



Although many of us are managing and mitigating challenges, issues, and crises at the moment, it's not too late to help your team re-coup, re-group, and get organized over the next few weeks. This month's articles can help you create guidelines for your team to work effectively under new circumstances, and even prevent potential problems down the road. As we hunker down, it's not a bad time to catch up with your family and your reading and learning.

Stay healthy,
Kristin

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EXTRAORDINARY TEAM GROUND RULES DURING THE CORONAVIRUS PANDEMIC

I am so tired of hearing about the coronavirus and how we should all do this and that. Here's what we should NOT do:

Hold hands and sing Kumbaya together! Maybe we could be like the Italians – go ahead and sing...just don't hold hands!

Seriously though, there are new ways of working together. Even if your team has ground rules in place (explicit statements of expected behaviors), you may want to revisit them as we practice social distancing, remote working, and communicate in different ways.

If you do not have a list of ground rules and you aren't sure where to begin, start by [reviewing the "Extraordinary Team Ground Rules"](#) and maybe even create a few new ones for these unique circumstances. The Extraordinary Team Ground Rules can be applied whether you are working together in small groups or working remotely or virtually. Don't worry, they aren't all "do this and not that." Instead, they are guiding principles to lead, organize, and structure your team for greatness.

In the meantime, here are some basic **Team Ground Rules Ideas During the Coronavirus Pandemic:**

- Say hello with a wave vs. a handshake
- Wash your hands often
- Wipe down the surfaces you touch in a public area using a disinfectant wipe
- Don't hover around each other or breathe on each other

- Don't come to work with a fever, cough, or even a HINT that you have been exposed
 - If you do get exposed, tell us. Don't hide the fact
- And my favorite ground rule of all: Have fun & be joyous! Just remember: We WILL get through this....together!

HOW TO MODERATE A VIRTUAL PANEL DISCUSSION

With the rise of the coronavirus, many of us are meeting virtually (Zoom, Skype, GoToMeeting, or MS Team seem to be the most popular). The panel format is a great way for experts to share their thoughts about how to deal with this pandemic, share best practices on not only surviving but thriving through this crisis.

Unfortunately, if you don't know [the basics](#) of moderating a panel in a face-to-face (F2F) environment, then you won't do well moderating in a virtual environment. All the little things that a live audience won't see (or will forgive) get magnified online.

When moderating a virtual panel discussion pay particular attention to the following:

- **Know Your Platform.** Don't expect to just "hop on" to whatever platform your meeting organizer has scheduled.
 - Do a dry run *on that platform* – preferably with the panelists.
 - Make sure the audio and video work for all – and that they all have enough bandwidth – during the dry run AND 30 minutes before the panel starts.
 - Ensure there is adequate lighting on each panelist's face – and that the camera isn't looking up their nose (that happens more than I want to report!).
 - Show the panelists how to log on, mute themselves (especially if they have a coughing fit!), and turn the camera off (if for some reason they need to leave for a moment).
 - Look at the backdrop – what you see *behind* the moderator and panelists. Remove any distracting elements. (True story: I was moderating a panel and one gentleman had an abstract picture of a phallus behind him. Didn't even notice it until I watched the replay!)
 - Learn the platform capabilities e.g. chat box or polling features – and then figure out if you want to use them. If your audience is brand new to virtual panels/webinars, then keep it simple. Don't try to use every feature available!
- **Webinar or Meeting Format.** Decide which format you will use:
 - *Webinar Format:* Preferable for audiences greater than 30 where *only* the moderator and panelists are visible. Audience members may raise their hands to ask a question, type in a question or chat with their fellow audience members.
 - *Meeting Format:* Preferable for small audiences where the moderator, panelists, and audience members are visible to all. This is a much more intimate format where you'll need to decide whether you want the audience audio and/or video to be "on" or "off" upon entrance – and whether you want each audience member to be able to turn their audio/video controls on/off – or whether you as the moderator will control this ability.
 - *Technologist.* It's helpful to have another person manage the controls and to manage the "backchannel" (Watching the questions, chatbox, and other social streams. They are in a perfect position to alert you of an interesting question or to consolidate similar questions for you).
- **Live and/or Recorded.** Some are going to watch the panel discussion live and some may be watching it later. If so, make them feel included as well. Something as simple as looking into the camera and saying, "For those of you who are watching this at a

