ASTD 2014 ICE | TU103

The Secrets of Virtual Facilitation

Adapted from Leadership Strategies' course, *Facilitating Virtual Meetings*, and *CLICK: The Virtual Meetings Book*

Michael Wilkinson, CMF
Founder and CEO
Leadership Strategies, Inc.
The Facilitation Company

Virtues of Virtual Meetings, 2013 Survey of 438 Executives and Managers

Virtual Reality

56% said that their organization had held more virtual meetings in the past 12 months than they had in the previous 12 months.

75% of respondents said they participated in virtual meetings from their car.

Only 40% indicate they are very comfortable using virtual meeting tools.

93% indicated multi-tasking is an obstacle to successful virtual meetings.

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Session Objectives

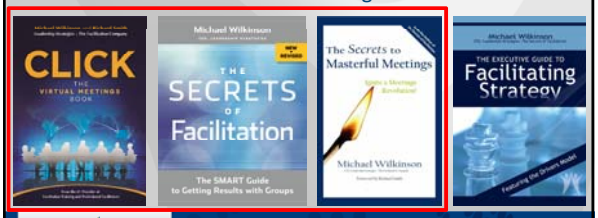
By the end of this session, you will be able to:

1. Use the 6 Ps to prepare for a virtual session, including selecting an appropriate virtual tool.
2. Implement a variety of engagement strategies for virtual interaction to keep participants engaged – not multi-tasking.
3. Use specific ground rules for virtual sessions.
4. Conduct best practices for managing dysfunction virtually.

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Because We Only Have 1.5 Hours…

- Leave your business card to get two white papers, *The 10 Principles of Facilitation* and the 2013 Virtual Survey.
- See me at the bookstore following the session!



Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Standing Poll

How many virtual meetings/sessions have you led or attended in the last **3 months**?

a. None
b. Between 1 and 10
c. Between 11 and 25
d. Over 25

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Why are Virtual Sessions So Different?

1. Getting them to see what they can only hear.
2. Keeping them engaged … when they know you can't see them.

…Special Virtual Meetings

- 1 person is remote and everyone else is present
- Everyone is remote, no one is local
- Everyone is present except you, the meeting leader

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Copyright 2014, Leadership Strategies, Inc.

Facilitating a UK Monitoring Session

- Key Changes in the Environment
- Positioning
- Objectives
- Strategies
- Priorities
- Next Steps

Today's Agenda

I. Getting Started
II. The Virtual Dilemma
III. Preparing for the Virtual Session
IV. Starting the Virtual Session
V. Running the Virtual Session
VI. Managing Dysfunction Virtually
VII. Review
VIII. Next Steps

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Who is Leadership Strategies?

- **Leading provider of facilitators and facilitation training**
- **Over 500** facilitators under contract (FindaFacilitator.com)
- The **most Certified Master Facilitators**
- **Public classes** in Atlanta, Atlantic City, Boston, Chicago, Dallas, DC, Denver, Houston, Los Angeles, Las Vegas, NY, Orlando, Phoenix, San Francisco, Seattle, Sydney, Toronto
- **Private classes** on your site.
- **Over 19,000 trained** in facilitation skills through The Effective Facilitator
- Authors of ***CLICK: The Virtual Meetings Book***

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Today's Agenda

I. Getting Started
II. The Virtual Dilemma
III. Preparing for the Virtual Session
IV. Starting the Virtual Session
V. Running the Virtual Session
VI. Managing Dysfunction Virtually
VII. Review
VIII. Next Steps

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

II. The Virtual Dilemma

Handout Page 5

Face-to-Face Training

- **It's all about: The What, The How, The Why**

WHAT	HOW	WHY
Course Content	**Delivery Methodology**	**Benefit**
The concepts, tools, techniques, and strategies.	The methods the facilitator will use to deliver the content described (e.g., case study, role play, breakout, discussion, etc.)	**Why should the participants care?** Why should this be important to them?

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

The 6 Ds of Learning Transfer

1. **D**efine the business outcomes: training to achieve a goal, satisfy a need or solve a problem?
2. **D**esign the complete experience
3. **D**eliver for application: both theory and practice
4. **D**rive learning transfer: don't fill the box, ignite a fire
5. **D**eploy performance support
6. **D**ocument results; be a business partner

Through Facilitation!

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

II. The Virtual Dilemma

Handout Page 5

Virtual Sessions

- It's all about: **ENGAGEMENT!**

How do you achieve **similar or better** levels of engagement as you would if face-to-face?

