

# Taking Virtual Meetings to the Next Level: 7 Tips for Facilitation

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Are you deciding whether to hold a virtual retreat/meeting or to postpone until it can be in person? Virtual retreats can be very effective, preparing your organization for quicker action when the pandemic clears.

Remote meetings will continue well into 2021, and maybe beyond as work models and meeting expectations shift. How can you effectively engage meeting/retreat participants with virtual tools like Zoom, Teams or Webex?

Veralon has facilitated virtual Board retreats and other planning sessions throughout the pandemic, and we have found that with preparation, virtual sessions can be nearly as effective as in-person sessions.

The seven tips below include thoughtful preparation and effective implementation to enhance focus and avoid disruption, resulting in a more engaged audience and overall meeting effectiveness.



## **PREPARATION:**

- 1. Keep directions simple:** In any facilitated meeting exercise (and particularly for breakout groups), simple directions were always important – but the value of simplicity is magnified in a remote environment. In an in-person session, a facilitator may have given a table 3-4 questions to consider before bringing the entire group back together to discuss findings. In a remote environment, to keep session attendees engaged, no more than 1-2 questions should be posed to groups at a time. It is effective to ask one question, have the breakout groups discuss briefly, then come back to the larger group. This can effectively be done multiple times, as clicking a button will disperse and gather the groups more efficiently than in-person sessions in which chairs must be rearranged.

2. **Enhance polling effectiveness:** Polling can be used effectively to gather information as well as enhance group participation when done with appropriate planning. Some platforms (e.g., Zoom) include a polling function, for other platforms, a third-party polling platform must be used (e.g., Mentimeter). It is always preferable to prepopulate desired questions in the meeting (as well as for the extra staff member to keep a Word copy of the questions readily available for any issues that arise). The same staff person should also have additional questions on hand to account for extra time (as applicable). Further, as discussion happens throughout the session and new questions arise, this staff person can be populating those additional new questions at the appropriate place in the presentation. Alternatively, in the event you have a smaller group and/or don't have access to an additional resource to assist with polling, taking an "informal" poll via the chat function, will quickly allow participants to give feedback while the presenter continues the discussion.
3. **Do a dry run:** Many virtual platforms have a variety of setting options. These settings often need to be activated or selected prior to the meeting start time. Ensuring that a knowledgeable individual checks each meeting to confirm the desired capabilities are enabled/disabled saves precious meeting time. Do a dry run for important meetings.
4. **Offer technical help:** Participants have made great advances this year in their familiarity with virtual meeting platforms. But don't count on everyone, especially board members, being up to speed. An administrative assistant can help people test in advance of the meeting to minimize "day of" problems. Further, someone should be available for participants to call/email if issues arise.

## DAY-OF IMPLEMENTATION

5. **Uniform participation via individual computer:** It may be tempting to bring some people together in a conference room while others attend via remote connection. This mixed model is suboptimal. Ensure all participants are on a separate computer in their own location with a working camera. Participants should use their computer audio (rather than dialing in separately from video) if possible, that way their video will maximize/rise to the top when they speak. This allows faces, body language, and reactions to be seen by all participants. It also encourages active listening by all parties. Participants should also be individually welcomed when they arrive to the meeting. This allows the host to ensure audio/video and the mute functions are working for each participant. Finally, (and as a last resort) a backup phone number should also be available if a participant is experiencing a computer issue.

6. **Have extra hands:** In addition to the facilitator(s) of the session (of which there should be no more than two), an additional staff person should attend the session. This individual's role will include taking effective notes of discussion and meeting outcomes, as well as controlling polling functions and breakout group capabilities. This will allow the facilitator to keep the discussion moving rather than needing to pause to revise questions or breakout group composition.
7. **Use shorter segments:** In a normal retreat session, there may be an hour (or more) of 'presentation' style reporting or education; try to avoid this format in a Zoom setting. Break up presentation material considerably to include group or small group discussion, polling, or other engagement to keep the attention and focus of participants.

Until we are all able to safely gather together, continuously improving on and effectively utilizing technology will be imperative to keep our organizations engaged and focused on the future. ●