



It's been a month now of "sheltering in place" with my husband, Joseph. Those face-to-face meetings have moved to the virtual world using technology tools we have had for years. Yet now, we are climbing that steep learning curve and fully embracing all the features and functionality. And this is not going to change. Many of my clients are quite surprised at how productive we are - and intend to continue to leverage the technology long after this crisis passes.

So we might as well get smarter on working virtually. Learn the virtual ropes in this month's articles.

Stay safe and healthy,  
Kristin

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#### **HOW TO FACILITATE A VIRTUAL MEETING: ROLES, TIPS, AND RESPONSIBILITIES**

Now that many of us are stuck at home, work must still go on. We're still meeting, just not face to face. Even though companies have been using virtual web-based tools for years, (Zoom, Skype, GoToMeeting, or MS Team seem to be the most popular), it seemed like they were using it more for webinar "broadcast" events.

Unless they had "remote workers" who were already working from home or in a different location, conference calling was the preferred method for the team to meet. (And even then, if it was just a few outlier remote workers, the traditional communications methods seemed to prevail.)

This COVID crisis has forced people through the virtual learning curve with advocates coming out on the other end. I just facilitated a two-day strategy retreat (originally scheduled for Napa Valley, but we shifted it to virtual). Even though they have had Zoom and GoToMeeting for years, they were amazed at some of the tools and techniques available to create a collaborative conversation.

After we come out of this crisis (and we will!), I will not be surprised if the pendulum swings toward using these virtual/web meeting and collaboration tools even more routinely. This IS the new world of work and remote working will become more of the norm

rather than the exception.

### **The Role of a Virtual Meeting Facilitator vs. a F2F Meeting Facilitator**

A poorly designed and run F2F (face-to-face) meeting is a waste of time, energy and resources and it's even worse in the online virtual environment! Whether the team is planning for the future, solving a problem, improving a process, resolving a conflict, or deciding a course of action, a meeting facilitator guides the team process, enabling people to understand the issues, reach agreements, and plan the next steps. A meeting facilitator is your insurance policy to make meetings deliver results using a smooth process while enhancing collaborative relationships in the least amount of time required.

Frankly, if you don't know the basics of facilitating a meeting in a F2F environment, then you won't do well in a virtual environment.

The virtual meeting facilitator is responsible for:

- Clarifying entry and engagement processes which help team members become active participants
- Creating opportunities for sociability and deeper relationships which leads to building trust between team members
- Helping to get the work done using the technology tools.
- Ensuring the virtual space is psychologically safe, contained and navigable for all

### **Here are 15 tips for facilitating a virtual meeting:**

- **Know Your Platform.** Especially when facilitating a meeting, *learn the platform capabilities* e.g. chatbox, polling features, breakout rooms, whiteboards, screen sharing, annotations – and then figure out if you want to use them. If your audience is brand new to virtual meetings, then keep it simple. Don't try to use every feature available!
  - **Do a dry run on that platform.** Make sure the audio and video work for you – and know how to help the participants log in and access the video and audio. Is there enough lighting on your face? Is the camera positioned so it's not looking up your nose? (Hint: Your eyes should be in the upper third of the screen.) Is the clutter removed from the background?
  - **Take notes.** It's useful to take meeting notes and capture on-the-spot screenshots and visuals. Is the session going to be recorded? If so, advise the participants. Will you use collaborative note-taking, applications, and polls *outside* of the meeting platform? You may have to do some initial training.
- **Have an Agenda.** An agenda is your primary prevention strategy to keep your meeting focused and on track. A company board member recently commented, "No agenda, no attenda." Think about what you do during F2F meetings. How can you simulate the experience online? When you think about it, many of the activities can be simulated online – activities to generate ideas, organize them, make solid decisions, and agree on actions to take – you just have to think about it.
- **Mingle.** Just as you would mingle with your teammates right before the meeting starts, as people come into the virtual room, start the conversation! Encourage them to use the chatbox by posting a quick question for them to answer. And as you see the answers scroll in, welcome them by name! If new to the technology, show them how to 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).
- **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 kick off the meeting. I always like to welcome the team, review the objectives and deliverable and then do a