Meaningful engagement every 10-15 minutes!

Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com

II. The Virtual Dilemma

Engagement Tools for the Virtual Environment.

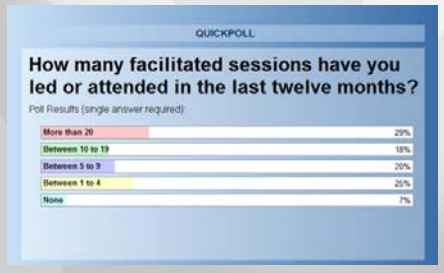
- Polls
- Whiteboards
- Slideboards
- Desktop Sharing
- Round Robins
- Chat box

Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com Copyright 2014, Leadership Strategies, Inc.

II. The Virtual Dilemma

Engagement Tools for the Virtual Environment.

Polls

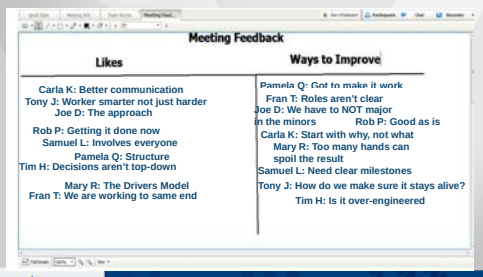


Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com Copyright 2014, Leadership Strategies, Inc.

II. The Virtual Dilemma

Engagement Tools for the Virtual Environment.

Whiteboards



Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com Copyright 2014, Leadership Strategies, Inc.

II. The Virtual Dilemma

Engagement Tools for the Virtual Environment.

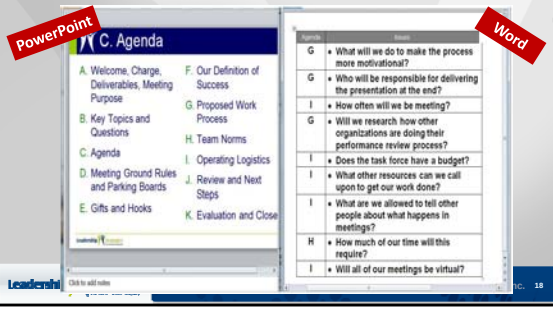
Slideboards

Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com Copyright 2014, Leadership Strategies, Inc.

II. The Virtual Dilemma

Engagement Tools for the Virtual Environment.

Desktop Sharing



Copyright 2014, Leadership Strategies, Inc.

II. The Virtual Dilemma

Engagement Tools for the Virtual Environment.

Round-Robins

- Using a roll call list, round robins and mini round robins are an effective way to engage the participants during a virtual meeting.

My Favorite: The WHIP

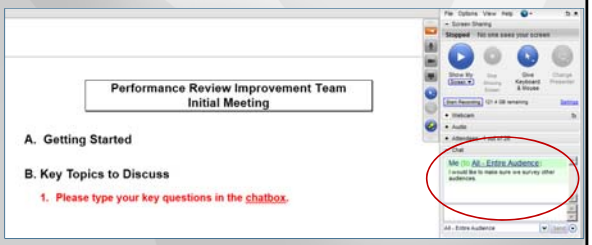
√						Andrea, Atlanta
√						Bill, Boston
√						Cleve, Chicago
√						Ken, Dallas
√						Trina, Denver
√						Vanessa, San Diego
√						Kathy, Atlanta (project manager)

Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com
Copyright 2014, Leadership Strategies, Inc.

II. The Virtual Dilemma

Engagement Tools for the Virtual Environment.

Chat Box



Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com
Copyright 2014, Leadership Strategies, Inc.

II. The Virtual Dilemma

Handout Page 2

A Key: Facilitation

When we created the answers

- 100% Solution – 15% Implemented

When they created the answers

- 85% Solution – 80% Implemented

Why?

