

A Guide to

Facilitating Digitally

mobiquity

An illustration of an open book. The left page is white with three horizontal lines representing text. The right page is blue with two white circles representing punch holes. The book is surrounded by several floating geometric shapes: a yellow circle, a blue rectangle, and a black oval. At the bottom, there are two pink curved shapes that resemble hills or waves.

Introduction

Sometimes it's necessary to have meetings fully remote and digital. By doing so a lot of the normal dynamics in a group change. This document will help you set them up for success. We'll not cover how to manage hybrid workshops where participants are both physical in the room and digital.

This guide has been created with the help of Henri Haarmans and Nel Mostert from the Facilitation Academy.

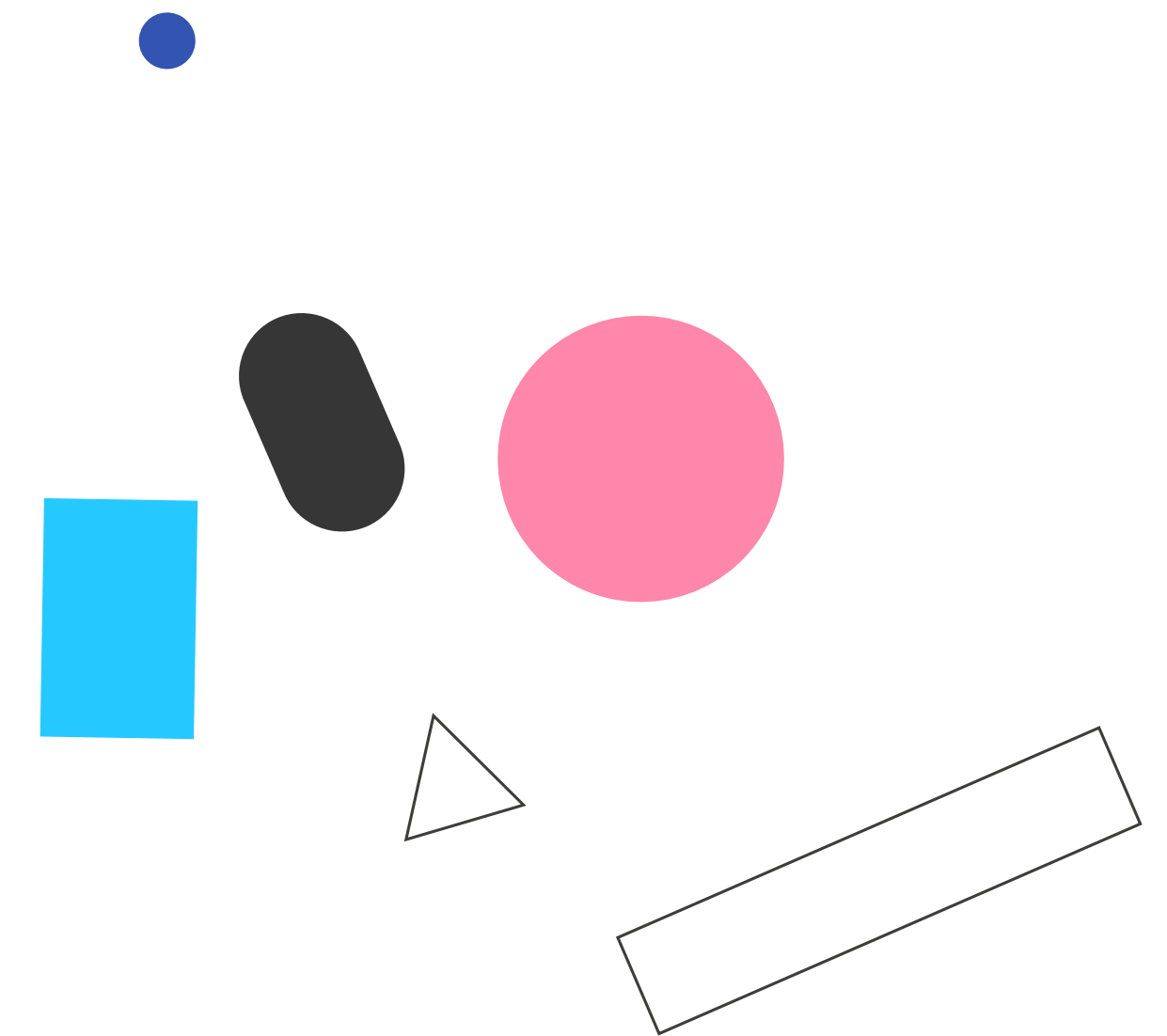


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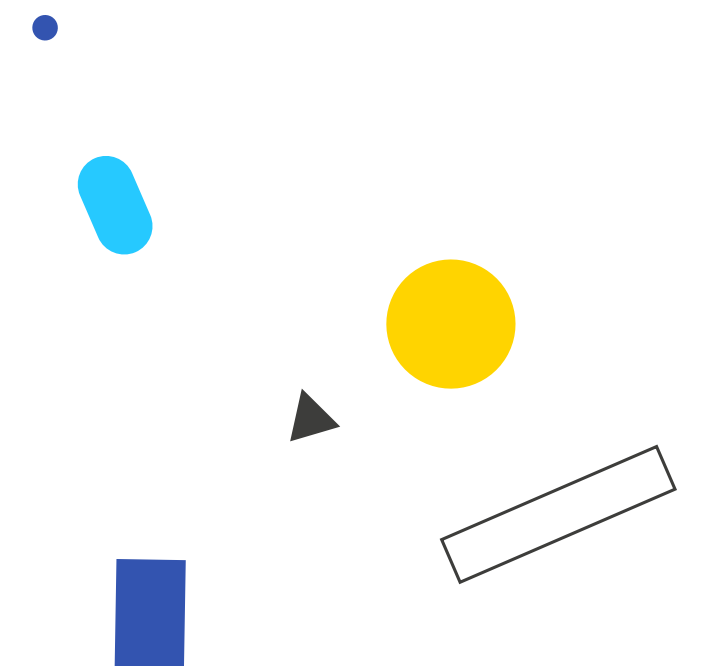
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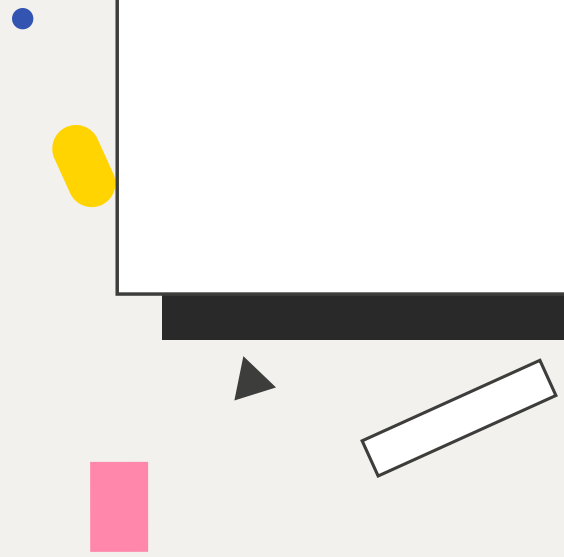
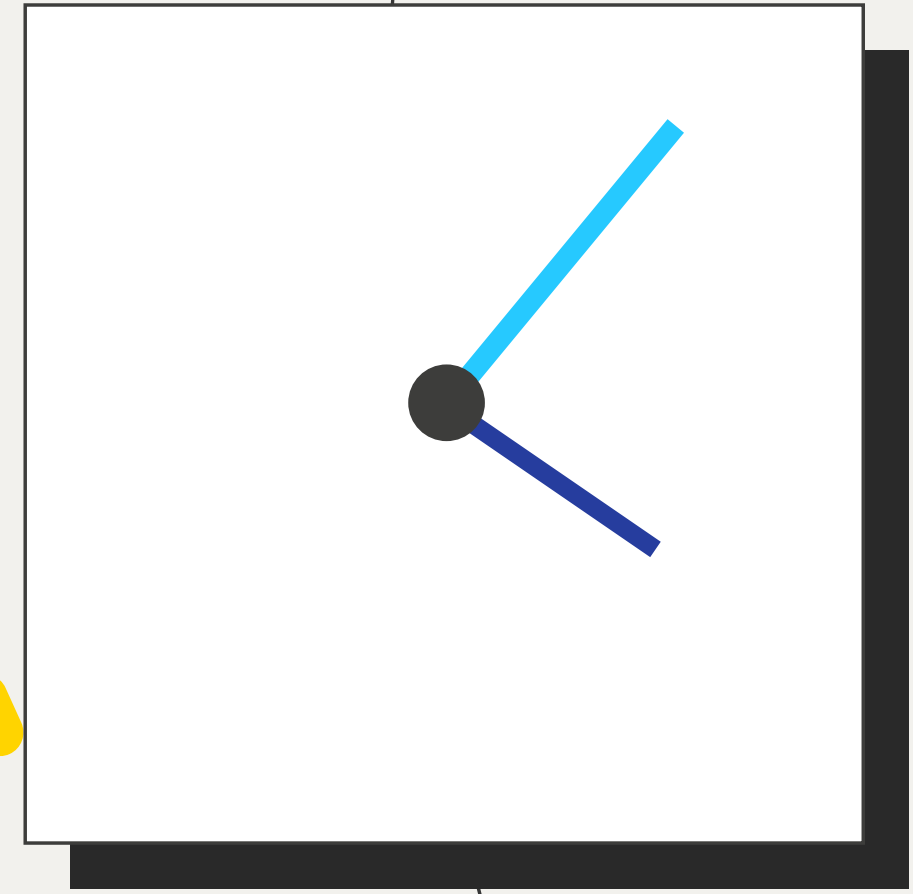
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How can you keep track of timings on assignments?