- later time, you can email your questions and we'll get back to you too!"
- **Have a Plant.** No, I am not talking about the green, leafy variety. Ask a colleague to log in as a participant and get the chat rolling. Have them post any soundbite or takeaway into the chatbox. It's a great way to get the conversation going among the audience!
 - **Last-Minute Check.** Before you go live, make sure y'all look beautiful: no lettuce in your teeth, your face has appropriate lighting and your background is suitable.
 - **Mingle.** Just as you would mingle with the audience, as people come into the virtual room, encourage them to enter their name and location into the chatbox. You might even want to post a quick question for them to answer. And as you see the answers scroll in, welcome them by name!
 - **Start Strong.** Online audiences get bored super, super soon, so it's crucial that you take the time to think through how you are going to welcome the audience and introduce them to the technology and the topic, *quickly* introducing the panelists and getting right into the discussion. People DO judge a book by its cover – otherwise known as the first three minutes. You want them leaning in so they stay riveted and refuse to multi-task.
 - **Shift Gears.** Audiences get bored when the conversation stays between the moderator and the panelists. You'll have to deliberately mix it up. Do something as simple as taking a moment to look at the questions/chatbox or asking for someone in the audience to raise their hand.
 - **Stimulate Conversation.** Unless your panelists are extremely comfortable with the format and each other, they will be looking to you to *control* the discussion as to who should talk and when. So you'll need to be much more cognizant of the questions you are asking and balancing the airtime. In the ideal world, you have coached your panelists to make it *as conversational* as a face to face discussion.
 - **Personalize the Q&A.** Make it personal by not only reading the question but saying the name of the person who submitted the question. "Joe in Scottsdale, AZ has a question about XYZ. [Looking into the camera], Hi Joe! Glad you're with us today! Who wants to answer the question?" or you can suggest a panelist answer the question.
 - **Extend the Conversation.** As with F2F panels, you'll want to end the panel with some final thoughts and a call to action. In a virtual panel, you may also have some unanswered questions or great ideas in the chatbox. What are you going to do with them? A great way to extend the conversation is to pledge that the panelists will respond to the unanswered questions within a few days of the panel. (Of course, you'll want to coordinate this with the meeting organizer and panelists beforehand!)
 - **Have a Backup Plan.** Murphy will rear his ugly head...so think through what could go wrong and then try to prevent it from happening in the first place! Here's my go-to back up plan for virtual panel discussions:
 - Have the cell phone number of all the panelists just in case the audio or video drops. We can always bring you in via audio (know how to do that, BTW).
 - Make sure your panelists shut down all programs running concurrently on their computers.
 - Have your panelists have a pair of headphones or earbuds at the ready in case there is audio feedback!
 - Have some interesting backup questions in your back pocket – just in case there aren't any questions that come in from the audience!
 - Have all the panelists log on 30 minutes prior to the start time of the panel to check all the equipment. Now you'll have some time to troubleshoot any

problems!
And don't forget to have fun! When you have fun, so does everyone else!

FROM THE BOOKSHELF: UPSTREAM

As a fan of continuous improvement, I was intrigued with Dan Heath's new book, [Upstream: The Quest to Solve Problems Before They Happen](#). It starts with an oft-told story of two campers who save a drowning child...only to see another struggling child drift by....and then another. One of the campers starts to walk away when the remaining camper demands to know where he is going. The answer: "I'm going upstream to tackle the guy who is throwing all these kids in the water."

In an age where leaders get rewarded for rescuing children, solving problems and putting out fires, it takes a certain confluence of events for a person to wade out of the water and go upstream. It's not something everybody does, nor is it a natural norm. In this book, Heath probes the psychological forces that push us downstream:

- **Problem Blindness.** I don't even see the problem, or it seems like an inevitable consequence and no one can do anything about it.
- **Lack of Ownership.** That's not my problem to solve.
- **Tunneling.** I can't deal with that right now.

He then poses seven questions for those who want to go upstream along with suggestions, relevant stories and examples:

1. **How will you unite the right people?** Surround the problem. Use data for learning. Heath says, "Grounding an effort in concrete data is the only way to unlock a solution to a major problem."
2. **How will you change the system?** "Upstream work is about reducing the probability that problems will happen, and for that reason, the work must culminate in systems change."
3. **Where can you find a point of leverage?** To get systems change, you have to start somewhere. So find a point of leverage by immersing yourself in the problem and look at all the factors. Chances are you can target a small population, event, data set.
4. **How will you get early warning of the problem?** Look for historical patterns to inform your predictions so you have more maneuvering room to fix it.
5. **How will you know that you're succeeding?** Watch out for "ghost victories" or those who try to game the system. "Pre-game" your measures (careful consideration of how the measures might be misused) and use paired measures (a quantity along with a quality-based measure).
6. **How will you avoid doing harm?** Look beyond the immediate win. You're in the long game. Create closed feedback loops to continuously improve.
7. **Who will pay for what does not happen?** Align incentives with all the stakeholders. Stitch together "pockets of value" that will benefit from the upstream solution to preventing the problem in the first place!

In light of the recent coronavirus outbreak, I couldn't help but think we needed more upstream people thinking about this pandemic. And all the factors that go into play have been outlined. I hope some people in government are reading this (there is my lack of ownership!).

While I may not want to go after preventing pandemics, there are other areas in my life that I can go upstream - and I have a model to work with that will make my efforts work!

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