

Virtual Facilitation

For Lean Practitioners



What are you grateful for today?

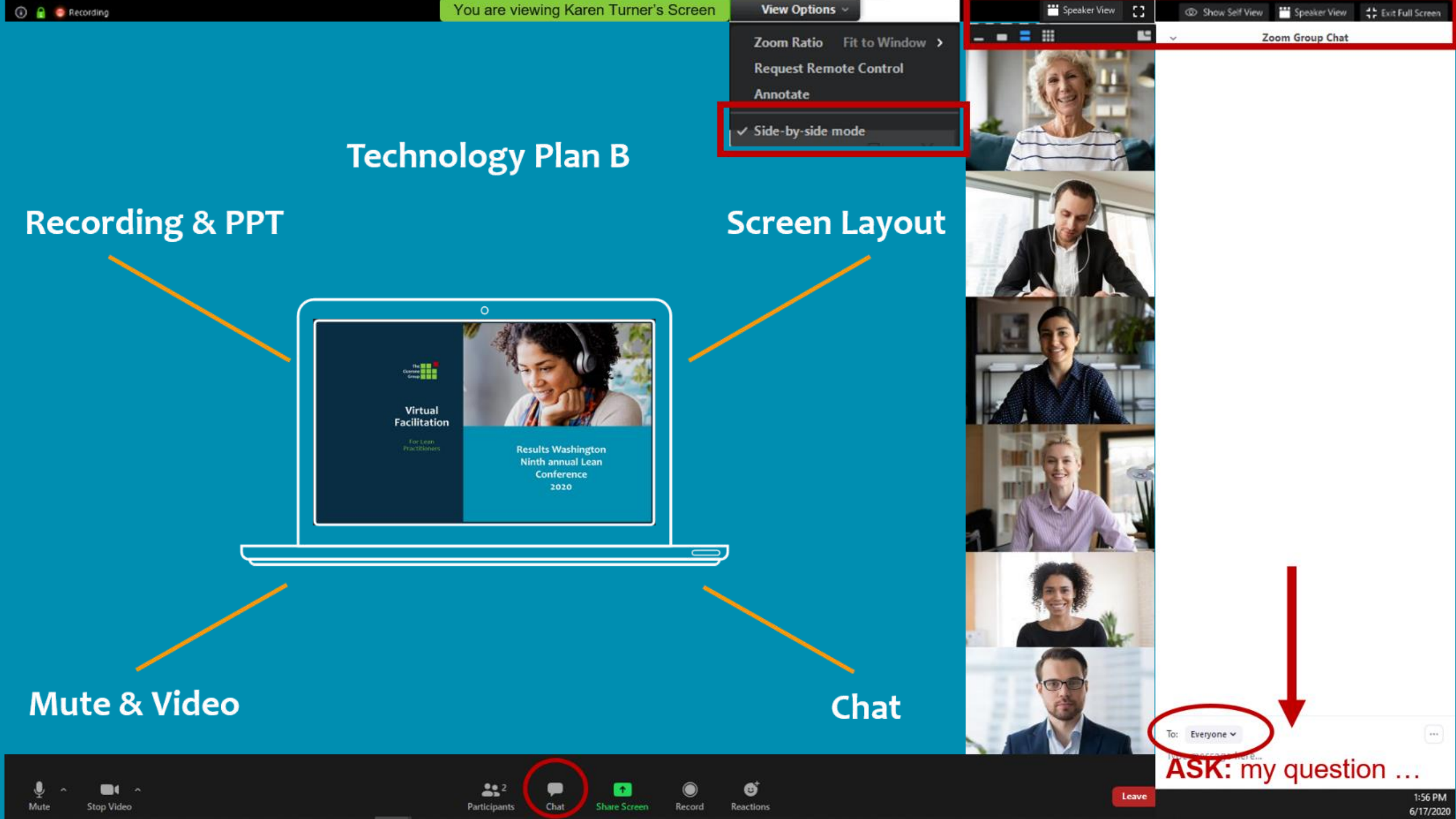
Take a deep breath ...