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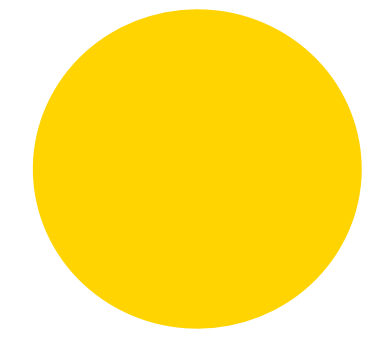




#1

Preparing

What does a facilitator do?

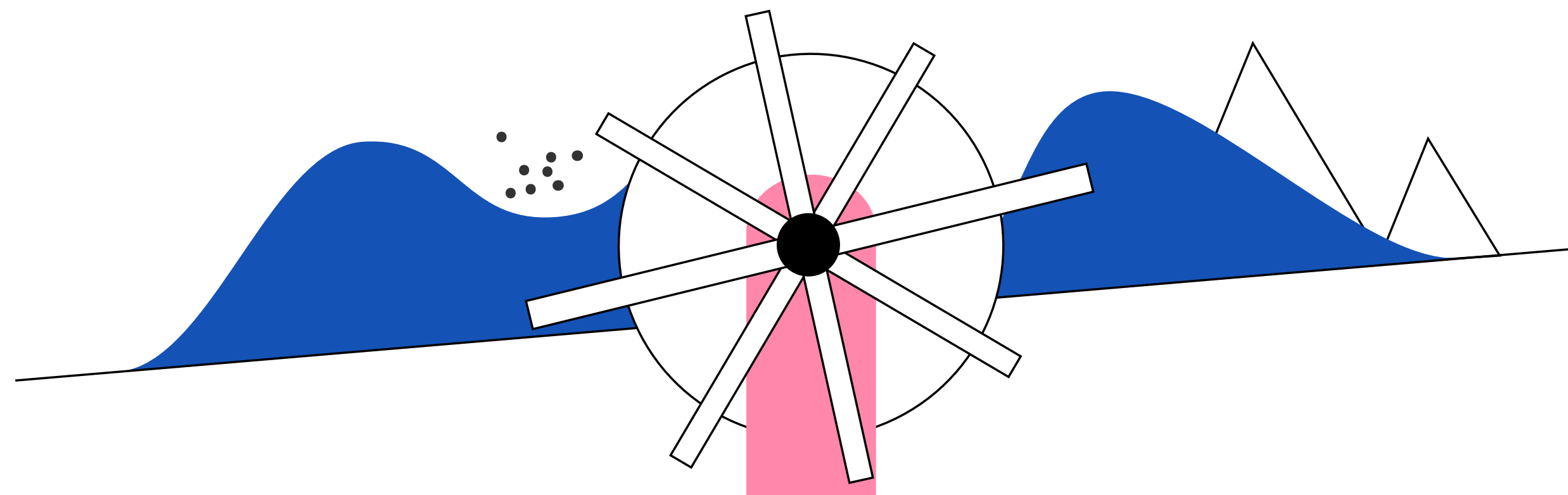


They are concerned with the process and responsible for getting a result. Strictly speaking, they do not interfere with the content.

At a consultancy this is often difficult as we hardly ever have a pure facilitator role, but more often a consulting role.

TIPS

- Think upfront what kind of role you play, it may be good to indicate to the group when you're facilitating and when you step into a consulting role.
- When presenting with two colleagues, discuss up front who takes which role
- In physical sessions the tip would be to not hold any pencil/ marker so you literally don't have your hands on the content. The same goes for digital, don't be tempted to start capturing what people say.



What type of session do I need to prepare? **Part 1**

There are 5 types of sessions, each has different needs.

Communicate

Knowledge transfer, hardly any interaction. *Example: TED-talks.*

Present

Knowledge transfer, room for interaction.

Example: training, press conferences

Moderate

A stakeholder is interested in the opinion of participants.

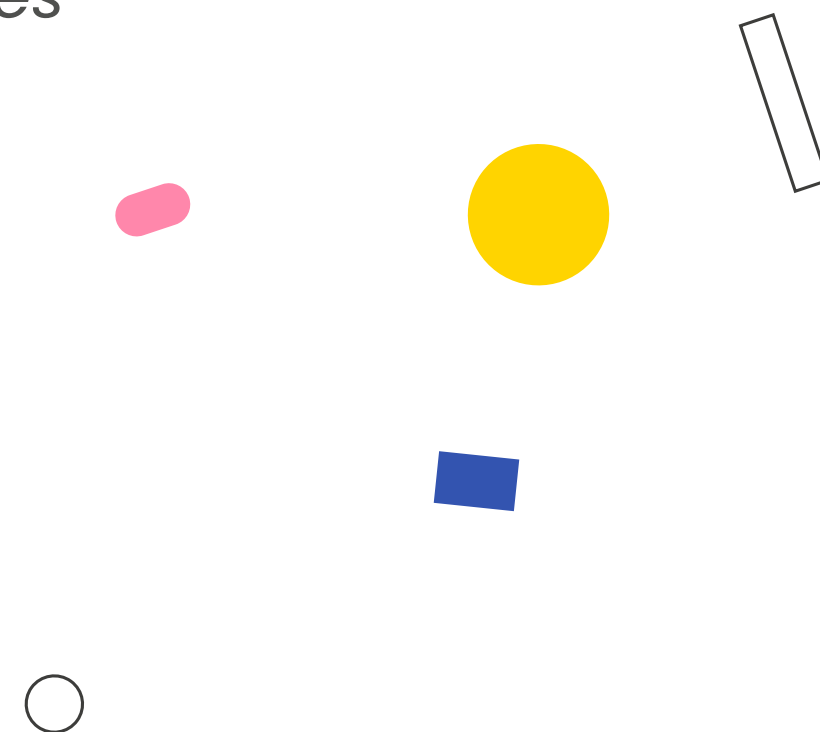
Example: intervision, public consultation evening

