INSPIRATION ON PROCESS METHODS IN VIRTUAL FACILITATION

Implement Consulting Group

2020

IMPLEMENT
CONSULTING GROUP_

EXERCISE INSTRUCTIONS: WHAT ALWAYS GETS TANGLED UP AND MISUNDERSTOOD

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Exact instructions

It is important to make precise exercise instructions in order to avoid misunderstandings and confusion among the participants. Precise instructions increase the motivation to engage in exercises and ensure accuracy and learning.

Basic rules

As a basic rule, the exercise instructions must always answer these questions:

What, why, who, how, for how long and where?

Always write your instructions in the PowerPoint presentation to avoid confusion or uncertainty about the exercise.

As the very first thing, always tell the participants “what” and “why”. It is important that you clearly communicate the purpose of the exercise.

Keep track of time. Let the participants know when there is one or two minutes left.

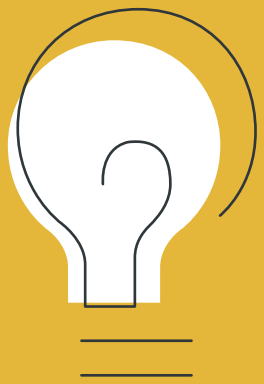
Avoid

A phrase such as: “So if you could just ...” can leave the impression of the exercise being something that is to be overcome and puts you, as a facilitator, in a weak position. Instead, use a phrase such as: “What we are going to do now is ...”.

OPENERS

- Exercises of 10-30 minutes that aim to set the stage and create an overview of expectations for what is to come. The playing field will be explored and potentials recognised.

- Often, the conversation will be about good experiences, skills and wishes for improvements.



SOCIALISING BEFORE THE MEETING

Opener

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Preparation

Appoint a participant that enters the meeting 10 minutes before the meeting begins. This person will start the conversation, small talk and ask questions, so the participants get to know each other, catch up or update each other on work-related subjects or private life.

Questions to start the conversation

- *What is going on in your other projects?*
- *What is happening in your country?*
- *How are you feeling today?*
- *What time is it where you are calling in from?*

Visual setup

- Video on
- A nice welcome slide with the title of the meeting and the formal start time

Tip: If you are many people joining, consider using breakout rooms for smaller group conversations.

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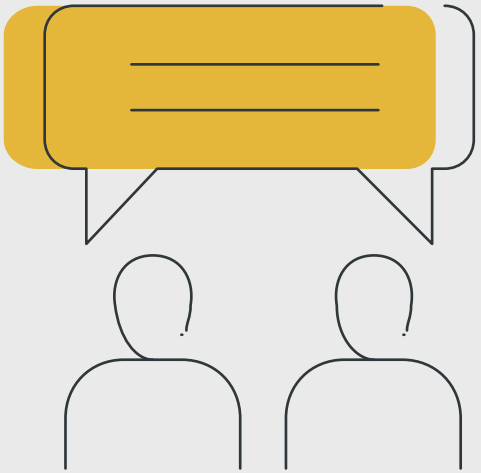
HOW TO DO IT VIRTUALLY



WHERE ARE WE?

Opener

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Purpose

See which cultural backgrounds/locations are represented in the meeting.

Preparation

Facilitator: Create a shared whiteboard. Get inspiration from this template: Where Are We? template

Visual setup

An image of the world (or relevant region).

HOW TO DO IT VIRTUALLY

Steps

1. Introduce the purpose and the process.
2. Ask people to write their name on a sticky note and place it on the world map indicating where they are located.
3. Take turns sharing how long you have lived there, and what you like about the city/country.
4. Talk about time zones and how these impact the way you work remotely with your colleagues and clients.

Alternative: Ask people to point out where they would like to travel to and why.

EXPECTATIONS

Opener

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Purpose

The participants put into words what expectations they have and sort them into two categories.

Questions

- *What do you hope to get out of the session?*
- *What do you hope to do differently after this session?*
- *What would make this session valuable to you?*

Note: Make categories that the participants can sort their expectations into. This could be:

- Process vs content
- Creating new ideas vs expanding what we have

HOW TO DO IT VIRTUALLY

Preparation

Create a whiteboard with the two categories in opposite sides.

