

VIRTUAL FACILITATION



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- Increasingly more meetings are being conducted virtually (web meeting, teleconference, video web meeting, etc.) and they require some specialized facilitation techniques.
- See sample discussion guide for a virtual web meeting or teleconference. Link on NRM Gateway for [“How to Do A Webinar.”](#)



SIMILAR TO IN-PERSON FACILITATION

- Work with the group to set the agenda
- Help group to observe agreements and stay on track
- Create space for those who are quiet
- Summarize comments or concerns
- Suggest group process techniques
- Acknowledge
- Reframe negative language
- Summarize consensus, get confirmation from the group



CONFERENCE CALL TIPS: BEFORE THE CALL

- Prepare and distribute agenda and objectives (ask for input)
- Distribute call-in info WITHOUT host codes
- Distribute all materials, including any presentations (as a backup). And/or put ALL needed information (call-in numbers, web access, documents) in a calendar request with an advance reminder (as opposed to somewhere in the email pile or on a separate site)
- If using an Outlook meeting invite, include call-in codes in the “location” and include the meeting time in the body of the message
- If relevant: Obtain pre-meeting input/ideas which you summarize during the online session.



CONFERENCE CALL TIPS: DURING THE CALL

Begin:

- Roll call/introductions (write down all names for the record and to call on people)
- Review agenda and ask if any other items to cover
- Review ground rules:
 - Mute phone when not speaking
 - Don't use hold function (hold music will disrupt)
 - "Beep-in" or raise your virtual hand if you have a comment/question
 - Identify yourself every time you speak
 - Avoid multi-tasking
 - Let the group know if you have to leave early
- Review objectives and where the group is at in accomplishing its work



CONFERENCE CALL TIPS: DURING THE CALL

Discussion:

- Tee-up discussions with a presentation, handout or graphic; make sure everyone is on the same page
- Keep people engaged
 - Call on people. If too many, call on a category of participants to speak, i.e. agency, or Division, or state
 - Do a round robin
 - Designate places on the agenda for feedback – voting or polling
 - Use “does anyone disagree” instead of “is this the right approach”
- Silence is ok – give people time to think



CONFERENCE CALL TIPS: DURING THE CALL

Tips if you get off track:

- Reference objectives and agenda and suggest these options:
 - “Park” the topic that you are discussing
 - Agree to skip another agenda topic
 - Schedule a meeting to discuss the topic specifically



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CONFERENCE CALL TIPS: DURING THE CALL

Conclude:

- Summarize due-outs and decisions and make sure everyone agrees & confirms
- Agree on next call time at the end or set up a reoccurring call if appropriate
- End the call on-time even if you don't get to all agenda items (personal preference)



BUILDING STRONG®

KNOW YOUR TECHNOLOGY

AT&T Reservationless Webinar & Teleconference

- Recommended if you schedule at least one audio and/or web conference every 6 months
- Less expensive with more options
- Maximum flexibility to hold a meeting, day or night, without having to make a reservation.
- Host is assigned permanent dedicated dial-in numbers & access codes to use 24x7



KNOW YOUR TECHNOLOGY

- **Roll Call *9:** Plays the participant count followed by the list of recorded names. Host or participant may request at any time.
- **Participant Count *5:** Any participant can check the number of participants in conference at any time. Tally is announced privately to requesting participant.
- **Entry/Exit Options *3:** Choose tones, message with participant's recorded name, or silent entry.



WEBINAR-SPECIFIC TIPS

- Reserve webinar line earlier than "advertised" time. Get online At Least 15 minutes in advance to set up presentations and coordinate with other meeting hosts
- Be mindful of file size! 20 MB can crash system or take 5-10 minutes to load. 5 MB file will load on webinar site in 10 seconds. Tell presenters to shrink their files (especially maps)!
- Tell everyone in email to log into both phone and website, using their FULL name and office abbreviation.
- Make sure you don't request video/telecom when placing the ACE-IT request. If a webcam window pops up minimize it rather than trying to close it.
- Encourage people to TYPE (CHAT) questions DURING presentations to encourage questions afterward.



VIRTUAL TEAMING BEST PRACTICES

Setting up your team to be most effective:

- Establish a repository for all info and work (sharepoint, wiki, google docs, drop box (but ask Counsel/ACE-IT)).
- Create a team member list with photos and info about each person (team building).
- Don't do it by yourself – assign roles of note taker, meeting scheduler.
- Ensure your members have the motivation, time, commitment, funding/approval to participate (may require 1-1 phone conversations).
- Ensure members are comfortable with the technology. Create time to play/become familiar.



VIRTUAL TEAMING BEST PRACTICES

Sustaining your team:

- Assign tasks in a realistic time frame – who will do what by when.
- Set up a reoccurring meeting so people know what to expect and clear their calendars.
- Acknowledge and celebrate success; Summarize accomplishments at beginning of each call.
- Demonstrate & reiterate relevance & impact.
- Evaluate the team - Check in with participants periodically & request feedback.



RESOURCES

- **Facing Down Your Fears About Facilitating a Virtual Meeting**

- <http://www.facilitate.com/support/facilitator-toolkit/docs/Facing-Fears-Virtual-Meetings.pdf>

- **Six Critical Success Factors for Running a Successful Virtual Meeting**

- <http://www.facilitate.com/support/facilitator-toolkit/docs/Six-Critical-Success-Factors-for-Successful-Virtual-Meetings.pdf>

- **AT&T Reservationless Service User Guide**

- <https://aceit.usace.army.mil/support/Communications/Documents/ATT%20Audio%20and%20Web%20Meeting/Reservationless%20Conferencing%20User%20Guide.pdf>