Stimulate

Participants answer questions, solve problems or formulate ideas for the stakeholder. *Example: brainstorming, workshops.*

Mandate

Similar to Stimulate but here the participants get a full mandate from the stakeholder within the scope. *Example: Scrum teams*



What type of session do I need to prepare? **Part 2**

TIPS

- Make sure you have a clear understanding of what the session type is.
- Make sure the invite clearly states the type of meeting. This creates clarity upfront.
- Make sure the agenda fits the type of meeting
- A meeting can consist of multiple types, e.g. training and practise sessions. Make sure to incorporate all of the above tips in your program clearly, so the participants understand what is expected.

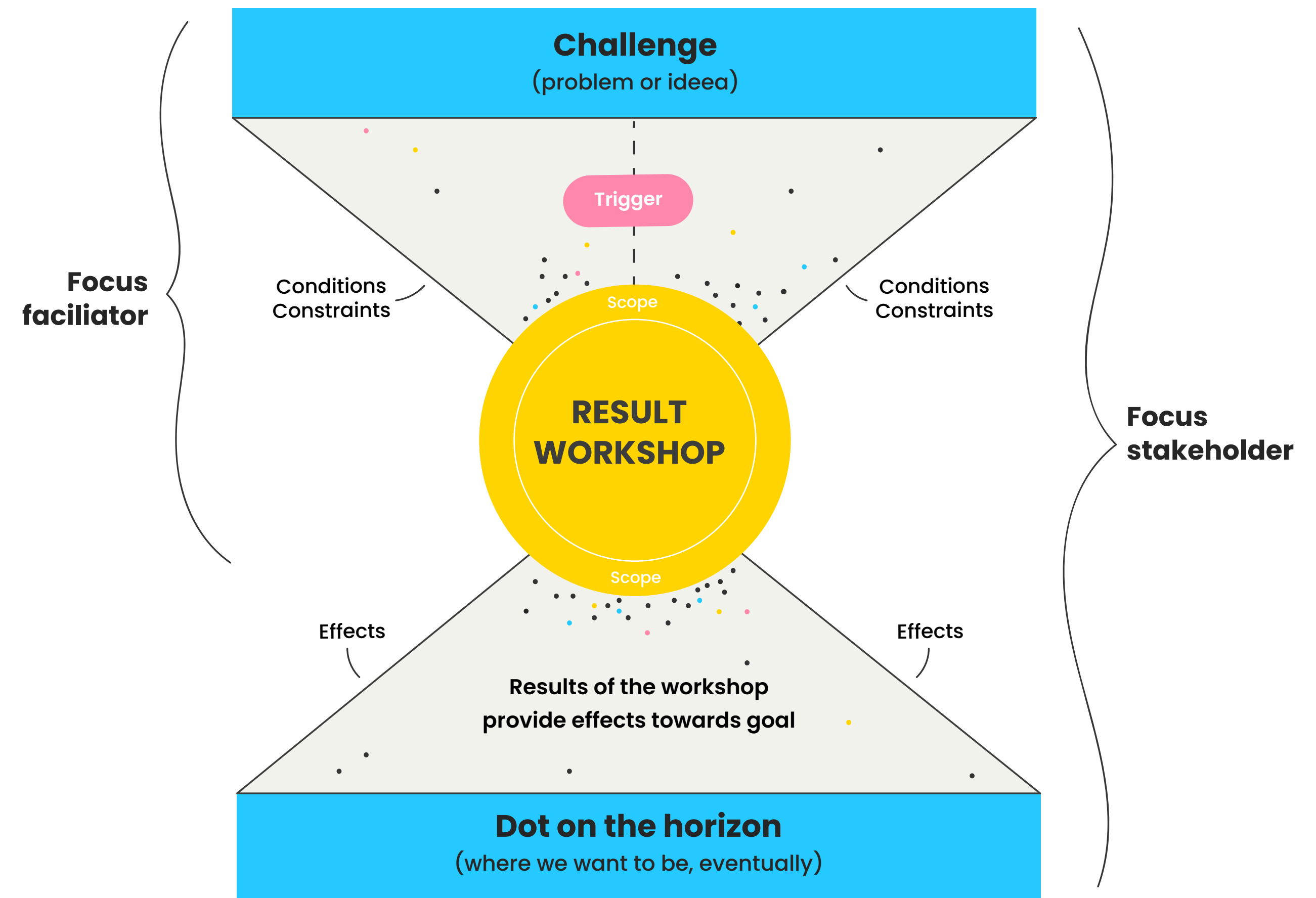
How do I know what to do in a session? **Part 1**

Use the hourglass model of facilitation as made by the Facilitation Academy and based on a model by Jo Bos & Ernst Harting¹.

The challenge, problem or idea is in the past, it's good to know but not the focus of the session. Focus lies on the result you're aiming for.

The goal (dot on the horizon) provides direction. It's the future vision from the stakeholder. The result and the goal of a session hardly ever coincide.

The result this is what it's all about, define what the desired result should be.



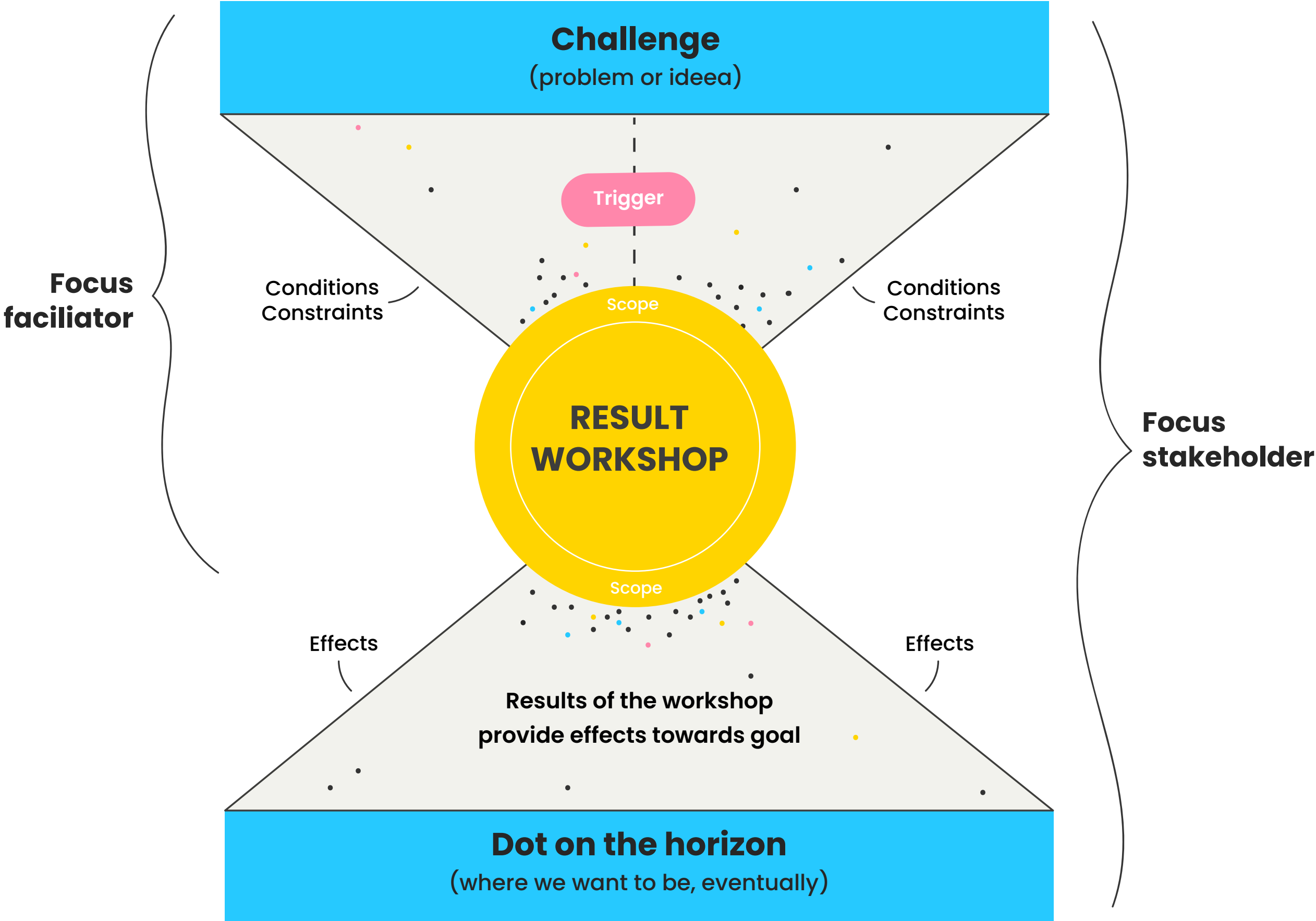
How do I know what to do in a session? **Part 2**

