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FACILITATING DYNAMIC VIRTUAL MEETINGS

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By Neil Cordrey and Cara Gomez

With the social disruptions caused by the Corona Virus Pandemic, organizations across the world have quickly transitioned to online meetings.

Many people who have never conducted an online meeting are now responsible for successfully using online platforms to discuss and make vitally important decisions for their organization.

If you are responsible for hosting online meetings, this quick tip guide is for you!

This guide will provide you with quick and easy facilitation tips to help:

- Minimize awkwardness
- Maximize time efficiency
- Effectively discuss agenda items

10 Quick and Effective Tips

1. **Define the goal of the meeting**
2. **Send clear agenda**
3. **Transform the powerpoint**
4. **Avoid the awkward wait**
5. **Open with a bang**
6. **Set the pace of the meeting**
7. **Overcome the silence**
8. **Ask probing questions**
9. **Keep real-time minutes**
10. **Close with action items**

Each tip comes with several implementation suggestions. Some of these ideas should be done before the meeting; others are for and after the meeting. Start by choosing one or two ideas for your next meeting. As you become comfortable in your facilitator role, add additional tips.

Before the Meeting

Define goal of meeting
Send clear agenda
Transform the powerpoint

During the Meeting

Avoid the awkward wait
Open with a bang
Set the pace of the meeting
Overcome the silence
Keep real-time minutes

End the Meeting

Close with action items

Tip 1: Define the Goal of the Meeting

Before calling a meeting, define **WHY** you are having the meeting and **WHAT** you wish to accomplish. Here are possible outcomes:

- Provide updates
- Provide a forum question
- Discuss a problem or concern to brainstorm ideas
- Identify and work through logistics of an initiative or program

Write the goal in a sentence form like this:

The main purpose of this meeting is to _____.
The objectives of our committee meeting is to _____, _____, and _____.
By the end of today's meeting, our team will have accomplished _____.

Be mindful of the time constraints of the meeting. It is realistic to accomplish one or two items that may require a lot of discussion in a one-hour meeting.

After you have clearly defined the goal and intended outcome of the meeting, you will be able to write specific, targeted agenda items.

Tip 2: Send a Clear Agenda

Before the meeting, send all of the participants a clear and concise agenda.

On top of the agenda, highlight the goal or objective of the meeting. If the meeting starts to take rabbit trails, direct participants back to the objective.

If you plan to have others lead parts of the meeting, contact them ahead of time.

Agendas for Online Meetings

-Use numbered items (don't bullet) to make it easy to reference agenda items as you move through the meeting

-If referring to an attached document, refer to it by the its file name

-Make sure agenda and all attached documents have page numbers

-Identify areas of discussion. If not using video, have each person identify themselves when talking

-Note areas of decision-making. If using a poll or survey tool, make sure everyone has a link. Do a test "poll" at the beginning of the meeting to ensure it works for everyone

Tip 3: Transform the Powerpoint

PowerPoint can be used as a tool to communicate agenda and other meeting information. To avoid forgetting information, some people will write entire paragraphs and read off their powerpoint. Avoid long slides with lots of words.

Poor Powerpoint Example

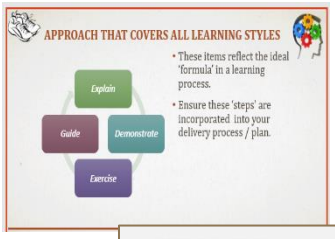
If you need the team to look at a lot of information, include it in Word, Excel, or other document files. Send the information before the meeting with the agenda so everyone has time to review it before the meeting.

You can also use the notes or comments to include additional information on a slide.