Steps

1. Introduce the purpose and the process.
2. Share the whiteboard with the participants.
   Ask them to write their expectations in a text field on the whiteboard.
3. Ask the participants to place the expectations between the two categories and closest to what is most important for them.
4. If needed, do a follow-up on the statements that are not clear. Otherwise, move on.
5. Consider visiting the expectations at the end of the session.

I'M LOOKING FORWARD TO....

Opener

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Purpose

To get an indication of what the participants are looking forward to during the session, start with good energy and everyone being active.

Preparation

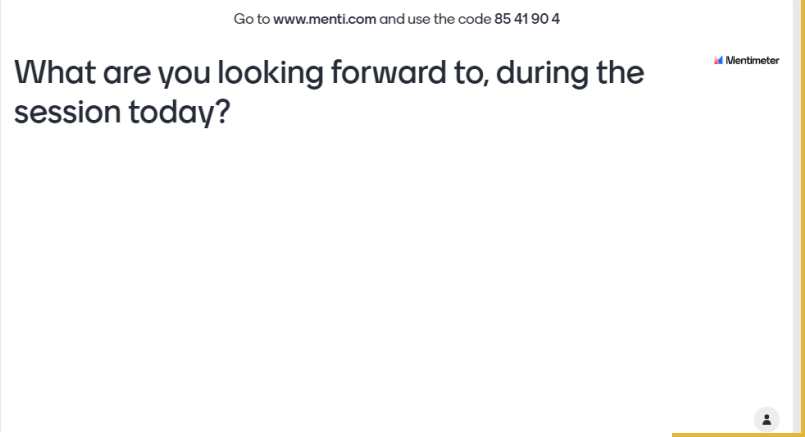
- Log in and register https://www.mentimeter.com
- Set up a new presentation.
- Add an open-ended questions such as "What are you looking forward to, during the session today?"

Alternative: You can change the question, add more questions or select another format such as scales where you can ask people how ready they feel for a change ahead, how energized they are or something completely different. Always remember to look at your purpose and do an opener, that links to this.

HOW TO DO IT VIRTUALLY

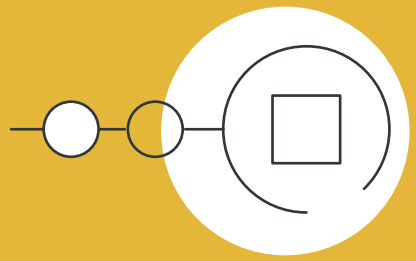
Steps

1. Introduce the purpose and the process.
2. Tell the participants that we will do a warm-up exercise.
3. Share the link and the code on the screen and ask people to access it on their phone or computer.
4. Pose the questions and ask people to answer.
5. Share your screen with the results.
6. Comment on the inputs.



CLOSERS

Exercises of 15-30 minutes that aim to close the intervention. It usually contains conclusions, learning points and/or results and for a realistic assessment of how the participants can move forward from here (next steps).



USE A QUIZ TO TEST KNOWLEDGE

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Purpose

To let participants test their knowledge in a competitive but social gamification mode.

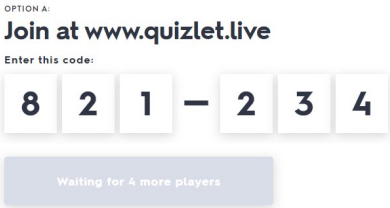
Preparation

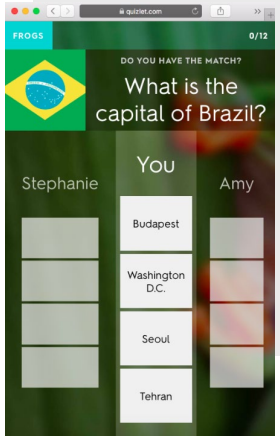
Create 6-12 questions based on your subject that you expect the participants to be familiar with.

1. Set questions up in kahoot, menti or Quizlet.com
2. Activate “Play Live” and share the code with the learners.

Illustrations

Readiness	provides a structural framework and the "emotional and psychological opening" for the new learning
Pre-exposure	is introducing ideas, before the formal learning
Prior knowledge	means both eliciting from learners what they already know and building initial knowledge that they need in order to access upcoming content.