The trigger is that one event that led to the request for a session.

The condition constraints are about what is possible/impossible from the perspective of tools, rooms, agenda's of participants.

The scope is to help focus, so you can clearly indicate if something is not for that session.

The effects are the consequences of the session (next to getting to the result) Imagine the butterfly effect.



How do I know what to do in a session? **Part 3**

TIPS

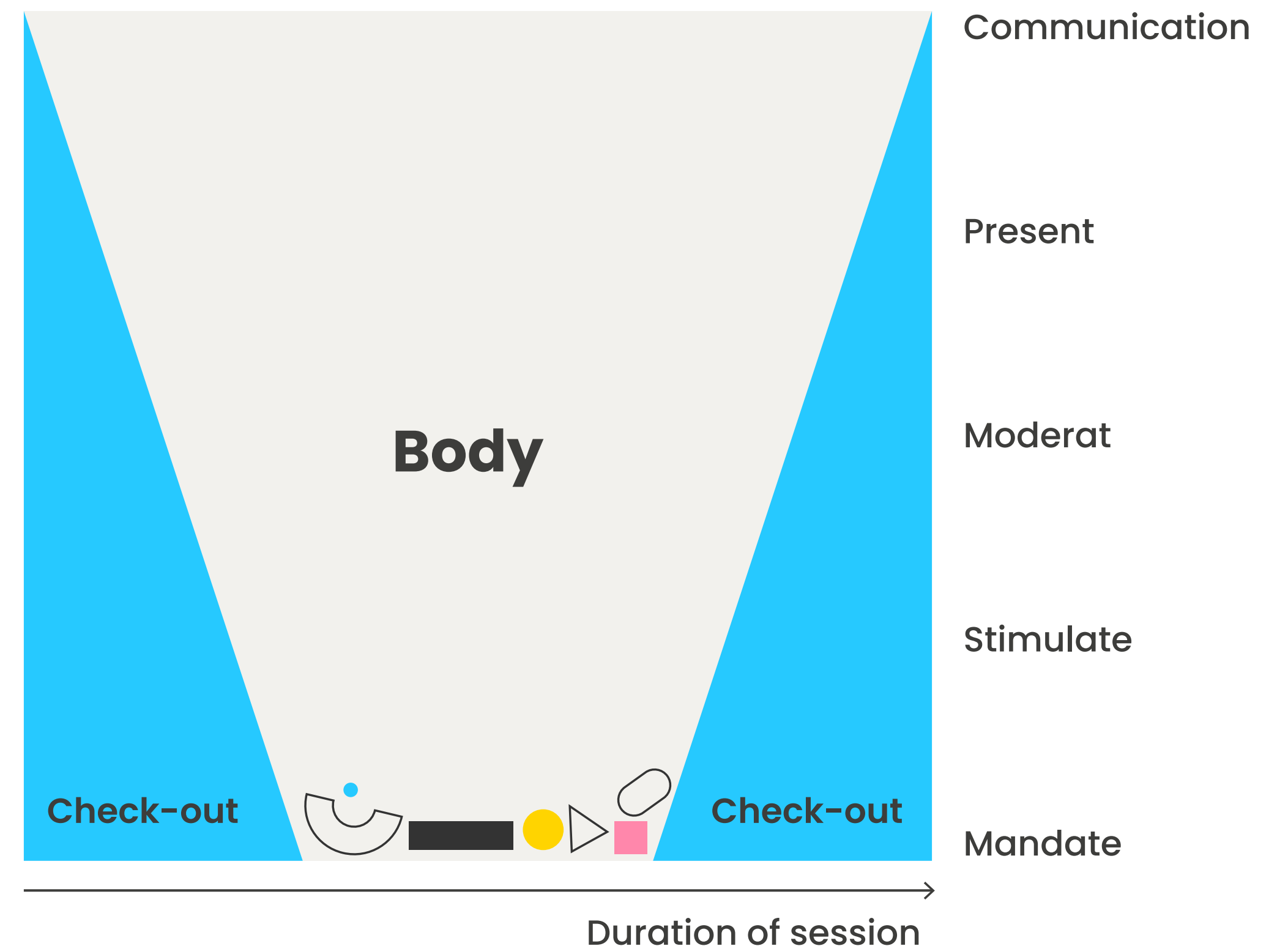
- Make sure you have clear who needs to be in the meeting, keep it small.
- Do the participants have the technical options to join effectively?
- Do the participants have experience with online meetings?
- Be sure to check if the meeting really has to continue at this point in time, is it possible to wait for a moment when you can do a physical meeting? (what will happen if we don't do the session now?)

What is the general structure of a session? Part 1

It always has three parts, a check-in, the body, and a check-out. Depending on the session type the body gets more time.

Check-ins are more than just an introduction. It's a moment to set the stage, introduce the subject, the context, the goal but also to see what everyone wants to get out of the session. The more interactive sessions get the more time you need for Check-ins.

Check-outs is where you wrap up the session, you conclude output, formulate action points, and get back to the personal perspective; Did everyone get out of the session what they were hoping?



What is the general structure of a session? **Part 2**

TIPS

- Make sure you have clear who needs to be in the meeting, keep it small.
- Do the participants have the technical options to join effectively?
- Do the participants have experience with online meetings?
- Be sure to check if the meeting really has to continue at this point in time, is it possible to wait for a moment when you can do a physical meeting? (what will happen if we don't do the session now?)

How do I structure the body of a session?

In general, you can use a wave with the following steps

Activate

Set the mood and energy, has nothing to do with content yet.

Diverge

Explore the content, generate ideas and views.

No judgments here.

Structure

Still no judgment, just group and order.