Breathe in for a count of **4**

Hold for a count of **7**

Then exhale for a count of **8**

Repeat as often as needed!



Technology Plan B

Recording & PPT

Screen Layout

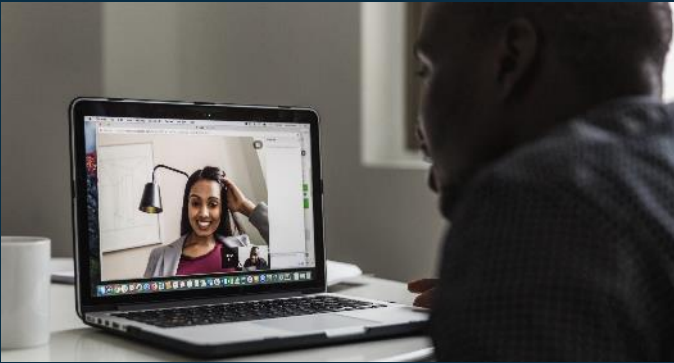
Mute & Video

Chat

ASK: my question ...

Agreements

Getting the most out of our time together



Communication

Use chat

Mute, except to talk

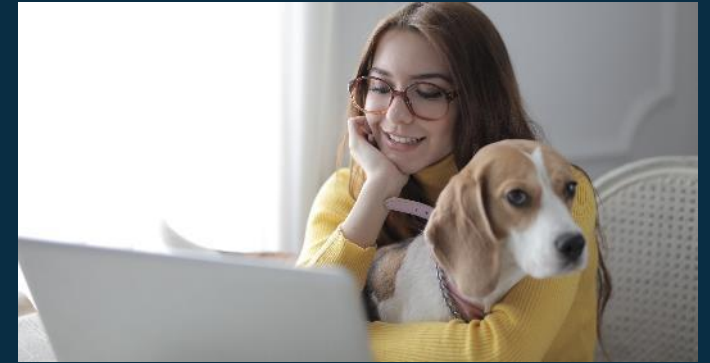


Collaboration

Remove distractions

Be present & focused

Actively participate



Compassion

Demonstrate empathy

Be open, curious & supportive



Quick Introductions

Location

In 10 words or less ...

**What do you like
best about working
from home?**

Karen
Jason
Jane
Ariane
Carrie
Sarah
Jessica
Michelle
Paul

Poll: Who's In the Room?



Which of these roles best describes your primary work role? (Choose 1)

- Leader of people
- Lean/project team facilitator
- Educator
- Subject matter expert
- Student
- Individual contributor
- Consultant

Some Clients Who Have Worked with The Cicerone Group...



Poll: Challenges with Virtual Meetings ?



What challenges are you experiencing in virtual meetings?
(Select all that apply)

- Feeling disconnected
- Multi-tasking
- Lack of engagement
- Talking over one another
- Feeling self-conscious
- Lack of productivity
- Lack of commitment
- Technology challenges

Your Handout is the Agenda

Gratitude: What are you grateful for today?		
	Tips & Techniques	Application
S et for Success <input type="checkbox"/> Capture Mindshare <input type="checkbox"/> Familiarize the Technology <input type="checkbox"/> Use Agreements <input type="checkbox"/> Incorporate Warm-up Introductions		
E ngage Everyone <input type="checkbox"/> Hook Their Attention <input type="checkbox"/> Maximize Team Time <input type="checkbox"/> Design Meetings for the Virtual Environment		
C reate Commitment <input type="checkbox"/> Build the Foundation <input type="checkbox"/> Use Individual Tactics <input type="checkbox"/> Use Group Tactics		
My Commitment: One idea I am most excited to apply is...		

Set for Success

1

Capture Mindshare

2

Familiarize the Technology

3

Use Agreements

4

Incorporate Warm-up
Introductions



Method to the Madness

1. Welcome
2. Novelty
3. Safe space
4. Get people talking
5. Cueing



Virtual Facilitation Tips

How will you apply
Set for Success tips
in your virtual
meetings?

- Capture Mindshare
- Familiarize the Technology
- Use Agreements
- Incorporate Warm-up Introductions

insight & connection

Dr. David Rock,
NeuroLeadership
Institute

What questions do you have?