HOW TO DO IT VIRTUALLY

Steps

1. Share your screen from the quiz platform
2. Introduce the participants to the platform. Ask them to use their mobile devices and log in with the code.
3. Tell them that it is about answering x number of questions correctly in a row!
4. Celebrate the winner and ask about their learnings or any questions they need you to answer.

REARVIEW MIRROR

Closer

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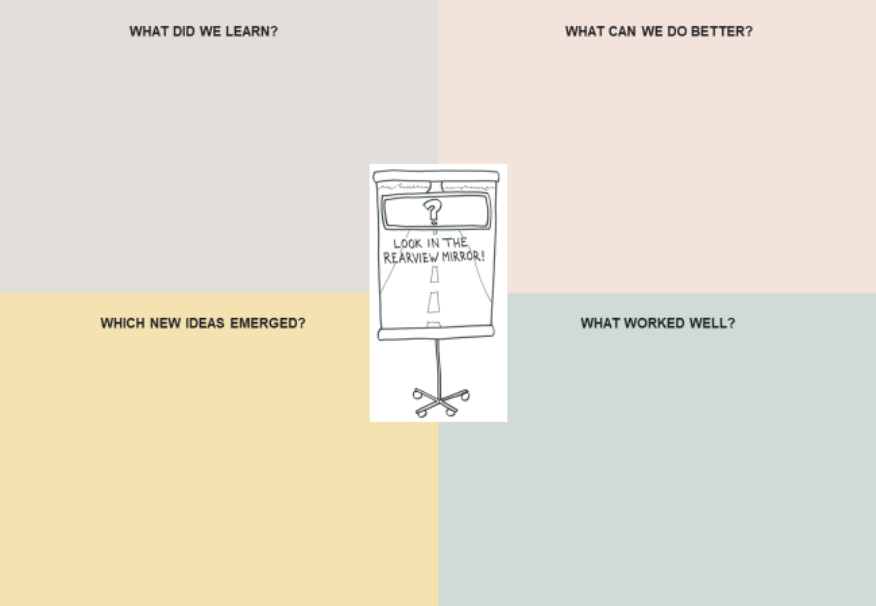
Purpose

To recap learnings from prior sessions, to get participants' feedback on the theme and to start contributing.

Can also be used as an opener.

Preparation

A digital whiteboard with a drawing of a rearview mirror with a question mark inside and the headline: "Look in the rearview mirror!"



HOW TO DO IT VIRTUALLY

Steps

1. Introduce the purpose and the process.
   - If it is a larger group, divide the participants into breakout sessions. For small groups, keep them in one session.
   - The participants discuss and document:
     - What did we learn?
     - What new ideas did we get?
     - What can we do better?
     - What worked well?
   - The participants share their answers in the chat or on the whiteboard.

Alternative: The questions can be answered in a silent brainstorm. Afterwards, the participants move to breakout room and discuss their answers.

KEEP, STOP, START

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Purpose

The purpose of the “keep, stop, start” exercise is to evaluate a change and develop next steps.

Can also be used as a breakout exercise during the meeting.

Preparation

Create a shared whiteboard and create space for participants to write under each element.