Here are some suggestions for engaging Powerpoint Slides:

- Keep words to a minimum. Try to keep lines to about six or less and no more than about six words per bullet.
- Include a graphic or picture for most of the slides
- Use a couple of colors but not too many
- Do not use a lot of animation
- Use charts to provide exercise instructions, pictures or diagrams, or key points
- Reduce the number of slides by using other facilitation methods such as an exercise, video, or screenshare

Good Powerpoint Examples



Tip 4: Avoid the Awkward Wait

The beginning of a meeting conducted via phone call-in or video conferences can be awkward as those who have logged in wait for others to join. As the meeting facilitator, you can make the participants comfortable and ease anxiety in those few moments before the meeting starts by making the meeting inviting. Provide a focus as they log in such as:

- Greet participants as they arrive
- Play upbeat music in the background
- Put quotes on the screen
- Post the objective of the meeting
- Have the agenda scroll through
- Put related trivia or other question on screen
- Use a polling feature to gain feedback on a topic related to meeting

Create curiosity by placing a mystery object on your desk or screen that get the participant's attention. Connect the objects to something related to the meeting content. When you start, explain that each object has a connection to a to For example, if you are discussing how to relieve stress on parents and children during the COVID-19 pandemic, you could have a pile of rubber bands or a stress ball on your desk. If discussing how to decrease manufacturing time, you could have a minute hour glass timer (look in board games).

Tip 5: Start with a Bang

The first five minutes of your meeting can set the tone and energy for the rest of the discussion. Providing a short activity that engages everyone helps break the tension and increase participation during the meeting.

The activity you choose depends on the number of participants. Tighter agendas or timelines require quicker activities. Activities can also vary on the tone of the meeting. A routine team meeting that is now online compared to in-person may be more relaxed, business as usual, and could use a more light-hearted start. A small business team discussing how to fund payroll during the quarantine would want to use a more sensitivity activity.

If you have ten or fewer participants who do not know each other, ask each person to introduce themselves in thirty seconds to a minute. If you have over ten participants, you will want to do a group activity.

Starting Activities

-Put on an upbeat song and ask everyone to show off their best desk dance moves

-Do a virtual "snowball" introductions. State an opening question such as "What restaurant do you miss eating at?" Then "virtually" throw a balled up piece a paper at a colleague by calling out their name. They answer quickly and call out the next colleague until all of answered.

-Play "Would you Rather" via poll for a meeting with a lot of participants

-Do a mental health check-in using different colored hearts on a polling option (green = good; yellow = pretty good, etc. Images can be found online)

Tip 6: Set the Pace of the Meeting

As the meeting facilitator, your responsibility is to:

1) Get the group to achieve the objectives of the meeting
2) Respect the time frames of the meeting

Allocate enough time on the agenda for each part of the meeting. Place the highest priority agenda items early in the session. Remove agenda items if it looks like you have more to discuss than you have time. Keep items that relate to the meeting's objectives. If you are halfway through the meeting and moving slowly, skip items with less priority and table them for a future meeting.

Prioritize Agenda

Keep the meeting from getting derailed. As participants go off-topic, refer them back to the meeting goals. Use meeting notes to keep a list of new ideas or topics that arise to discuss at a subsequent time.

Prevent Meeting From Derailing

For more leadership training resources, visit
NewRealityLeadership.com

Tip 7: Overcome the Silence

It is common to ask questions and face silence when no one wants to be the first to speak up. Online calls or videoconferencing can contribute to an environment where participants "hide" behind their screen.

Tips to overcome silence:

1. After asking a question, learn to be comfortable with up to 8 seconds of silence. It seems like a lifetime, but participants often need time to process their thoughts.
2. Use a polling or survey tool and ask an open-ended question. Allow time for all participants to answer the question. Use their answer to spark discussion or ask specific participants follow-up questions.
3. Call on a specific participant and say, "Juan, what came to mind for you with that question?"
4. Ensure the question is clear. If needed, type or write out the question on a slide or screen share. If there seems to be confusion, restate the question.
5. If brainstorming ideas, assure participants that there is no "right" or "wrong" answer.

Affirmations

AFFIRM the answers verbally, especially if the participant can't see you or your body language. **If you thank the participant for the input they will continue to engage**. If you have no response or one that indicates the person was wrong, they may hesitate in subsequent discussions.

