



Designing and Leading Virtual Meetings



Dial: 877-853-5257
Webinar ID: 987-0243-5725



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Today's Speakers

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Principal & Founding Partner



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Today's Objectives

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- Define the purpose of a meeting you are planning
- Design a remote meeting agenda with an emphasis on participant collaboration and interaction
- Develop your facilitation practice



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Today's Agenda

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- Strategies for Designing and Leading Virtual Meetings
- Remote Meeting Demo
- Q&A

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Overview

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Designing and Leading Virtual Meetings

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Overview

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- Framing Your Meeting
- Developing Your Facilitation Practice
- Using a Facilitation Blueprint

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Framing Your Meeting

Developing Your Facilitation Practice Using A Facilitation Blueprint

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- Sets the stage for every decision you make in its planning and execution.
- Allows you to make good decisions on who to include at the meeting and what to include in the agenda.
- Includes understanding participant needs, defining outcomes, and articulating assumptions.



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Understand PEOPLE

Who are the participants?
What are their needs, motivations, and goals?



Define OUTCOMES

Are your outcomes specific enough and actionable?



Articulate ASSUMPTIONS

What must be true in order for this session to be successful?



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Understand PEOPLE 

Who are the participants?
*Small, scrappy team of 8 employees
 At the company for a long time but new to social media; use it rarely in personal life*

What are their needs, motivations, and goals?
*Need to improve their social media skills after years of resisting, limiting themselves to blogging and LinkedIn
 Wants to learn ways to engage new technology and audiences with compelling storytelling, to feel confident in time for their fall campaign*



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Define OUTCOMES 

Are your outcomes specific enough and actionable?

GENERAL
To learn more about social media

SPECIFIC AND ACTIONABLE
*To learn and apply techniques for engaging audiences in new ways
 To establish a creative practice around crafting inspiring content on social media*



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Articulate Assumptions 

What must be true in order for this session to be successful?

HUMAN

- Team members will be present and participating throughout training sessions
- Team members have time and support to complete agreed-upon homework

TECH

- Team members have reliable Internet connections and can access Google slides



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Understand PEOPLE

Who are the participants?
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At the company for a long time but new to social media, use it rarely in personal life

What are their needs, motivations, and goals?

Needs to improve their social media skills

Wants to learn ways to engage new technology and audiences with compelling storytelling, to feel confident in time for their fall campaign



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Framing Your Meeting
Developing Your Facilitation Practice
Using A Facilitation Blueprint

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Foundational Behaviors of Facilitators

ADVANCED

INTERMEDIATE

BASIC

Adapting Agenda
Modeling Healthy Feedback Practices
Managing Power Dynamics and Power Struggles

Staying on Task
Democratizing Participation
Summarizing Points

Establish Agenda Keep Time
Set Ground Rules Give Clear Instructions

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Remote Considerations

Foundational
Behaviors of
Facilitators

+

HUMAN
Absence of Physiological
Connection
Absence of Visual Cues

+

TECHNICAL
Technical Literacy & Access
Technical Difficulties &
Management

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HUMAN Remote Considerations

Physiological Connection

In person, humans use touch, eye contact and our ability to match heart rates to build trust and empathy

Tips

Use visual activities

Establish rituals to reinforce connection

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HUMAN Remote Considerations

Visual Cues

We often catch facial expressions, but miss signals about how people are feeling like hand gestures and posture

Tips

Use group norms

Use facilitator narration

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TECHNICAL Remote Considerations

Access & Literacy

Understanding your participants' access to software and high-speed Internet will determine if they can participate or not

Tips

Use online tools that meet the lowest level of access

Use icebreakers to practice new technology and create connection

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TECHNICAL Remote Considerations

Difficulties & Management

There are many places where technical difficulties can disrupt, or completely derail, a session

Tips

Have a contingency plan

Use transparency and humor in the face of technical difficulty

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Platforms to Consider

Live Discussion

[GOOGLE MEET](#) [CISCO WEBEX](#) [ZOOM](#) [GOTO MEETINGS](#)

Live Deliverable Creation

[GOOGLE DRIVE](#) [NOTION](#) [MICROSOFT 365](#) [EVERNOTE](#)

Live Focused Collaboration

[MIRO](#) [CONCEPTBOARD](#) [PADLET](#) [MURAL](#)

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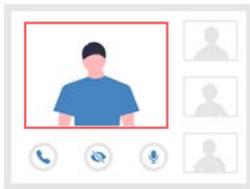
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Remote Meeting Principles

Well-tested guidelines you can use to facilitate a better remote experience for your participants



- 20% Tech Buffer Time
- Activity for Tech Onboarding
- Verbal Communication & Tech Guidelines
- Make Human Connections
- Contingency Plan

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Josh's VISTA Virtual Meeting Experiences

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- Internal Team Meetings vs. External Client Meetings
- Platforms Used
 - Pros/Cons
- Gaps Discovered/Addressed
- Tips:
 - Consider Message/Email/Meeting Rule
 - Be Precise
 - Provide Outline/Agenda
 - Define Roles
 - Camera When Possible



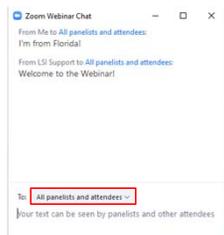
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Chat Question

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What are your favorite remote meeting tips?