Converge

Now you can choose, clarify and conclude.

TIPS

- Try to execute one complete wave in a session block, or at least conclude the diverge.
- When you break up sessions, make sure to recap what we're doing from a process perspective so people know where they're at.
- The step to active people is crucial, this makes participants get involved.



How can I prepare my session? **Part 1**

TIPS

- Make sure everyone gets a copy of the agenda ahead of time. Be sure that the agenda is clear to everybody
 - Ask people to submit questions and comments in the chat box or via email before the meeting begins
 - Define agenda topics as a question
 - Be specific on how each topic will be dealt with
 - Be specific on the agenda about roles and assignments
 - If there's something you want everyone to prepare for, place that on the agenda
- Set time limits for each topic. Use a timer and communicate the time for it
 - Keep presentations to a minimum
 - Make sure everyone has the right tools at home, post-its, markers or whatever else you would normally prepare for them
 - Ask everyone to find a quiet place
 - Be specific on the agenda about roles and assignments
 - Assign additional roles:
 - **Timekeeper**
 - **Note taker**
 - **Chat moderator**

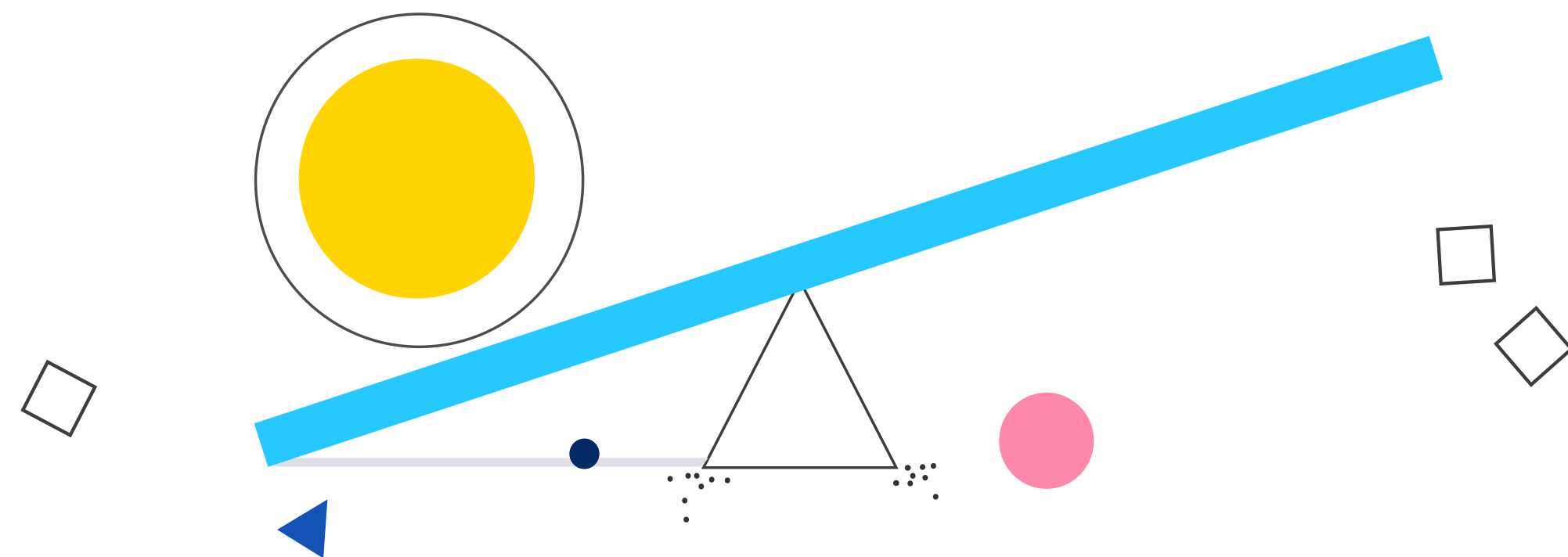
How can I prepare my session? **Part 2**

TIPs Technical

- As the facilitator, make sure you have two monitors. One where you have all the participants, the other where you can have your workspace.
- Start early, prepare and test your setup.
- Allow time for people to dial in.
- Make sure you have someone on call who can help with technical issues.
- Have a backup facilitator when you are the one with technical issues.
- If participants don't know the software, plan time to explain it at the start.

How long can a digital session last?

It's difficult to keep attention in a digital meeting, so generally speaking, you want to keep them short. 60-90 Minutes is probably a good upper limit.



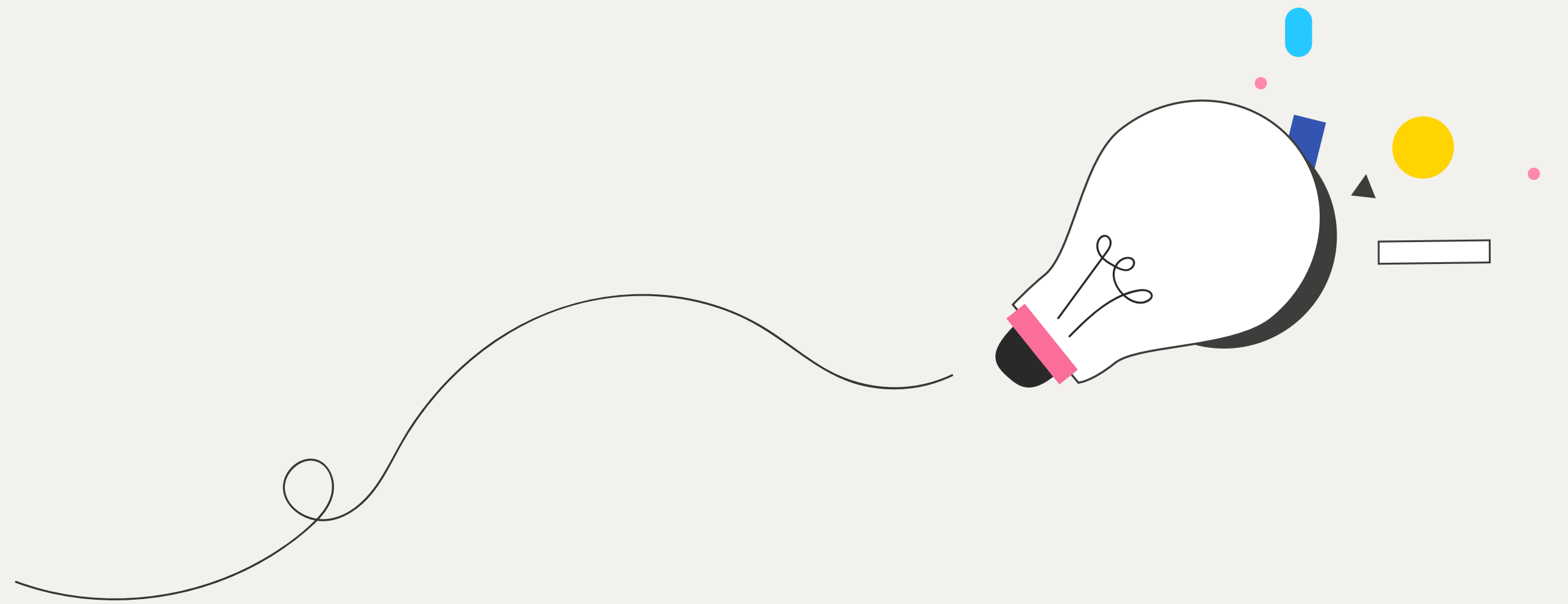
TIPS

- When the session type is to Communicate, make sure the stakeholder brings his message back to the essence. More context can be shared afterward.
- When the session is to present something you can interview the stakeholder and share a short video with the essence.
- Consider planning multiple sessions of 60-90 minutes. In between sessions, you can plan for individual offline assignments and present it in the next session.



