

FACILITATION: WEBINARS & VIRTUAL MEETINGS

CHECKLIST

- Rehearse & upload content in advance to prevent technical difficulties.
- Get set up well in advance of the start time to allow time to troubleshoot.
- Turn off other phones and your screensaver.
- Be sure to have something to drink.
- To prevent an echo, use a headset when using VOIP, and mute the sound on your computer when using a phone line.
- Have a clock close by so you can manage the time.
- Have a concise outline that uses simple, key words. It will keep you organized and focused on the specific goals/learning objectives.
- If feasible, have someone who can log in as a participant so they can make you aware of problems the participants are experiencing. They can also help monitor the chat area. If this is not possible and you have another computer, it may be helpful to log in as a participant so you can see the lag time between your clicks, animations and videos.

FACILITATING WEBINARS

- Get participants comfortable with the webinar platform by having them practice (e.g. raise your hand, write on the whiteboard and in the chat, etc.).
- If the facilitator(s) are not on a webcam, provide a photo(s) so they can visualize who is talking to them.
- Create suspense by mentioning something that you will be talking about later to entice them to stay engaged.
- Keep the pace fast enough to keep their attention but not too fast that they can't take notes.



- It is important to establish and maintain a high energy level. It keeps participants interest, increases the perception of self-confidence and energizes the topic indirectly (e.g. this must be important because he/she is excited about it). To stay energized and sound relaxed, you may want to stand up and walk around.
- If you want a presentation to be interactive, a general rule is to plan content for half of the time allotted (e.g. 30 minutes of content for a 60 minute call).
- Use audience polls to engage and learn more about your audience.
- Questions – It is important to provide time to ask questions. This honors participants’ experiences and you can use their comments to highlight the points you want to get across.
 - Webinar platforms with a ‘raise your hand’ feature prevent participants from talking over one another and give everyone a chance to speak.
 - Warm up your audience and build rapport with them before you start asking them questions.
 - Instead of giving them the answers right away, encourage conversation by asking questions.
 - It is important to take time to figure out good questions to ask. The quality of the question will determine the quality of the responses. Avoid compound and closed ended questions.
 - You may have to get them started so be prepared to keep it going (e.g. I often...).
 - Be sure to summarize the responses and ask follow-up questions to probe, redirect, etc.
 - If someone is dominating the conversation, jump in as soon as they take a breath (e.g. has anyone else had a similar experience) or cite time constraints. If you let them go on and on, you’ll lose everyone else.
- Chat – This feature gives you the opportunity to learn about your audience and the interaction helps them think more deeply about the material. Use it to challenge assumptions, gain a new perspective, think out a process, etc.
 - Get the chat started by asking an open ended question at the beginning (e.g. what is your biggest challenge?) and continue to ask them questions throughout.
 - If you have a hard time monitoring the chat area, build in breaks for questions. Tell participants to type them in as they think of them and you will answer them at designated intervals. Another option is to say “I’m going to pause for a minute to catch up with what has been going on in the chat.”
 - At the end, ask people to type in their takeaways.

FACILITATING VIRTUAL MEETINGS

- A facilitator must remain objective, neutral and build trust. Keep the discussion on topic, prevent group think, enforce the ground rules, involve/protect all members and ensure process clarity. Most importantly, you set the tone and mood for the group.
- Set ground rules in advance. Common ones include no sidebar conversations; no multi-tasking; participants must identify themselves when they speak; and using mute.
- Get the group to agree on a process for decision making.
- Take time to set an agenda and objectives for the meeting.
- Depending on the group, you may need to build in relationship building activities to develop trust, rapport and a feeling of openness.
- Provide a common visual focus (e.g. agenda, talking points, PowerPoint, virtually created documents, etc.) to keep the meeting on track.
- It is important to review what's been done, what's going to be done and make sure action steps (e.g. who by when) are set before ending the meeting. At the next meeting, follow up on the progress of those action steps.
- In some cases, you may need to get agreement on the problem before getting agreement on the solution.
- If there are some people not participating, it could be because they are more reflective. Try silent brainstorming before doing a round robin. Another option is to ask them what they think of a specific comment. These participants will often think of things the group hasn't expressed and it is important to get the entire group to buy in.
- At critical junctures (e.g. key agreement/decision, input required), call each person by name and ask if they agree or have an idea to share.
- Probe vague answers for their fuller meaning.
- Isolate the critical points and synthesize what you have heard the group say.
- Listen for non-verbal cues and hidden agendas. If you feel someone is not really onboard, see if you can draw it out (e.g. I want to make sure we hear from everyone. Sarah, what do you think?).
- Disruptive behavior can include negativity, dominating conversations, interrupting and much more. Try to stay compassionate as they are usually reacting this way because they are scared or are not feeling heard. Make them feel like their contributions are valued and find ways to prevent them from derailing the meeting. Citing time restraints can help and you can ask that the conversation be put it in the 'parking lot' (to be discussed further if time allows) or continued offline.

- Remember that the process is just as important as the results.
- Thiagi also has some wonderful tips for facilitators on his website, thiagi.com.

POWERPOINT

If there's no visual or you have the same visual for an extended length of time, their attention will wander. 88% of people multi-task during webinars (ReadyTalk.com)!

- Have twice as many slides as a face to face presentation.
- Use lots of graphics and simple text. Keep bullet points to a minimum.
- Don't build slides that require exact synchronization (due to lag time).
- Highlight what you want people to look at with either the webinar platform's drawing tool or by building highlights into your slide.