

CASE STUDY: IT PROJECT MANAGERS AND SENIOR MANAGERS AT LARGE FINANCIAL SERVICES CORPORATION TURN TO VIRTUAL FACILITATION TRAINING FOR BETTER RESULTS

BACKGROUND

A Fortune 500 company, one of the largest financial services corporations in the world headquartered in the U.S., turned to virtual facilitation training in response to the growing, unique needs of its internal training and global technology department. The department consists of advanced IT project managers and senior managers who lead large internal projects with other business units where group engagement and meetings are rarely conducted in person and, instead, done virtually – a now common environment for many other large, global organizations. Given the multitude and complexity of their meetings and projects, the department realized its need for improved meeting facilitation skills. Several of its employees completed Leadership Strategies, Inc.'s (LSI) facilitation training course, The Effective Facilitator, where the employees met each other in person for the first time. After the training concluded, the department lead and LSI's business development management team recognized an opportunity to maximize continued facilitation training efforts for the department by integrating the use of the virtual



meeting technology familiar to the department employees. The result was the successful pilot course of LSI's The Effective Virtual Facilitator – now renamed to Facilitating Virtual Meetings: Comprehensive – where participants learn how to apply virtual meeting facilitation skills on a virtual platform.

The department expressed the following challenges: keeping group engagement, minimizing dysfunctions, and overcoming difficulties like silent participants, meetings running late consistently, and challenges asking questions effectively – all common pains the department faced in their virtual meetings. In response, LSI developed a new curriculum customized to the department's needs that would allow the participants to learn and practice virtual facilitation techniques using technology.

SOLUTION

A total of three trainings were delivered to 60 employees within the company (approximately 20 participants per course) to teach LSI's 10 Principles of Facilitation now adapted to the virtual user. Led by one of LSI's core facilitators, Wayne Pendle, the training was held for a three-week period – where the sessions took place one day a week for three consecutive weeks (for a total of six sessions) using the following schedule:

Morning Session	8:30am – 11:30am
Break	11:30am – 1:30pm
Afternoon Session	1:30pm – 3:30pm

Each participant received workbooks that corresponded to each of the six sessions. The workbooks were user-friendly and interactive,

allowing for typing “fill-in-the-blank” content as well as areas for taking notes directly onto the document. Additionally, two homework assignments were given – at the end of Day 1 (writing and submitting an opening statement) and at the end of Day 2 (documenting an observed dysfunctional behavior).

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Microsoft Live Meeting was the primary delivery method along with a toll-free dial-in number for voice communications.

OUTCOMES

The participants were overwhelmingly satisfied with the new curriculum. The majority of the 60 participants expressed that a major takeaway and benefit of the learning was the ability to apply the virtual facilitation skills immediately. The following are course evaluation statements:

- Best virtual class ever attended (and we go to a lot of them)
- Kept us involved through a variety of engagement techniques
- Instructor is very knowledgeable of the topics and is excellent in delivering the content
- You didn’t just “tell us” – you “showed us”. Fantastic job modeling the principles.

- Liked how it’s organized across three days – great structure – gave us time to immediately put into practice that week what we are learning
- So impressed and grateful to be given the opportunity to ask questions “real time” and not just wait for a Q&A time at the end. And all my questions were answered!
- Fantastic use of Live Meeting – not only did I learn about facilitation but so much about how to use Live Meeting for all my meetings (polls, whiteboards, Q&A, Shared Notes, Breakout Rooms)

The following are individual testimonials from participants. (Full names are not disclosed due to the privacy policy of the company.)

“I just wanted to take a moment to say thank you for teaching the best class ever! I have had many opportunities to attend some really great trainings in my career. Most of them were classroom training; however, the quality you delivered virtually through Live Meeting can compete with any of the best classroom trainings. I really enjoyed the [...] training and had learned a lot and look forward to attending the next 4 sessions!” – J.F.

“The ground rules and typing in Live Meeting have greatly helped control the chaos on my calls. In fact, people thanked me for conducting the call that way as it made a tremendous difference! Thank you so much for the tips and tricks that you provided.” – D.M.

“I could never quite figure out how to engage the people on my calls – that is, until I attended this course. The ‘Power of the Pen’ principle, specifically ‘record first; discuss second,’ has dramatically changed my meetings. Now, all are engaged and involved. If that was just from one best practice, I can only imagine what using the others that you presented and modeled will do. Thanks!” – B.W.

LSI offers Facilitating Virtual Meetings: Comprehensive for public and private training. For more information, [click here](#).



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Leadership Strategies, Inc. is the U.S. leader in meeting facilitation services, having trained over 18,000 individuals in facilitation skills over twenty years. We provide professional meeting facilitation services for areas such as strategic planning, issue resolution, team building, and other group sessions. We also offer expert training services that help individuals strengthen their soft skills through facilitation.

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