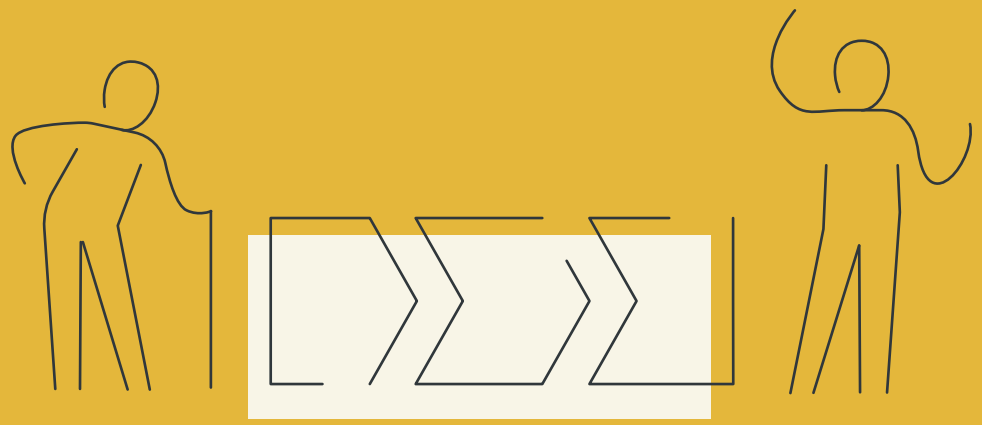
HOW TO DO IT VIRTUALLY

Steps

- Introduce the purpose and the process in plenary.
- The participants answer (silently) the following questions on the whiteboard:
  - What is working that we should KEEP doing?
  - What is not working that we should STOP doing?
  - What do we need to START doing?
- The participants’ answers are shared in the chat.
- A facilitated dialogue should output the most important KEEP, STOP and START things that we can all agree on.

VIRTUAL PROCESSES

Exercises of approximately 15-60 minutes that aim to open up a subject or move towards a decision. This is usually the “core” of the session.



THE INFORMATION MEETING

Purpose

To pass on a message in an engaging and inspiring way.

Preparation

Define your key message and select the way you want to pass it on. Consider whether to use the usual PowerPoint or whether other approaches would be more effective. The following list provides inspiration for alternative ways of presenting:

1. You present using posters.
2. You present using coloured cards.
3. You present in front of a green screen with content.
4. You present using video.
5. You present from a new location.
6. You interview someone – it could be a key stakeholder.

Make sure the way you present matches the message you are passing on.

Process

Present using one or more of the suggested approaches. You might consider asking for questions in the chat or using a tool such as menti.com.

HOW TO DO IT VIRTUALLY

Steps

1. Introduce the purpose and the process in a plenary session.
2. Select the format you are going to use for the presentation.
3. Prepare the material and make sure people can read it on screen if your are using coloured cards or posters.
4. Guide people to the right virtual setup – split screen or only one.
5. Give your presentation.
6. Ask for input, if relevant, and reply to all or select a few.

THE Q&A SESSION

Purpose

To have the participants reflect together on a piece of information, a keynote from an expert, an idea or a decision.

Preparation

Define your key message and select the way you want to pass it on.

Decide on the themes/questions for your Q&A session.

Visual setup

Use video of the presenter/expert and the questions posted in the chat or on another platform.

HOW TO DO IT VIRTUALLY

Steps

1. Introduce the purpose and the process in a plenary session.
2. Make the presentation in the plenary session. Remember to tell the participants that they ask questions afterwards, so they should take notes along the way.
3. Send the participants into breakout rooms to reflect on your presentation and to come up with a question or two.
4. Bring the participants back into the plenary session and collect their questions using the chat, menti.com or a similar feature. It can be an advantage to have a moderator looking at the questions and passing them on.
5. Answer some/all questions.

Alternative

If you are short on time or do not want to use breakout rooms, you can just ask participants to pose questions right away without a group reflection.

SILENT BRAINSTORM

Purpose

Silent brainstorm is an exercise in which participants come up with challenges and opportunities, ideas and solutions as well as thoughts and reflections on a subject. By doing it silently, everyone will have a saying, and you will avoid that the first and loudest voice will affect the other participant's opinions.

Can also be used as a breakout exercise.

Preparation

- Prepare the subject for discussion as a question.
- State the rules clearly.

Visual setup

Make sure to write the input down somewhere for everybody to see. If possible, also have people on video.

Steps

1. The rules are revealed.
2. The question is revealed.
3. Participants write their answers silently for five minutes on a piece of paper.
4. The answers are revealed/shared in the plenary session and discussed.
5. Consider adding a second round of this to get one step deeper.