Facilitation

ED = RD x CD

Effective Decision | Right Decision | Commitment to Decision

Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com

The 10 Principles of Facilitation

Handout Page 2

- Principle 1. PREPARING FOR SUCCESS
  Cover All the Bases
- Principle 2. GETTING THE SESSION STARTED
  Inform, Excite, Empower, Involve
- Principle 3. FOCUSING THE GROUP
  Establish the Course Avoid Detours
- Principle 4. RESPECTING THE POWER OF THE PEN
  Use It, Don't Abuse It, Make It Theirs
- Principle 5. INFORMATION GATHERING
  Know Your Tools and How to Use Them

Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com

The 10 Principles of Facilitation

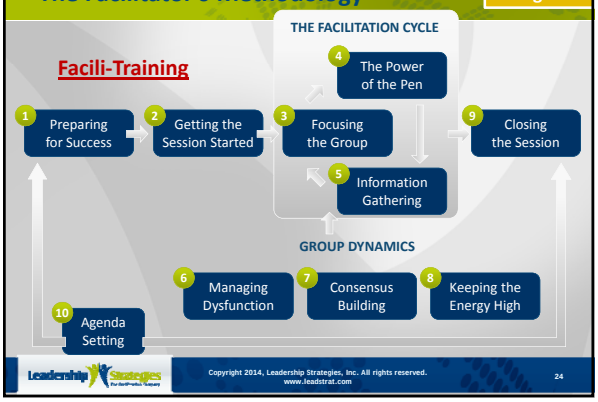
Handout Page 3

- Principle 6. MANAGING DYSFUNCTION
  Conscious Prevention, Early Detection, Clean Resolution
- Principle 7. CONSENSUS BUILDING
  Generate a Consensus-Focused Process
- Principle 8. KEEPING THE ENERGY HIGH
  Set the Pace, Anticipate Lulls, React Accordingly
- Principle 9. CLOSING THE SESSION
  Review, Evaluate, Close, Debrief
- Principle 10. AGENDA SETTING
  Adapt Your Agenda to Address the Need

Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com

The Facilitator's Methodology

Handout Page 4



Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com

Standing Poll

Assume that you have a dozen people that you want to become better at running virtual sessions. What would you want the training to focus on?

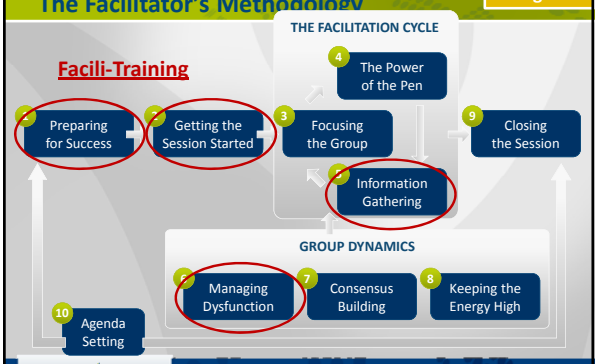
A. Using the Virtual Tool

B. Facilitating Virtual Sessions

Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com
Copyright 2014, Leadership Strategies, Inc.

Handout Page 4

The Facilitator's Methodology



Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com

Today's Agenda

I. Getting Started
II. The Virtual Dilemma
III. Preparing for the Virtual Session
IV. Starting the Virtual Session
V. Running the Virtual Session
VI. Managing Dysfunction Virtually
VII. Review
VIII. Next Steps

Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com

Standing Poll: True or False?

In a virtual session, the most important things to KNOW in order to be fully prepared are the **4 Ps: participants**, the **process**, the (desired) **products**, and the virtual **platform**.

- **Answer: FALSE!**
- **Why:**

  The MOST IMPORTANT thing to know in preparing for a virtual session is the session purpose.

Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com
Copyright 2014, Leadership Strategies, Inc.

Handout Page 6

III. Preparing for the Virtual Session

The 6 Ps of Preparation:

1. **Purpose** – Why are we having this session?
2. **Product** – What do we need to have when we are done?

The Three Hs:
- Hands – What do they need to have in their hands when the session is over?
- Head – What do you want them to know?
- Heart – What do you want them to believe?

Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com

Handout Page 6

III. Preparing for the Virtual Session

The 6 Ps of Preparation:

3. **Participants** – Who will be attending? What are their attitudes?
4. **Probable Issues** – What issues will be addressed?
5. **Process** – What steps will get us there?
6. **Place** – How will you effectively utilize your virtual meeting environment/platform?

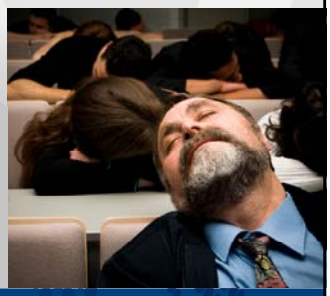
How Do You Choose?

Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com

Choosing the Virtual Platform

Your group's level of engagement and productivity is impacted by:

- The participants' motivation
- The meeting leader's energy and skills
- The engagement strategies used
- The session content
- **The capabilities of the virtual platform**



Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Choosing the Virtual Platform – Levels of Engagement

10 **Face-to-Face**: People can hear one another, see one another, view the same information, provide written input at the same time, work in sub-teams, fully observe non-verbal communication, and physically interact (e.g., shake hands).

