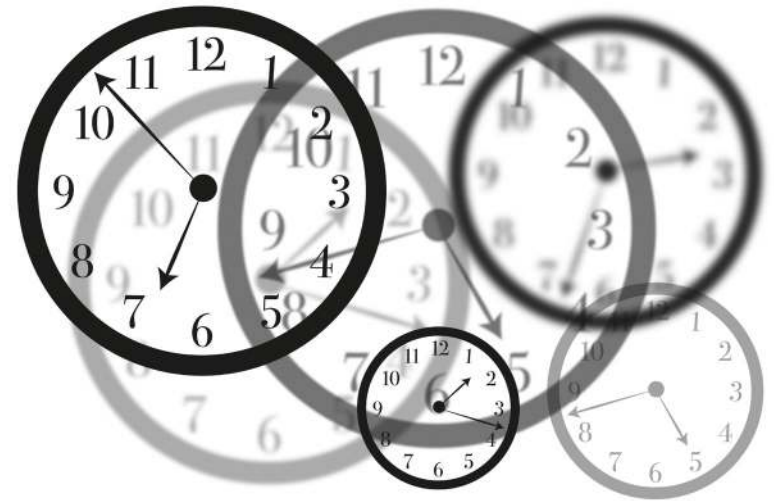
Summarize key agreements and accomplishments.

Ensure that participants exit the meeting with a clear understanding of what they have accomplished and agreed to. This provides a sense of closure while helping the group to recognize that their time together was productively spent. This can also build their confidence in you as their facilitator and guide toward achieving results.

Convince Me…

Meeting wrap-ups rarely get the time or attention they deserve. And when it's virtual, it suffers even more. Five minutes as participants are mentally checking out and preparing for the next call is not a productive close. Ideally you should reserve 15% of your total meeting time to conclude in a way that ensures that the time invested pays off and that participants are inspired (or at least willing) to attend future meetings. This will allow you to end on time and have a clear path forward.

Review and add to the action items developed during the meeting.

Throughout the meeting you or a meeting participant will capture action items identified by the group. Leave enough time at the end of the meeting to review those and to add additional action items to the list. Make certain to include:

- Action item or follow-up step;
- Who will be responsible for assuming each item;
- What, if any, support will be required;
- Timeframe for completing each item;
- How completion of the item will be communicated to the group.

This type of clarity is the only way to ensure that, as virtual meeting participants scatter to their other meetings and tasks, they also prioritize this meeting's commitments and drive group results.

Expert Excerpt

I try—as soon as possible after a virtual meeting—to connect with individual participants. Sometimes it's just a matter of expressing my appreciation for a specific contribution—either to the content or flow of the meeting. Other times, I think it helps to follow-up with individuals who appeared angry, tense, or disinterested during the meeting. In all cases, the one-on-one human connection enhances our relationship and bridges the gaps between group interactions.

Frequently folks are more candid one-on-one. If I can figure out what's going on with them, I can structure future virtual meetings to be more productive. Regardless, though, people seem to feel valued and more comfortable when I take the time to connect between meetings.

— Risk Management Supervisor

Express your appreciation for the group's participation.

Close the meeting in a way that leaves a positive final impression. For example:

- "Thanks for making time to get together. The ideas you generated will surely reduce the shortfall and help this year's numbers."
- "I know how much is competing for your attention and I really appreciate the total focus you each brought to this virtual meeting."

09

BETTER BRAINSTORMING

When done effectively, brainstorming is a powerful tool for helping participants to expand their thinking, explore options, and generate alternatives. Here's how to optimize its potential.

Identify the specific question or topic to be explored.

When working with virtual groups to generate ideas, focus is essential. Create a crisp and clear definition of the situation or problem. Frequently, it helps to frame the problem in terms of a question: "How can we…?" Time spent in advance formulating a clear way to express the question or topic to be explored will pay off during the meeting in terms of focus and quality ideas.

To ensure clarity and focus, make the definition or question visible to the group— either using a whiteboard if your platform allows or by sharing it in advance as part of the meeting agenda.

Set a time limit.

Done well, brainstorming can be energizing and fun. That's why many meeting facilitators tend to let it go on too long. For most topics, you'll need no more than ten minutes to generate a good number of ideas to be evaluated. Setting a firm time limit creates a sense of urgency and keeps participants focused.

Invite ideas from the entire group and encourage a focus on quantity rather than quality.

Brainstorming works best when the entire group is actively engaged and participating—something that's harder to achieve virtually. Be sure to set the expectation when you begin and look for ways to expand participation throughout the brainstorming discussion.

When generating ideas, keep the focus on quantity. Your objective is to create a list of many ideas…not the best ones. Encourage participants to think and speak freely, without self-editing.

Make sure that participants know that during this activity, censoring, evaluation or discussion of ideas are all forbidden. The quickest way to shut down creative brainstorming is to begin figuring out which ideas are the best. During this phase of the process, all ideas — even the silly, boring, and crazy ones — are fair game.

Convince Me…

In face-to-face meetings, brainstorming can be a fun and free-wheeling experience that energizes the group while tapping creativity and arriving at new solutions. Virtually, however, it's a frequently forgotten technique. And when it is done, it can fall flat as participants struggle with turn-taking and facilitators find themselves playing the role of conversational traffic cop.

Very workable solutions frequently grow from some of the most outlandish ideas.

Boost the volume virtually.

The exchange and building of ideas that can occur organically when meeting face-to-face requires a bit more structure on the part of the facilitator. In addition to simply inviting the free volunteering of ideas, consider a few alternatives to enhance brainstorming participation:

- To vary participation and engage people who tend to be more introverted, have people work silently and independently for a short period of time before sharing.

