Facing Down Your Fears About Facilitating a Virtual Meeting

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Even if you've had years of experience leading groups, you're bound to feel a little anxious when you are asked to facilitate a virtual meeting, especially one that replaces a traditional face-to-face one. The two best ways to alleviate your fears are first, detailed planning, and second, practice. Here are some of our clients' worst fears and suggestions of ways to handle them.

How do I know if a virtual meeting is appropriate or not?

It may be easier to indicate conditions where remote meetings may not be the best solution--- including any combination of these factors, for starters: when new teams are coming together for first time and must collaborate successfully under pressure; trust is absent or negative; issues are complex; outcomes will have a significant impact on people and/or organization; people come from different time zones and must participate at same time with all others for extended periods of time; people don't have same access to technology.

How do I get myself ready for a remote meeting (I am the facilitator!)

1. Send out workshop/meeting overview document that clearly spells out objectives, assumptions, roles, agenda, participants, technology (and when to use it), required pre-work, ground rules, etc. That is, make sure everyone is on the same page and on board from the very first minute.

2. Map out your agenda minute by minute, including how you will use technology for each activity.

3. Make sure you have a note-taker and a time-keeper (but shouldn't be you)

What do I do if I'm asked to achieve the impossible in a virtual meeting? What are my options, short of walking away from the assignment?

Consider any or the following:

1. Reduce the number of participants.

2. Reduce the scope for the actual meeting and find other ways to accomplish the remaining objectives, for example through one on one calls or meetings, or by giving people homework assignments.

3. If your meeting sponsor still insists on having you achieve something you consider impossible, walk him or her through a detailed agenda so that it becomes more real to him/her how much time each required conversation is likely to take.

4. If the sponsor insists certain outcomes are urgent and critical, propose alternative ways to achieve the same results, including the possibility of a face-to-face meeting among all or some participants, or multiple remote meetings over a compressed period of time

How do I maintain focus on our meeting objectives?

1. "Name" digressions when they begin and determine how best to handle them. For example: Validate with the group that this discussion is off-topic and suggest how it might be best handled.

2. Keep a "parking lot" to be handled offline and agree who handles it and how. Ask whether an additional meeting might be needed, and who needs to be involved.

3. Refer back to agreed-to objectives or agenda as needed to ensure that group remains focused.

4. Paraphrase and summarize key points frequently, tying them back to objectives.

5. Make sure you have a method to signal the sponsor (or other decision-maker) to enquire whether the digression is fruitful, if you feel you don't have authority to decide on the spot.

How do I check the 'temperature' of the participants?

How do I know if I have 'full' participation? People participate to different levels and in different ways - that's why we invite a diverse group. How do I know if everyone is participating as much as they can/want to/most usefully can?

1. Take a quick vote (may be scale of 1 -5) -- such as I am feel totally disengaged (1) to I am feeling enthusiastic and energetic (5).

2. Ask! Go around the "room" and ask for a one-word adjective that describes how they're feeling about the process, meeting, ideas, dialogue, decisions, etc. at this moment. This could be a verbal response or by entering into meeting software.

3. Listen carefully for a drop in energy, noticeable delays in replies, half-hearted responses, silence when conversation is called for. State what you're observing/hearing/not hearing. Validate your interpretation (whatever it may be) and if determine people have become disengaged; ask group how rest of time could be used most productively. Or make a suggestion to your session sponsor privately and gain agreement and then let the group know how agenda will change.

How can I be sure everyone is 'on the same page' and understands my instructions?

Quality input requires good questions and clear instructions. I can't see the quizzical looks on people's faces any more. Some people may not want to admit they are lost.

1. Send an overview document in advance with stated assumptions and specific exclusions, especially if you believe some people may have different expectations. Restate key points at the start of the session. Ask for questions before you move on.
2. Send specific instructions in advance and ask that people print them and have them handy at meeting start time. Also post instructions on screen. If you have non-native English speakers, prepare to state instructions more slowly than usual, especially if they are complex or difficult.

What are techniques for control and direction of agenda?