8 **Audio, Video and Desktop Sharing, White Board and Breakout Groups**: People can hear one another, see one another, view the same information, provide written input at the same time, and work in sub-teams.

6 **Audio, Video and Desktop Sharing**: People can hear one another, see one another and view the same information.

3 **Audio and Desktop Sharing**: People can hear one another and see the same information.

1 **Audio Only**: People can hear one another (conference call)

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Choosing the Virtual Platform – Product Tiers

1	Full Features	
2	Basic Features	
3	Limited Features	
4	Special Purpose	

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Choosing the Virtual Platform – Product Tiers

1	Full Features	**Includes basic features such as video and desktop sharing, as well as advanced features such as annotation, breakouts, polling, and whiteboards.**
2	Basic Features	
3	Limited Features	
4	Special Purpose	

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Choosing the Virtual Platform – Product Tiers

1	Full Features	Includes basic features such as video and desktop sharing, as well as advanced features such as annotation, breakouts, polling, and whiteboards.
2	Basic Features	**Includes basic features such as video and desktop sharing, but typically does not include one or more of the following: annotation, breakouts, polling, and whiteboards.**
3	Limited Features	
4	Special Purpose	

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Choosing the Virtual Platform – Product Tiers

1	Full Features	Includes basic features such as video and desktop sharing, as well as advanced features such as annotation, breakouts, polling, and whiteboards.
2	Basic Features	Includes basic features such as video and desktop sharing, but typically does not include one or more of the following: annotation, breakouts, polling, and whiteboards.
3	Limited Features	**Excludes one or more basic features such as video or desktop sharing, or supports fewer than fifteen users.**
4	Special Purpose	

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Choosing the Virtual Platform – Product Tiers

1	Full Features	Includes basic features such as video and desktop sharing, as well as advanced features such as annotation, breakouts, polling, and whiteboards.
2	Basic Features	Includes basic features such as video and desktop sharing, but typically does not include one or more of the following: annotation, breakouts, polling, and whiteboards.
3	Limited Features	Excludes one or more basic features such as video or desktop sharing, or supports fewer than fifteen users.
4	Special Purpose	**Provides features for a special purpose or a special audience.**

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Choosing the Virtual Platform – Product Tiers

1	Full Features	• Adobe Connect • Live Meeting • Webex
2	Basic Features	
3	Limited Features	
4	Special Purpose	

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Choosing the Virtual Platform – Product Tiers

1	Full Features	• Adobe Connect • Live Meeting • Webex
2	Basic Features	• GotoMeeting • Click Meeting • 4Webcom
3	Limited Features	
4	Special Purpose	

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Choosing the Virtual Platform – Product Tiers

1	Full Features	• Adobe Connect • Live Meeting • Webex
2	Basic Features	• GotoMeeting • Click Meeting • 4Webcom
3	Limited Features	• Join.Me • Google Hangout • Skype
4	Special Purpose	

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Choosing the Virtual Platform – Product Tiers

1	Full Features	• Adobe Connect • Live Meeting • Webex
2	Basic Features	• GotoMeeting • Click Meeting • 4Webcom
3	Limited Features	• Join.Me • Google Hangout • Skype
4	Special Purpose	• Blackboard Collaborate • Power Noodle • Facilitate.com

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Choosing the Virtual Platform – Product Tiers

- Determine the why, the what, and the constraints.
- View a variety of platforms
- Identify the most critical product features
- Narrow your choices based on product tiers
- Select the platform

	Product Tiers			
	1 Full	2 Basic	3 Limited	4 Special
To maximize engagement, need annotation, breakout rooms, polling, or whiteboard.	√	Eliminate		
To increase productivity, need everyone to see one another and to see leader's desktop.	√	√	Eliminate	
More than 25 people need to attend the virtual meeting at the same time.	√	√	Eliminate Most	√
The virtual meeting platform must be free.	Eliminate		√	Eliminate

Preparing the Agenda…and Detailed Agenda

A. Getting started
B. ~~How does it work~~ today?
C. Strengths / areas for improvement
D. Potential improvements
E. Priorities
F. Implementation plan
G. Close

A.	Getting Started
Process	List the key topics participants want to discuss; group the topics into categories.
Virtual Details	Have participants record their key topics on the whiteboard. Move items on whiteboard into groups.
Timing	10 minutes (2 + (12 issues x 0.5) + 2)

Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com

Using Special Virtual Ground Rules

- **Announce yourself** when joining and if leaving early.
- **Identify yourself before speaking** until voices are familiar.
- **Avoid the "hold" button**, especially when music or other sounds result.
- **Use consistent order** of speakers.
- **Stay 100 percent focused** during the meeting; avoid doing other work, answering e-mails, etc.
- **Remember the remote**.