- Use round robin polling, simply going down the list of participants and asking for ideas.

- Use the chat function if available on your platform to allow participants to type their ideas and generate a group list.

- If your platform offers whiteboarding, enable all participants to contribute their ideas to that joint page.

- Consider a pre-meeting idea generation assignment for the issue at hand.

Capture all ideas.

In addition to monitoring the dynamics of the brainstorming session, your most important role is capturing all the ideas that come forth. Make sure to record the ideas so that participants can see, play off, and build on them. If you will be jotting the ideas down, make sure to capture the actual key words spoken by participants as opposed to paraphrasing. It demonstrates respect, builds ownership, and helps to maintain the flow of ideas.

Expert Excerpt

Don't get me wrong. I think brainstorming is a really effective way to generate ideas with a group. I try to use the technique, but spice it up a bit. Rather than doing all brainstorming activities as a large group, I like to break people up into smaller groups with a whiteboard to work on issues and report ideas back to the large group. The discussion that follows is often much richer than the whole group working together.

— Regional Sales Director

FOCUSING WITH VISUALS

Convince Me…

A recent study concluded that 88% of what people absorb and learn is taken in using their eyes. Visuals speed up the process by painting a better or faster picture for participants than words alone. And this is an area in which virtual meetings may be able to perform even more effectively than their traditional face-to-face alternatives.

There are many good reasons to use slides, pictures, illustrations and even videos during your virtual meetings:

- Visuals help participants follow the logic of the meeting. They keep the group focused on the points under consideration.

- Visuals help participants understand key points more thoroughly. They make abstract points more concrete. For instance, statistics are much more understandable when they are illustrated on a visual.

- Interesting visuals enhance participant focus and engagement.

- Depending upon the topic and dynamics, sometimes a meeting will benefit from a moment of levity that a carefully chosen illustration or cartoon might offer.

- Whiteboards can act as a powerful visual record of participants' ideas and agreements while also providing a common focus for the group's attention.

Visuals can enhance a meeting. However, if not used correctly, they can also become a distraction. The following guidelines will help make visuals work for you and your virtual participants.

Choose with care.

Virtual meetings may benefit from more visual elements than face-to-face meetings. This doesn't mean 'death by PowerPoint'. Rather, it means thoughtfully selecting something to appear on the screen that supports the meeting topic and/or maintains participant attention.

Somethings this means a screen with the agenda—and the point you're on clearly highlighted. Sometimes it means the question being discussed front and center. Sometimes it's images, schematics or documents that support what the group is addressing.

When using visuals to interject levity, use particular care. Humor is in the eye of the beholder; so consider your group carefully to ensure that your choice is not inadvertently offensive to any members.

Only show the visual when you are ready to refer to it. Remove or change it when you are finished making that point. Always have a relevant slide that aligns with the group's focus. It's highly distracting for participants to be looking at something that supports a prior point rather than a current one. Use annotation tools if available to guide participant attention.

Chunk content.

Break slide content up into small chunks relating to key points or concepts upon which you'd like meeting participants to focus. This places less of a burden on participants' working memory, making it easier to sustain attention.

Expert Excerpt

Visuals are worth their weight in gold when discussions get heated or when people start pointing fingers rather than dealing with issues. I always make sure to have the problem we're addressing on a slide or whiteboard to focus the attention on the issue rather than on each other. Also, whiteboarding facts and figures that we all agree to can provide a common focal point when tempers flare. This kind of objective data frequently helps people to separate from their self-interests.

—Senior Manager, Research and Development

Less is more.

Use more imagery and fewer numbers and words. Do as much as you can graphically. Maximize white space, the open space surrounding text or images, to make important elements stand out. Keep things as clean as possible, limiting animations to simple fades and transitions if you use them at all.

Engage, don't read.

As with any face-to-face meeting or presentation, avoid reading slide content. Your participants can read faster silently than you can read aloud, nearly ensuring that they'll turn their attention to something else—like email. Make sure that slides only present bullets or images that prompt or reinforce an essential point; then tell the story around them.
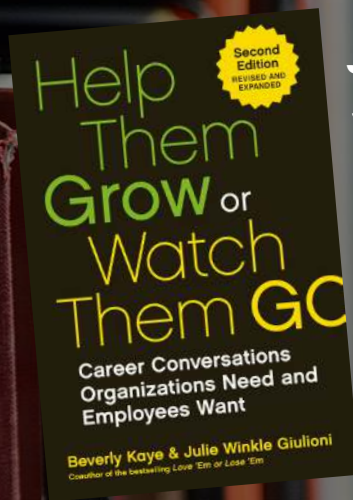
Julie Winkle Giulioni

Julie Winkle Giulioni's mission is ensuring that everyone has the opportunity to learn, grow and develop their potential – so they can fully engage in work and life. She's the co-author of the Amazon and Washington Post bestseller, Help Them Grow or Watch Them Go: Career Conversations Organizations Need and Employees Want.

Julie has been identified by Inc. Magazine as one of the Top 100 Leadership Speakers. She writes monthly columns for Training Industry Magazine and Saba's Talent Space and regularly contributes her thought leadership to The Economist, SmartBrief, Saba's TalentSpace, the Conference Board's Human Capital Exchange and other publications.

Julie also offers thoughts on leadership, career development and more via her blog at https://www.juliewinklegiulioni.com/.

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Julie Winkle Giulioni and Karen Voloshin are co-founders and principals of DesignArounds, a bi-coastal firm that specializes in high-quality, high-impact training on topics including leadership, management, career development, interpersonal skills, and more.

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