- quick “team-building” activity. Usually, it’s just a simple question that gets everyone talking: “What was your first paid job and what lesson did you learn from it?” or “What [work product] are you most proud of?” and then model *your* brief and concise answer. If the team is used to each other, the extroverts will jump in and give their answer. On a handwritten spreadsheet, keep track of who has volunteered an answer. As you get to the end, call on those who have not answered *yet*. Right upfront, you are demonstrating that *all* are going to be involved.
- **Create Ground Rules.** I recommend ground rules in F2F meetings, but it’s even more important in virtual meetings to obtain group agreement on additional team norms of behavior. Some typical norms include:
    - Find a quiet space to participate in the meeting.
    - Enter the room a few minutes early to resolve any technical issues.
    - Do not multi-task (do other work) during the meeting.
    - Mute your microphone when not talking.
    - Keep your camera on whenever possible. Turn off your camera if doing something distracting.
    - Speak up to get attention if you have something to say.
    - Ask quieter members for their opinion.
  - **Pass the Ball.** You don’t always want to be the gatekeeper of who talks and when, so another technique is to ask the team to call on the person who wants to speak next. Again, keep track of who is contributing so that if it gets a little unbalanced, you can redirect the conversation. Or you can take a quick poll, going down the list for people to respond.
  - **Brainstorming.** I usually use a flipchart to capture the ideas for all to see and it is even more important in the virtual environment. I typically capture the strategic conversation in the chatbox or create the brainstormed list in a collaborative tool such as Google Docs. If you can’t or don’t want to multitask (facilitating and writing), then ask one of your teammates to be the recorder to capture the ideas. For more advanced teams, ask them to write their ideas down on the shared document or in the chatbox. You can even get them to move their ideas into categories or to prioritize them using a poll or annotation tool!
  - **Share Roles.** The facilitator doesn’t have to do everything: Lead the meeting, take notes, keep time, take care of the technology. Share the wealth by assigning different people to do each of these functions at different parts of the meeting. You can also add some other team roles to support team effectiveness. For example, appoint a “Yoda” to “add a bit of levity to meetings by turning to the Yoda of the day at critical points during the meeting and ask, ‘So, what’s going on here that nobody’s talking about?’”
  - **Sparingly Share the Screen.** While speakers like to screen-share their slides so all can follow the presentation, it’s better to let your teammates see each other. Only share the screen when necessary.
  - **Breakouts.** If you have more than five people in the meeting, you may want to use the breakout room function to get the conversation started. Give the team the topic title/question, the duration for the discussion, and the desired deliverable to be reported out when they return to the main room. Then send them to their breakout room (either deliberately or randomly assigned). I find you get much more online robust conversation in smaller groups and the report out can “seed” the larger group conversation.
  - **Shift Gears.** Audiences get bored when the conversation stays between two people. They have a shorter tolerance for long conversations. You’ll have to

have *something* to deliberately mix it up. Ask for idea “shout outs,” a quick [lightning round](#), change the visual, take a poll, ask a teammate a question, probe deeper, ask them to do something simple (“Look at this,” get up and stretch for 15 seconds), or take an unscheduled break. And I ALWAYS return from a formal break with a team activity. (I like to create a playlist of each team members’ favorite songs and that plays over the break. When they come back from break, they have to guess the name/band of the last song playing and who’s favorite song it was. Then the person tells us why it is their favorite song!)

- **Stimulate Conversation.** Unless your teammates are extremely comfortable with the technology 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 ask and balance the airtime. Provided you have set a collaborative tone at the start and created some ground rules for expected group behavior, you’ll have to do far less controlling of the airtime.
- **Personalize the Discussion.** Always use your teammates’ first names (or whatever name they have made visible on their profile). Thank them for their contribution. It adds a bit more intimacy to the conversation.
- **Summarize.** The virtual facilitator is in the ideal position to summarize the conversation, identify key themes, weave in key points of the conversation, and connect the dots.
- **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 meetings:
  - All should have the dial-in phone number just in case the audio or video drops.
  - Make sure your panelists shut down all programs running concurrently on their computers and/or have a dedicated line (vs. wifi).
  - Have your teammates use a pair of headphones or earbuds ready in case there is audio feedback.