HOW TO DO IT VIRTUALLY

Steps

1. Introduce the purpose and the process in a plenary session.
2. Post the rules in the chat or on a slide. One rule is how much time the participants have to write their answer.
3. Introduce the problem you are trying to solve or the idea your are qualifying.
4. Give time for silent brainstorm (5 min). Tell them to post their answer when time is up.
5. Present input in the chat or in a shared document and discuss the points one by one in the plenary session.
6. Do a second round of silent brainstorm based on the new input (5 min).
7. Share and discuss new ideas in the plenary session.
8. Consider whether you need a method for selecting the best ideas (sort, vote etc.).

ON THE FRONT PAGE OF NEWSWEEK

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Purpose

To envision the future and start writing the story of where to go in order for us to start taking the right steps in this direction.

Preparation

Create a layout for a newspaper that you can fill out.

Visual setup

PowerPoint in Zoom or link to shared slide.

HOW TO DO IT VIRTUALLY

Steps

1. Introduce the purpose and the process in a plenary session.
2. Show the frontpage as a PowerPoint slide.
3. Instruct participants to go into groups and discuss the vision of the company/project/team: why are we on the front page in 20XX? What stories can we tell about our company, project, team ...?
4. Meet up in the plenary session and fill out the template using the annotate function (in Zoom) or create it as a shared document in PowerPoint.

CO-CREATING A SOLUTION

Purpose

To create a solution together in a group in which everyone has a chance to contribute to the solution. It could be co-creation of the design of a meeting or a workshop working on the design star.

Preparation

Design the process, break it down into steps and create a template using a whiteboard tool (such as Miro). Work on the design star and an illustration of the design star with boxes for each element:

1. The purpose and success criteria of the meeting or workshop
2. The participants
3. The platform
4. The process
5. The roles played

Write instructions in Miro for each step to guide your participants through.

Visual setup

Miro.

Tips

Create slides for templates in PowerPoint, save them as pictures and upload them in Miro for a nice design.

HOW TO DO IT VIRTUALLY

Steps

1. Introduce the purpose and the process in a plenary session.
2. Guide participants to Miro.
3. If they are new to Miro, give them a guided tour.
4. Go to the template you are going to fill out and give people time to work.
5. After each step in the process, do a common check in/discussion on the input to consolidate.
6. Provide instructions for the next step.
7. Consolidate in the plenary session.
8. Sum up by explaining how you will use the input going forward.

POINT VOTE

Purpose

Fast and efficient way to determine which point on a list is the most important.

Preparation

Prepare a list of items. Use a listing or brainstorm technique.

Look at the list of items. Combine two or more similar points. If necessary, change the order of the points.

Visual setup

Annotate function or shared slides.

Variation

The above-mentioned method allows the group to select the best point/solution/underlying cause etc. Maybe you also want to consider other factors such as: what is the easiest to implement, what is the cheapest, what can be implemented without external help? Give participants an additional amount of dots (in a different colour) and let them vote on this second factor. Finally, you can select points that are not on the list by comparing votes for the best solution with votes from the alternative list.

HOW TO DO IT VIRTUALLY

Steps

1. Introduce the purpose and the process in a plenary session.
2. Let the participants select their favourites, equivalent to 1/3 of the total number of points. Mark by using the annotate function or names in a shared slide.
3. Count the votes. Delete the points that got the fewest votes (and remove annotations). Repeat steps with the remaining items on the list. Continue until the list is narrowed down to the desired number of points.
4. Show the final list and ask if anybody is missing something that they feel is really important.

SORTING IDEAS

Purpose

To sort a lot of ideas and to rate them according to two criteria.

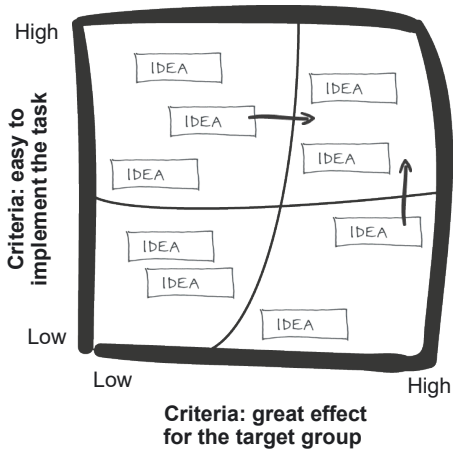
Preparation

Decide on the criteria to sort the ideas by:

- Easy to implement the task
- Great effect for the target group
- Importance to customers
- Satisfaction

Slide with the illustration and criteria

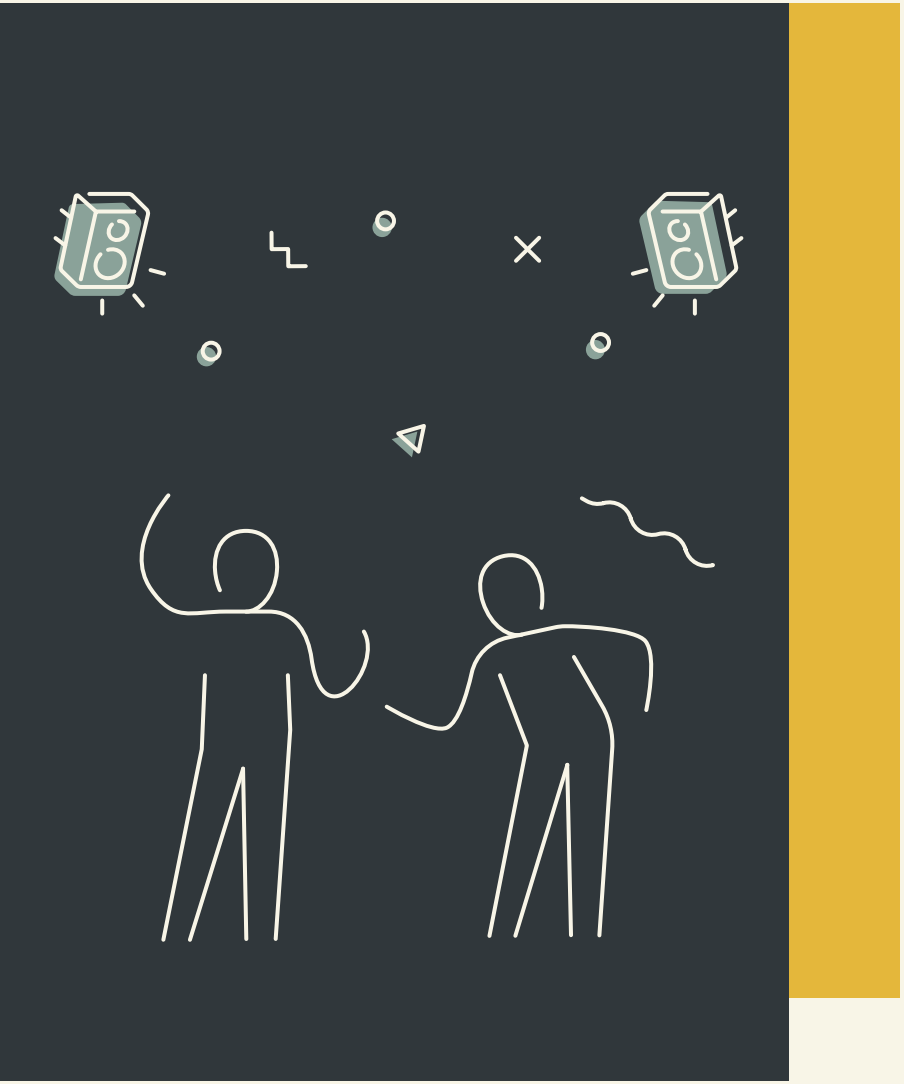
- Design the Miro template
- List of ideas



HOW TO DO IT VIRTUALLY

Steps

1. Introduce the purpose and the process in a plenary session.
2. Guide participants to Miro or a similar whiteboard with the opportunity to collaborate using Post-its virtually.
3. Present the sorting criteria. Remember to agree on what you mean by criteria (e.g. what is a great effect for the target group?). It pays off to be very specific when defining the criteria, so they are not up for discussion.
4. Place the ideas according to the two axes.
5. Some ideas can be qualified and developed, and they can thus move up into the right upper corner.
6. Decide how you will take this forward.



WANT SUPPORT FOR THE NEXT STEP OF YOUR VIRTUAL JOURNEY?

Reach out

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