Tip: Name Card

Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com

Preparing the Virtual Meeting Environment

- Set up the virtual meeting room.
- Distribute the virtual meeting invitation.
- Hold a software prep for the facilitator, if necessary.
- Hold a software prep session for participants to review typical challenges, if necessary.
- Use a moderator when appropriate

Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com

Do You Need a Moderator?

- Assist with chat rooms, polling questions, documentation, maintaining the parking boards.
- Support all technical issues.
- Other considerations:
  - Monitoring activity
  - A second voice for variety
- **Recommended** if eight or more people.

Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com

The Roll Call List

- During the virtual meeting, you will frequently invite each person to speak on a topic (round-robin).
- Prepare a list of participants and locations to use to check-off who has spoken.

√						**Andrea, Atlanta**
√						Bill, Boston
√						Cleve, Chicago
√						Ken, Dallas
√						Trina, Denver
√						Vanessa, San Diego
√						Kathy, Atlanta (project manager)

Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com

Handling Difficult "Room" Setups

Handout Page 7

What if there are only a few virtual participants?

- **Issue:** Virtual participants feel isolated and uninvolved
- **Actions**:
  - Send handouts in advance to remote participants.
  - Have webcam of room and remote participants.
  - Use whiteboards or desktop sharing to show information gathered during the meeting.
  - Consider ground rules such as "Don't forget the remote."
  - Start round robins with remote participants

Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com

Handling Difficult "Room" Setups

Handout Page 7

What if most are virtual?

- **Issue:** Due to the inability to "read the participants" as well, the tendency is a lack of engagement during sessions with many virtual participants
- **Actions**:
  - Use round robins maintaining the same order each time.
  - Use whiteboards allowing remote participants to annotate the whiteboards.
  - Use engagement activities such as "the whip."

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Checklist for Preparing

- Decide the meeting's purpose.*
- Define the meeting's products.*
- Confirm meeting is necessary.*
- Select the participants.*
- Identify probable issues.*
- Develop the process (agenda).*
- Choose the virtual platform.*
- Determine methods and timing.
- Determine meeting rooms, date, and time.*
- Develop and distribute the meeting notice.*
- Hold preliminary discussions beforehand, as needed.
- Prepare the virtual meeting room.*
- Articulate your ground rules.
- Prepare a roll of participants.
- Prepare your opening words.

* Recommended for all meetings

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Today's Agenda

I. Getting Started
II. The Virtual Dilemma
III. Preparing for the Virtual Session
IV. Starting the Virtual Session
V. Running the Virtual Session
VI. Managing Dysfunction Virtually
VII. Review
VIII. Next Steps

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Standing Poll: True or False?

After introductions if necessary, meetings should generally start with a review of the agenda.

- **Answer: FALSE!**
- **Why:**

Start with purpose. (Remember the first "P" of the 6 Ps of Preparation!)

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Copyright 2014, Leadership Strategies, Inc.

The Opening Screen

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

IV. Starting the Virtual Session
Set the Stage With Your Opening

Handout Page 8

- Every time you bring your virtual team together, you must do **four things**…right from the very beginning.

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Copyright 2014, Leadership Strategies, Inc.

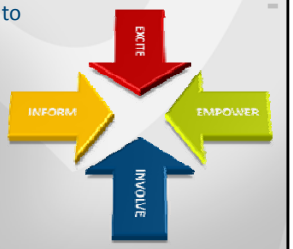
IV. Starting the Virtual Session
Set the Stage With Your Opening

- Through your opening words, you must …
  - **Inform participants about the purpose and product.**
  - "The purpose of this meeting is… When we are done, we will have…"

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com
Copyright 2014, Leadership Strategies, Inc.

IV. Starting the Virtual Session
Set the Stage With Your Opening

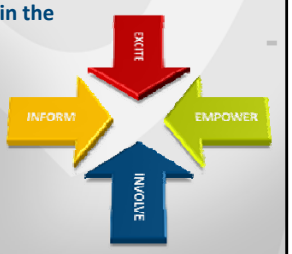
- Through your opening words, you must …
  - **Excite participants about benefits.**
  - What is the overall result to be achieved? WII-FM?



Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com
Copyright 2014, Leadership Strategies, Inc.

IV. Starting the Virtual Session
Set the Stage With Your Opening

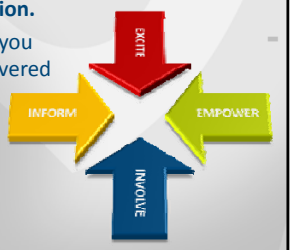
- Through your opening words, you must …
  - **Empower participants by discussing the important role they play in the process.**
  - Why were they selected? What authority have they been given?



Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com
Copyright 2014, Leadership Strategies, Inc.

IV. Starting the Virtual Session
Set the Stage With Your Opening

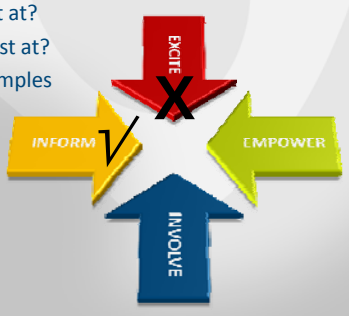
- Through your opening words, you must…
  - **Involve participants through personal objectives and participation.**
  - "What are the key topics you want to make sure are covered in this session?"



Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com
Copyright 2014, Leadership Strategies, Inc.

IV. Starting the Virtual Session
Set the Stage With Your Opening

- Which are we best at?
- Which are we worst at?
- Let's look at 2 examples



Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Excite Example #1

- Good morning, it's a pleasure to be here this morning.
- Our objective for the next two days is to walk away with a plan for improving the hiring process (inform).
- **What is exciting about this?**
- **If we are successful, we will walk away with a new hiring process that will help our organization get the right people hired and get them hired quickly.**

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Excite Example #2

- Good morning, it's a pleasure to be here this morning.
- Our objective for the next two days is to walk away with a plan for improving the hiring process (inform).
- **What is exciting about this?**
- **Today you may have people on your staff who don't have the skills or the attitude you need. As a result, you are having to work much harder to make up for what they aren't doing. This is your opportunity to put strategies in place to ensure that you get the people you need to get the work done.**

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Which is better? Why?

Example 1

- If we are successful, we will walk away with a new hiring process that will help our organization get the right people hired and get them hired quickly.

Example 2

- Today you may have people on your staff who don't have the skills or the attitude you need. As a result, you are having to work much harder to make up for what they aren't doing. This is your opportunity to put strategies in place to ensure that you get the people you need to get the work done.

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Which is better? Why?

Example 1

- If we are successful, we will walk away with a new hiring process that will help our organization get the right people hired and get them hired quickly.

NOTICE THE # OF "YOU" AND "YOUR"!

Example 2

- Today **you** may have people on **your** staff who don't have the skills or the attitude **you** need. As a result, **you** are having to work much harder to make up for what they aren't doing. This is **your** opportunity to put strategies in place to ensure that **you** get the people **you** need to get the work done.

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

IV. Starting the Virtual Session
Set the Stage With Your Opening

With Excite:

Say "you" or "your" at least 4 times!

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Employ All Your Best Presentation Techni

Handout Page 8

- **Turn on your webcam for remote participants to see you**
- Sit tall, don't slouch
- **Speak loudly and clearly; vary your tone and emphasis**
- Avoid speaking too fast or too slow; vary your rate of delivery
- Be animated
- **Make eye contact using the webcam**
- Use defined gestures
- Avoid "self-talk"; avoid filler words (e.g., "ah," "um")
- Avoid extremes in dress and grooming
- Ensure your facial expressions match what you are saying

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Checklist for Starting

- ❑ Start the meeting on time.
- ❑ Deliver the opening, include purpose and products.*
- ❑ Perform a roll call.*
- ❑ Engage the participants.
- ❑ Confirm the agenda.*
- ❑ Review the ground rules.
- ❑ Review the parking boards.
- ❑ Make introductions, if needed.

* Recommended for all meetings

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Today's Agenda

I. Getting Started
II. The Virtual Dilemma
III. Preparing for the Virtual Session
IV. Starting the Virtual Session
V. Running the Virtual Session
VI. Managing Dysfunction Virtually
VII. Review
VIII. Next Steps

Checkpoints
Starting Questions

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Set the Course with Checkpoints

At the beginning of each facilitated process…

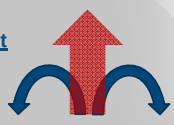
REVIEW → PREVIEW → BIG VIEW

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Set the Course with Checkpoints

- **Review**
  Review quickly what has been done to date.
- **Preview**
  Describe briefly what the group is about to do.
- **Big View**
  Explain how the previewed agenda item fits into the overall objective of the session.