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

## USE A “BREAKOUT ROOM” TO MODERATE A VIRTUAL PANEL DISCUSSION

When moderating a panel virtually, consider using the “breakout room” function – smaller group sessions that are split off from the main meeting.

You can use breakout rooms at:

- The beginning to ask for the smaller groups to identify questions for the panelists (try the [hot seat technique!](#))
- During the panel to ask the small groups to discuss a relevant point
- Before the Q&A session to identify questions for the panelists
- Right before the end to summarize key takeaways

Here’s how to set up your virtual breakout groups for success:

1. Clearly state the panel **topic**.
2. Provide any **process guidance** needed. “Each of you came to this panel wanting insights or answers to your questions. What questions do you have? Please have one person in your group write down the top three questions your group can come up with. We’ll be adding it to the ‘questions’ functionality you can find at the bottom of your screen.”
3. Identify how they are going to transmit the questions to the moderator. Here are some ideas:
  - Have each small group select a person to **take notes** in their own small group

chatbox. The recorder will then need to copy/paste that information into another location (the main room questions or chatbox) for all to see. (BTW – The info from the breakout chatbox will NOT transfer over to the main chatbox.)

- Have each small group recorder take notes in a shared Google Doc, or other document capture tool such as [Sli.do](#) or [PollEverywhere](#). Note: the other small groups will have visibility into that shared document as they input the information.
  - Have each team member directly input information into the chatbox, a shared Google Doc or another capture tool.
4. Place the team members into **breakout groups** with the time that they will return to the main room.
    - You can send them randomly to a specific number of rooms OR pre-select whom you want in each room. If you are going to pre-select, do this prior to the start of the meeting!
    - Send a **broadcast email** with a reminder of the topic and any process guidance.
    - **Pop into** the breakout rooms to check on their progress. If it looks like they will need more time, you can change the time to return.
    - One minute prior to closing the breakout room, send a 30-second **reminder**.
  5. Thank them for coming back and you can either launch into the **questions** they have submitted or ask for one small group to ask their best question, then the panelists answer. Have different small groups ask their best question, panelists answer etc..
  6. After the panel, you can decide what to do with the remaining questions. You can ignore them (no!) or use them to extend the conversation beyond the event. Use these unanswered questions to write an article or blog post, prepare a Q&A sheet, or conduct an in-depth video interview with a subject matter expert.

Using virtual breakout rooms can be simple – as long as you have thought it through. So go ahead, try this technique at your next virtual panel discussion when you want to engage the audience, shift gears, or ensure solid takeaways.

#### **FROM THE BOOKSHELF: FULLY STAFFED**

I've been looking forward to Eric Chester's new book: [Fully Staffed: The Definitive Guide to Finding and Keeping Great Employees in the Worst Labor Market Ever](#) as most of my clients were grappling with a 4% unemployment rate. But what about in the post-pandemic world when the labor market is suddenly chock-full of laid-off or furloughed workers now looking for jobs?

This book is equally as applicable. Having MORE applicants does not mean there will be a surplus of the RIGHT applicants you'll need to get your business back on track. Faced with all the many arduous tasks and details that lie between being locked down and getting back to 100% operational, you are going to need a well-trained staff of front line people who know what to do and how to do it, who love your culture, and who are loyal to your cause.

First off, you need to KEEP your great employees (Chapter 3) by:

- Perfecting your hiring funnel (assessing, interviewing and tracking candidates)
- Onboarding brilliantly (who does this well? Chester shares best practices and invites you to download this [FREE 3-chapter sample](#) featuring what onboarding should look like in your organization.)

- Create a great place to work so your talent won't want to leave!

As we go about re-hiring our workforce, this book is FABULOUS for reminding us of what we know, used to do, and inspiring us to what we CAN do to reel in "A" players.

Love this quote:

"Hiring the right people (not the best people but the right people – those ideally suited for your culture and who possess the technical skills and the talents required to handle the job, as well as the work ethic you demand), and you treat them better than another employer promises to treat them for performing in a similar role, you won't need a retention strategy because your people aren't going to leave."

For more of Eric's resources and for more about the book [visit this link](#).

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