#2

Tools and technical tips



What tools are good to use?

We have Zoom of course. Hangouts or Skype are good alternatives when you have business accounts. Let the client select what works for them, while being conscious if you can still deliver a good session.

Zoom also allows you to set up a simple polling in zoom.

For those who have access to Miro, it can be used to host internal sessions and is ideal for ideation, creations, brainstorming, canvas filling, etc.

InVision has Freehand, this is free to use when someone with an InVision account sets it up. It has very limited features but easy to get into without accounts needed.

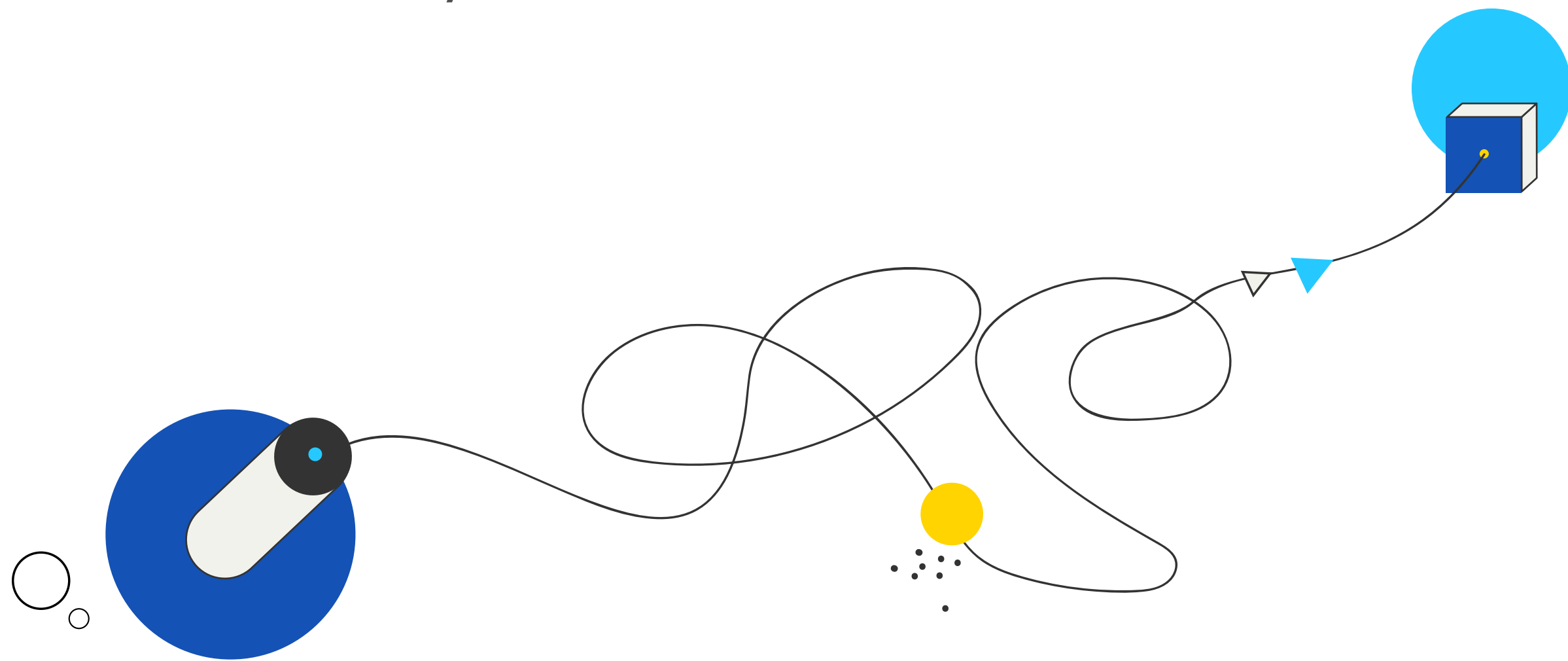
TIPS

- Make sure participants have no echo, a good microphone, and a stable internet connection.
- Provide a telephone connection when internet is unstable (standard in zoom)

How to deal with connection issues?

Consider using 2 tools, Zoom for calling in through land-line or any other conference call provider.

Now you ensure sound is stable. Use the second tool for presentation sharing (zoom for minimal interaction) or any of the other interactive tools.



TIPS

- Turn all video off IF possible, this can only work in very limited cases.
- Get your participants to coordinate at home the usage of the internet. So maybe hold that download, have the kids reduce the video streaming and gaming for a little bit.

How can I still do polling?

Yes, there are online ways to facilitate it however it's also possible to use hand gestures.