The Checkpoint



Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Sample Agenda

Purpose:
Define the changes necessary to increase the efficiency and effectiveness of the hiring process

Agenda:

√ A. Introduction
B. How does it work today?
C. What are the problems and root causes
D. What are the potential improvements
E. Prioritize improvements
F. Develop implementation plan
G. Review and close

Review-Preview-Big View

- We have just completed…
- Next we are going to…
- This is important because…

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Standing Poll: True or False?

When formulating questions to get lots of ideas, the most important attribute of the question is that it is open-ended.

- **Answer: FALSE!**
- **Why:**

  The key is to formulate a question that helps the participants visualize the answers!

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Copyright 2014, Leadership Strategies, Inc.

The Starting Question

You are interviewing a group of school registrars to talk with them about the scheduling process.
Which is the better starting question? Why?

Question Type A
The first thing we want to talk about are inputs. What are the inputs to the scheduling process?

What the facilitator wants to know

Question Type B
Let's start with… If you were about to develop the school schedule, what is the information you would need to have close by?

Draws an image of the answers

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Copyright 2014, Leadership Strategies, Inc.

Ask Great Starting Questions

Four parts to great starting questions in virtual sessions

1. **Notify who will start responding** (Why is this so important in the virtual setting?)
2. **Begin with an image-building phrase** ("think about," "imagine," "consider," "if")
3. **Extend the image to the answers** (at least two phrases)
4. **Ask the direct question** (Type A) to get the information you want

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com
Copyright 2014, Leadership Strategies, Inc.

Ask Great Starting Questions

Scenario: You want the participants to identify the steps in the hiring process.

What is the Type A question?

- "What are the steps in the hiring process?"

What image-building phrase can you use?

- "Think about the last time you hired someone."

How do you extend the image to the answers?

- "Think about all the things you had to do to get that person hired, all the steps you had to go through, all the people you had to talk with, the forms and everything…"

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com
Copyright 2014, Leadership Strategies, Inc.

Ask Great Starting Questions

Scenario: You want the participants to identify the steps in the hiring process.

The Type B Question

- "We will start this with… Think about the last time you hired someone. Think about all the things you had to do to get that person hired, all the steps you had to go through, all the people you had to talk with, the forms and everything… What are the steps in the hiring process?"

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com
Copyright 2014, Leadership Strategies, Inc.

Ask Great Starting Questions

- When do you use a Type B?
  - At the beginning of every agenda item
- It takes preparation!
  - If you don't prepare, you will most likely use a Type A
- Create a list of Type B questions for the standard sessions you facilitate.

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com
Copyright 2014, Leadership Strategies, Inc.

Today's Agenda

I. Getting Started
II. The Virtual Dilemma
III. Preparing for the Virtual Session
IV. Starting the Virtual Session
V. Running the Virtual Session
VI. Managing Dysfunction Virtually
VII. Review
VIII. Next Steps

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

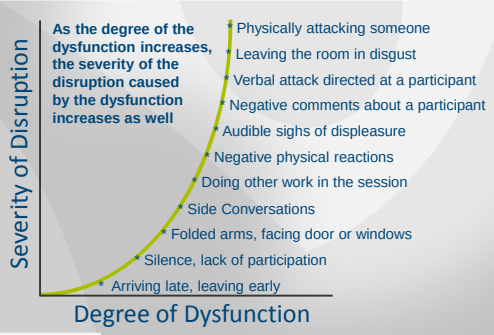
Standing Poll: True or False?

It's best if NO dysfunctions occur during a meeting.

- **Answer:** TRUE!
- **Why?** The best dysfunctions are those that don't occur.