Example of Positive Affirmations

"Thank you, Anne. Your answer is insightful in helping us see a deeper view of this issue."

"That is perfect, Dan. Dan highlighted a point that I did not think about but is very powerful."

Tip 8: Ask Probing Questions

If you are working on an initiative or project, solicit thoughts and information from the participants. Yes/No questions are not useful for generating dynamic discussions or creative conversations. Instead, try:

- What are the pros of this idea?
- What are the concerns or unintended consequences we haven't discussed?
- What information do we still need?
- Are there alternatives that we haven't considered?
- How would this idea positively or negatively affect our (fill in industry-specific stakeholder)?
- To make this initiative work, what are all of the resources needed and actions to be completed?

Rather than ask, "Does anyone have a question"? try this idea:

"We just processed a lot of information in the last half hour. Look at your notes and write down one thought that comes to mind". You can then ask for a couple of comments and have a high probability of a response.

Tip 9: Keep Real-Time Minutes and Notes

Online meetings allow you to write and share notes instantly. Ask a team member to help. Type notes directly into the agenda, or use a stylus to write on the white space.

Use a screen share with notes in the same way you would use a whiteboard or flip chart during a meeting. If several ideas are shared, draw them out with a mind map. You can list the pros, cons, questions, action items, supply lists, and more.

If doing brainstorming, open a shared document and let everyone write ideas simultaneously with a timer set. Then provide a few minutes for the participants to review the ideas and highlight their favorites. Use that list to start a discussion.

Save the minutes in a shared folder. Edit and organize those so they are clear for follow-up actions.

Tip 10: Close with Action Items

Meetings often end with "*well, that's all I have for today,"* which leaves participants unsure of the next steps. Have a purposeful and impactful ending by closing with an action plan. Use one or two from the list below:

- Revisit the meeting objective and show how it was met
- Review a list of action steps and deadlines
- Create a way to celebrate, especially if meetings include high-stress decisions.
- Share a motivational quote with the team
- Finish with a celebratory dance to an upbeat song

Revisiting the Meeting Objective Example:
"Our objective today was to evaluate funding opportunities for small businesses in our community and we have identified three initiatives that we plan to work on."

Action Step Example:
"*Carlos will do Action A by Tuesday; Khadijah will do Action B by the end of the week; Samuel will complete Action C and email team by March 1st).*

ABOUT New Reality Leadership

New Reality Leadership consists of a suite of leadership development resources that can be customized and scaled for varying-sized companies and business needs.

The resources, which can be modified for facilitator preference and are easy to use, include facilitator guides, PowerPoints for in-person session, self-study guides, and participant workbooks. Discussion guides and other resources are available for Senior Leaders.

New Reality also offers assessment tools or can custom-create assessments to evaluate business metrics specific to a company or individual department. Coaching support is available for leaders at all levels and includes virtual coaching, on-site coaching, train-the-trainer, and instructional design support.

Visit us at NewRealityLeadership.com

What Makes New Reality DIFFERENT

New Reality Leadership focuses on two aspects of leadership development rarely emphasized by many companies: linking the leadership training to business metrics and providing interactive, ongoing skill development coaching.

- **Linking leadership training to business performance**

  New Reality Leadership coaches businesses to not look at leadership development as an item to be crossed off a checklist for employees. Rather, the company should be able to identify how the skills and behaviors the employees and leaders learn influence business performance. This is done by determining business metrics specific to the company or department. Employees and leaders are shown how their skills and actions influence the overall mission, vision, and production of the unit. One company that has used New Reality Leadership's training and principals demonstrated a 47% increase in production in two years.

- **Ongoing skill development and assessing improvement**

  New Reality Leadership does not view their training as “one-time” retreats or sessions. The training design allows leaders to learn over time in a variety of ways and as part of their work vs. separate activities. The focus is on business improvement, and each module helps leaders connect what they can apply to improve their area.