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Using a Facilitation Blueprint

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Using a Facilitation Blueprint

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Facilitation Blueprint

A diagram you can use to map out your participant's experience over time, from the moment they learn about your session, through the completion of their action items from the session

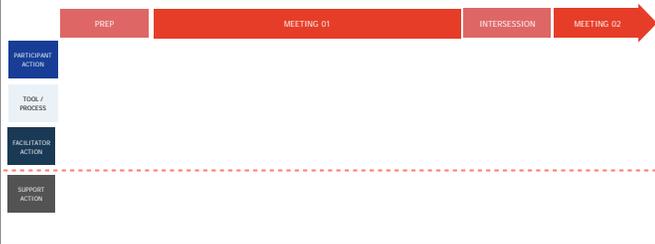
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Using a Facilitation Blueprint

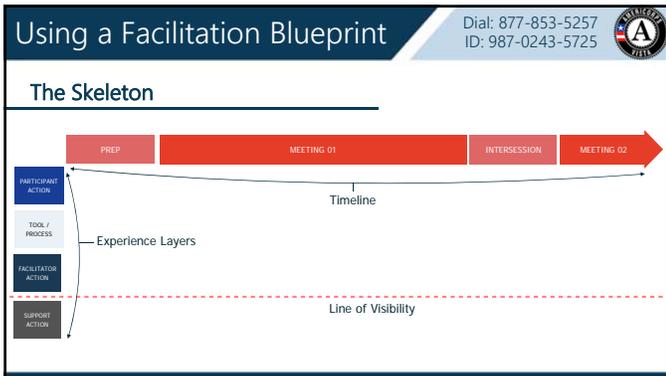
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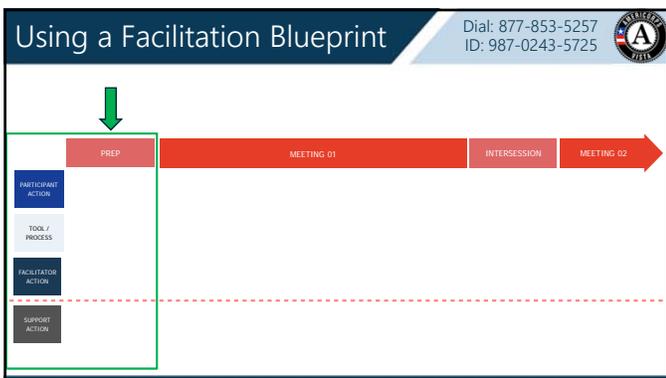
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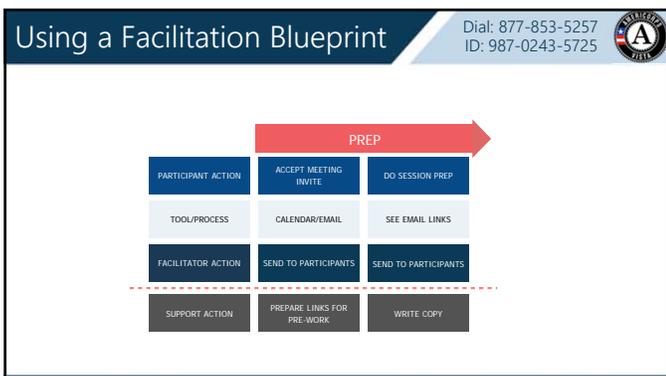
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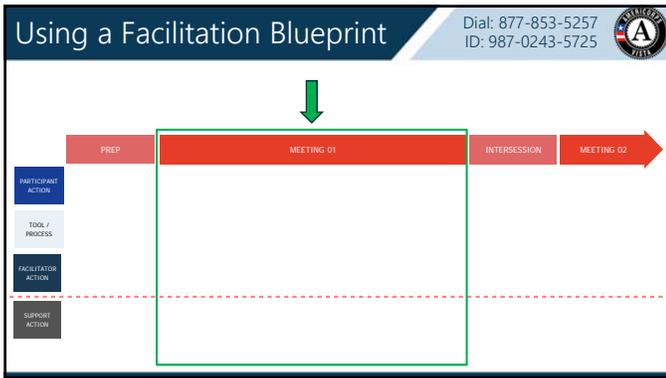
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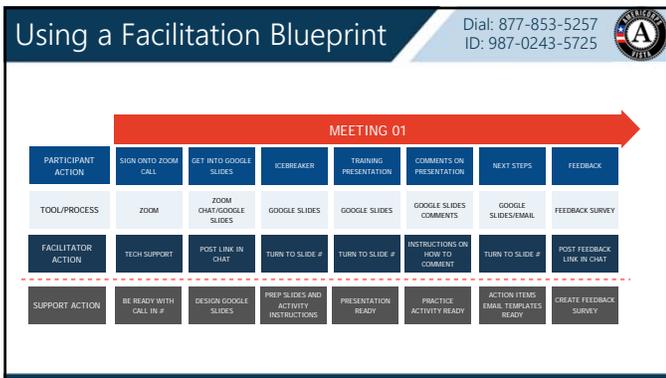
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Some Strategies Covered:

- Facilitator Narration
- Verbal Communication & Tech Guidelines
- Visual Activities
- Activity for Tech Onboarding
- Modeling Feedback
- Make Human Connections
- Democratizing Participation
- Contingency Plan



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- How can we improve this presentation?
- Please take a few moments to complete a brief evaluation survey once we log off today.
- Find the survey link in the Chat on your screen.
- Thank you for your feedback!

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What questions do you have?



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**Starting Off Strong: Professional
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Wednesday, August 26, 2020
3-4:00 p.m. ET / 12-1:00 p.m. PT

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Thank you!

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