1 finger

Totally disagree

2 fingers

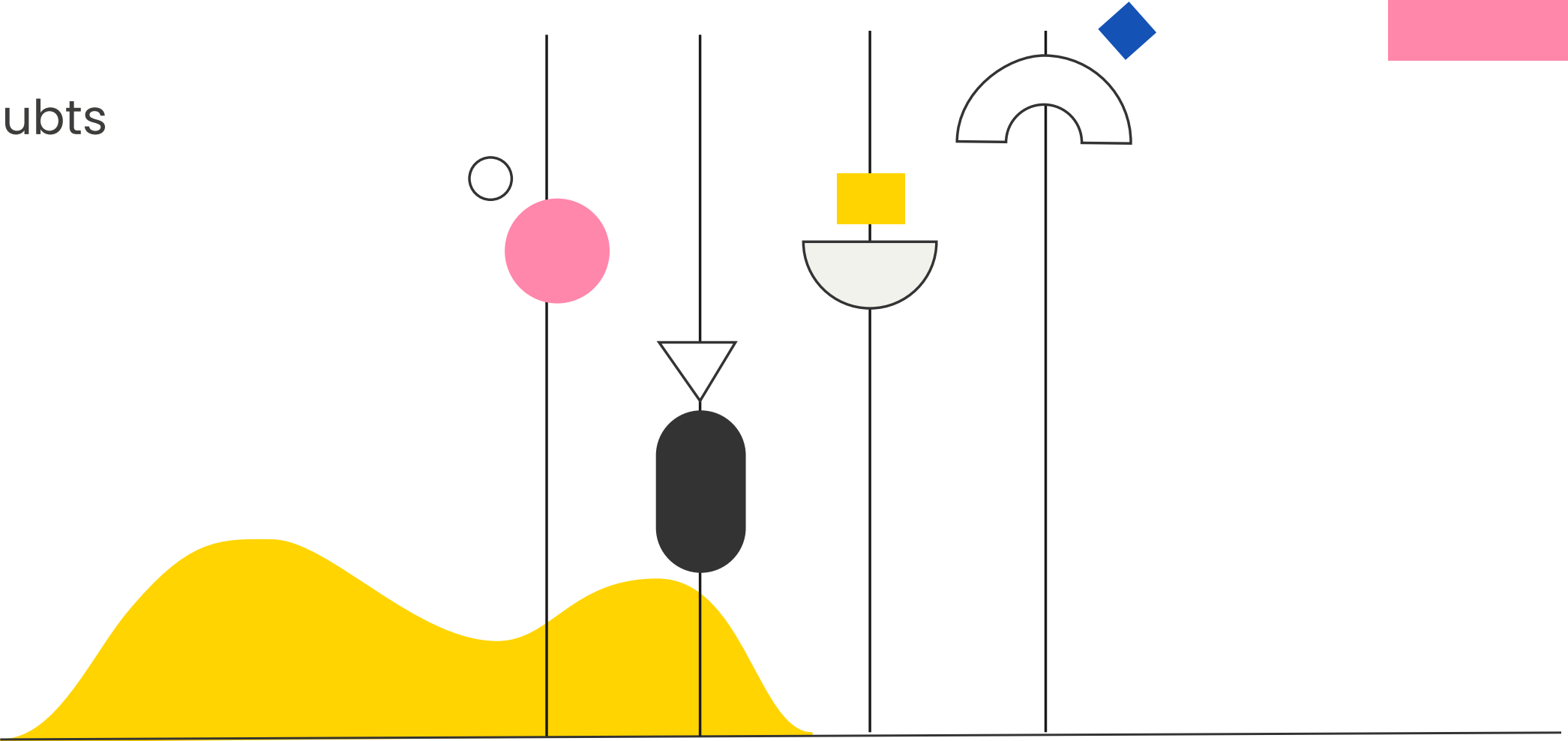
Disagree, but I see some good points

3 fingers

Agree, but I have some doubts

4 fingers

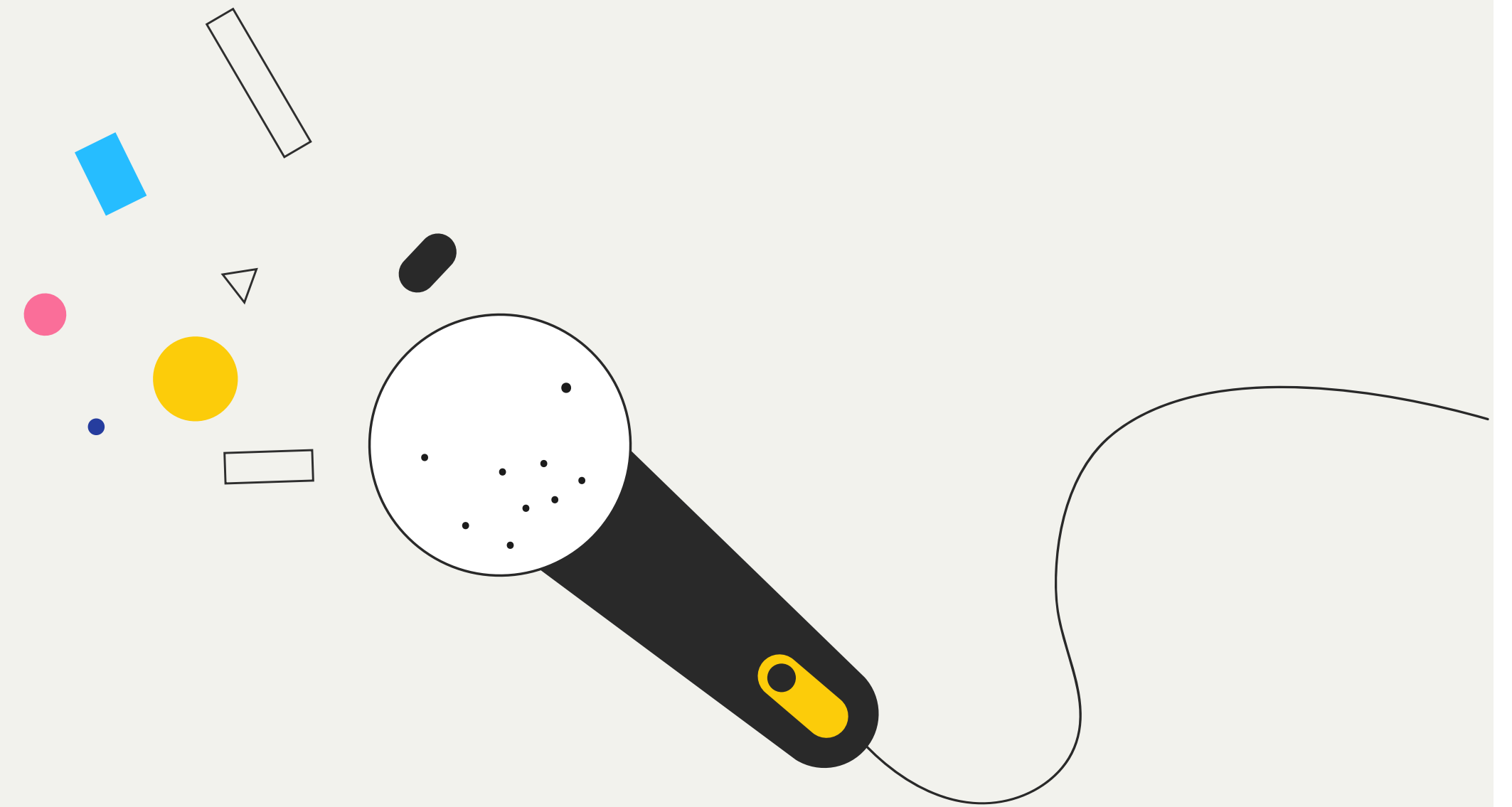
Totally agree



TIPS

- Use polls early to illustrate an interactive meeting
- Show poll or survey answers in real-time
- Mentimeter is good to explore





#3

Execution

How can you keep track of timings and assignments?

Normally you would have a timer on the screen, you can still do that and share the screen.

Alternatively, you can turn on music and turn it off when the time is up. This also creates a shared sensory environment and helps towards the feeling of collaborating together.

TIPS

- Some tools, like Mentimeter, facilitate timed exercises. You can set-up the time per exercise upfront. The participants get a clear signal when time is up

How can i keep participants engaged, involved and energized? **Part 2**

TIPs

- Find some good energizers that are made for digital here: <https://blog.mural.co/online-warm-ups-energizers>
- Do a good check-in
- Use the names of participants regularly
- Show appreciate, mention what goes well
- Make sure everyone gets the chance to speak
- Let other people answer questions, mention their names