Copyright 2014, Leadership Strategies, Inc. All rights reserved.
www.leadstrat.com

Dysfunctional Behavior



Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com

Understanding Dysfunctional Behavior

Handout Page 10

*Dysfunctional behavior is any activity by a participant that is consciously or unconsciously a **substitution** for expressing displeasure with the session **content**, the facilitation **process**, or an outside **factor**.*

Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com

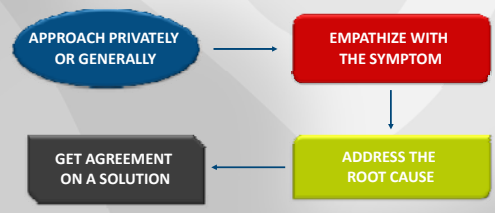
Separate Symptom from Root Cause

- Treat dysfunctional behavior as a sign that the participant is asking for help
- The participant is waving a red flag that is masking the real issue **(root cause)**
- Dysfunctional behavior is a **symptom**
- Dysfunctional behavior tends to get worse over time

Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com

Address Dysfunction Effectively

The general formula for addressing dysfunction:



Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com

Dysfunctions

- Late Arriver / Early Leaver
- **Drop-out***
- Loudmouth
- Storyteller
- Broken Record
- **Naysayer***
- **Chatter***
- Workaholic
- Verbal Attacker
- Door Slammer
- Physical Attacker

Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com

Dealing with Virtual Dysfunction Types

Handout Page 10

Dysfunction	Suggested Action
Drop-out Maintains silence, fails to participate	- Remind the group of ground rules. (Everyone speaks.) - **Employ a round-robin** brainstorming activity to get everyone involved. - Do a mini round-robin. - Discuss privately during break to ensure there is not an additional problem.

Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com

Dealing with Dysfunction Types

Handout Page 10

Dysfunction	Suggested Action
Naysayer Demonstrates negative physical reactions, voices audible sighs of displeasure	- Say with optimism, or jokingly, "It appears that we have some concerns about this alternative. Let's talk about it. What are the issues?" - Seek buy-in by asking, **"How can you make it better?"** - At the break, attempt to reach a solution in which the person will openly speak about concerns during the group session. - Be sure to get all the issues out.

Workbook page 16

Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com

Dealing with Dysfunction Types

Handout Page 10

Dysfunction	Suggested Action
Chatter Holds side chats	- Remind the group of ground rules. (Respect the speaker.) - Discuss privately during break to ensure there is not an additional problem.

Some forms of the Chatter may not be dysfunction in the virtual world!!!

Workbook page 16

Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com

Today's Agenda

I. Getting Started
II. The Virtual Dilemma
III. Preparing for the Virtual Session
IV. Starting the Virtual Session
V. Running the Virtual Session
VI. Managing Dysfunction Virtually
VII. Review
VIII. Next Steps

Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com

Review: Secrets of Virtual Facilitation

- The What, the Why, the How
- 6 Ds of Learning Transfer
- Polls
- Whiteboards
- Slideboards
- Desktop Sharing
- Round Robins
- Chat Box
- ED=RDxCD
- 10 Facilitation Principles
- 6 P's of Preparation
- Choosing the Platform
- Detailed Agenda for Virtual
- Ground Rules for Virtual
- Preparing the Virtual Environment
- Using a Moderator
- Roll Call List
- Difficult "Room Setups"
- Checklist for Preparing
- Inform, Excite, Empower, Involve
- Checkpoint
- Great Starting Question
- Defining Dysfunction
- Addressing the Dropout
- Addressing the Naysayer
- Addressing the Chatter

Copyright 2014, Leadership Strategies, Inc. All rights reserved.

DONE! Review Session Objectives

1. Use the 6 Ps to prepare for a virtual session, including selecting an appropriate virtual tool.
2. Implement a variety of engagement strategies for virtual interaction to keep participants engaged – not multi-tasking.
3. Use specific ground rules for virtual sessions.
4. Conduct best practices for managing dysfunction virtually.

Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com

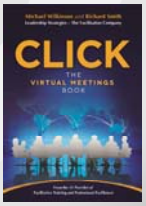
IX. Next Steps

Handout Page 14

What's Next? Learn More…

HANDS-ON FACILI-TRAINING
- Facilitating Virtual Meetings: Comprehensive
- Facilitation Skills for Trainers
- The Effective Facilitator

THE BOOK (See you at the bookstore!)
- *CLICK: The Virtual Meetings Book*



VIRTUAL BOOTH for other FREE resources:
- **http://www.leadstrat.com/virtualbooth**
- **Articles** and a coupon for 10% off CLICK: The Virtual Meetings Book

Leave your business card!

Copyright 2014, Leadership Strategies, Inc. All rights reserved. www.leadstrat.com

CONNECT WITH LSI
Leadership Strategies
facebook.com/LeadStrat
@LeadStrat
Leadership Strategies
OfficialLsi
Questions?
800.824.2850
info@leadstrat.com