Can I plan for the unexpected? What can I do midstream if we seem to be getting off course? How can I tell when we need to detour and when we need to stick with the agenda?

1. If you feel you are going off track, refer back to the objectives and/or agenda and let participants know that they/you have a few options, which include: "parking" the item that has taken you off track for handling later; skipping another agenda item; planning a follow-on meeting with some or all participants; etc. Extending meeting time on the fly is usually not an option for remote meetings!
2. Ask your session sponsor for an indication how s/he would like to handle digression, or suggest one yourself to the group. Seek validation from sponsor and/or group.
3. When the unexpected happens in a session, take the following steps:
   o Request the group's permission to detour from the agenda.
   o Facilitate a round-robin in which each participant is invited to answer the question, "Given what just happened, tell us what you are experiencing right this minute?"
   o Facilitate a second round-robin in which each participant is invited to answer the question, "What needs to happen to allow us to proceed?"
   o Take a break and meet briefly with the meeting sponsor to ensure that the actions for proceeding are in line with the sponsor's goals.

How can we keep everyone engaged during a virtual meeting?

They don't get the same warm fuzzies as when they are face to face.

1. Use the time for discussions –avoid presentations which can be shared prior to the meeting.
2. Keep conversations concise and quick.
3. Ask provocative questions, using different techniques.
4. Keep participants on their toes with the element of surprise.
5. Maintain your own energy, vary voice tone.
6. Take temperature of the group and adjust accordingly. For example, if participation is lukewarm, be prepared to modify the agenda, ask different questions, or otherwise modify to re-engage participants.

7. Think of every part that might be tedious and remove it. Find another way for these items.

8. Refer to people by name.

9. Have small meeting pods - people in same room joining in together rather than from their own desks.

10. Use humor to shift the energy in a positive direction.

How do we discourage people from multi-tasking and turning to their emails?

1. Include this ground rule in the workshop overview document. For example, "full participation of all members is required; please adjust your schedule to accommodate". Reiterate the ground rule at the beginning of meeting.

2. Let people know that you can ensure the group will meet their objectives in the allocated time only if everyone can commit to full participation. Ask for verbal agreement by each if needed.

3. Use interactive meeting software like FacilitatePro to help focus everyone's attention on same thing.

4. Ask that all stay OFF mute. Everyone will be more likely to hear key clicks, and people can jump into the conversation without delay.

How can I get participants to feel comfortable and participate?

1. Allow time for personal introductions if this is a new group or if a new member joins. This may be verbal or in writing. Encourage posting of photos on team portal or other shared location.

2. Find ways to ask questions or otherwise engage people in a way that allows everyone to participate, if appropriate. Don't be afraid to use humor, but know that people can't see the arch of an eyebrow or sparkle in the eyes to indicate a joke, so think about how your turn of phrase will be interpreted.

3. Call in advance or afterwards to check in, especially if they are important contributors, or someone who has not been willing or able to participate. Let them know how much their contributions will make a difference, and ask what you can do to encourage more contributions in the future.

What do I do when the technology doesn't work?

How can I prepare for this? Do I stop the meeting or struggle through?

1. Have a back-up plan. Know what you will do in advance.

2. In the overview document/email that you send out ahead of time, ask that people test browsers, try functions, etc. prior to the meeting. Also, open up the online meeting room at least 10 min prior for those who have not tried it and let them know that when

the official meeting starts they will be expected to be fully functional and ready to go. State this expectation clearly in the overview document and email messages.

3. Have a separate phone line where someone can reach you if they have technical problems, allowing for the group to continue working without listening to you troubleshooting.

4. Plan ahead for technical support - have someone else on call to help out, especially if you have a large group or have encountered technical difficulties before.

5. Be prepared to reschedule the meeting. If, for example, the teleconference service crashes it is hard to continue with verbal discussion. In this case you could send out an email informing participants of the new meeting time and possibly use interactive meeting software like FacilitatePro to gather some asynchronous input in the meantime.

Read more Contact MoreInfo@Facilitate.com to request a free copy of "75 Tips for Getting Great Results from Virtual Meetings".

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