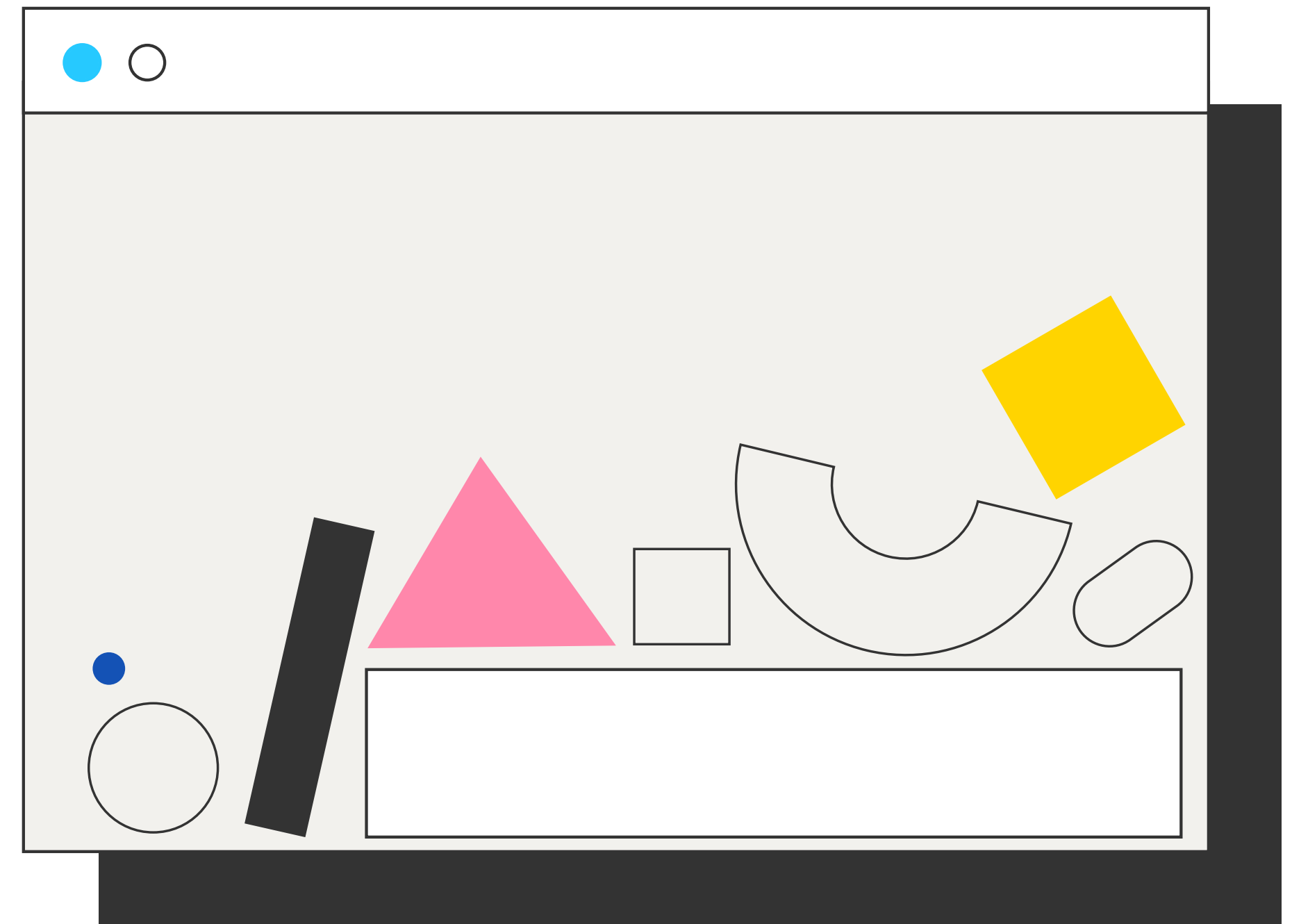
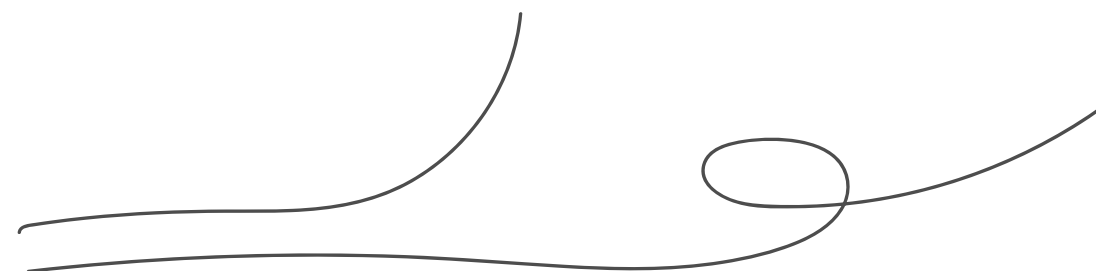
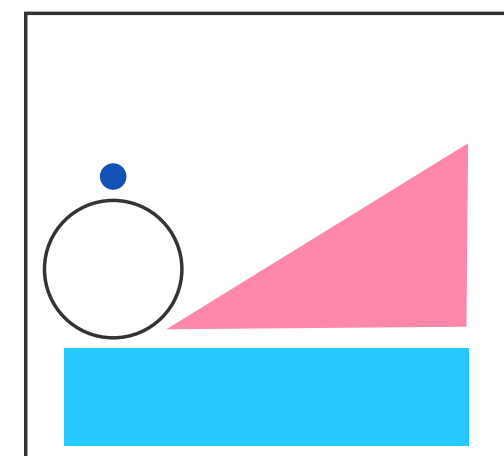
- Promote discussion through open-ended questions
- Call out participants and ask their opinion on what's being discussed
- Make a group picture of all videos
- Assign tasks to people "When I get to this subject, please remind me to..."
- Have people ask questions in chat, present them as they're happening as long as they are on topic

Can I work in groups still?

Yes you can. Make sure you make groups of 2 or 3, then the participants always need to be engaged.

You can setup multiple rooms in Zoom to facilitate breakout sessions.

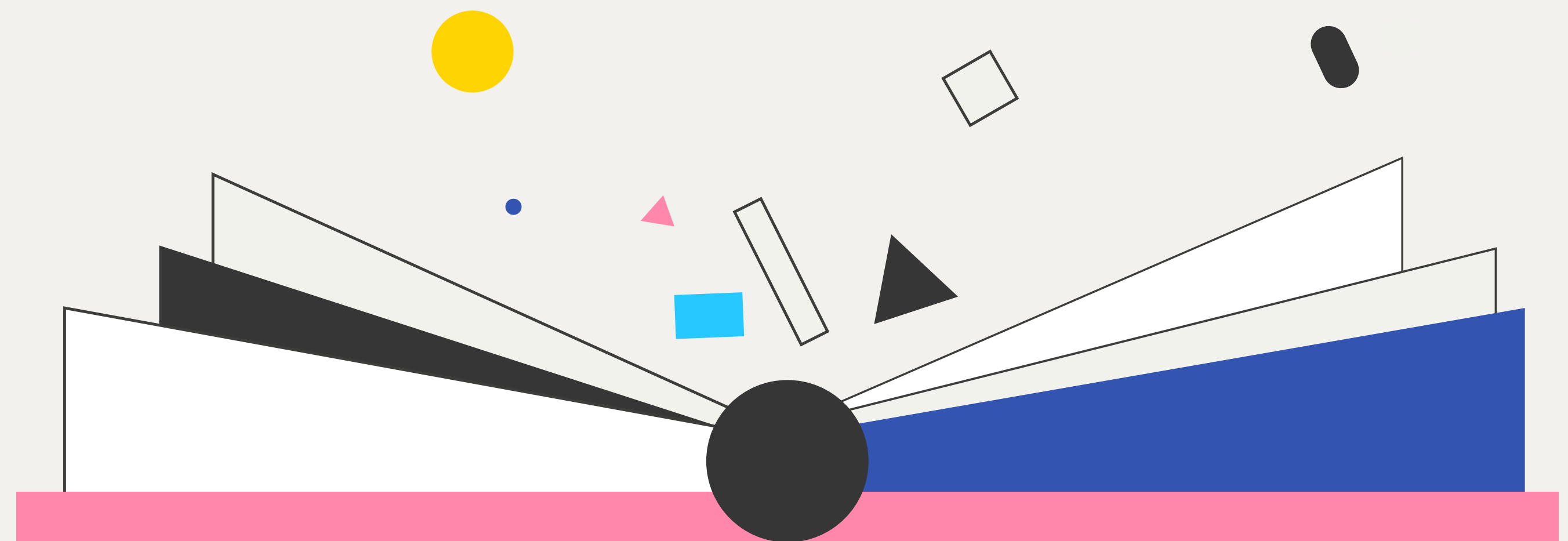
<https://support.zoom.us/hc/en-us/articles/206476093-Getting-Started-with-Breakout-Rooms>



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Help us make this better

stakken@mobiquityinc.com



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Reference

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2. Gardner, Howard. (1983) "Frames of Mind: The Theory of Multiple Intelligences." New York: Basic Books.
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