Engage Everyone

1

Hook Their Attention

2

Maximize Team Time

3

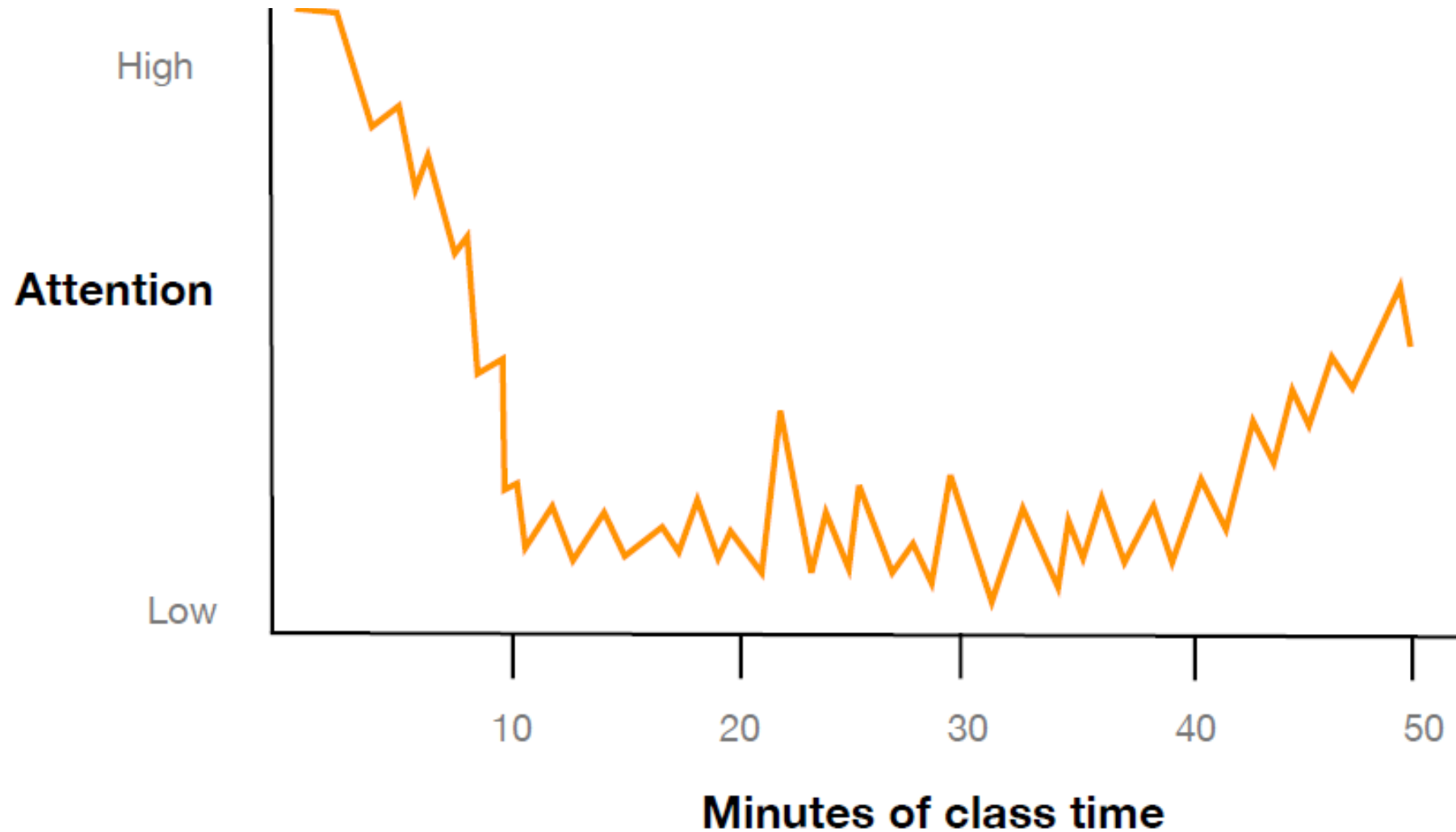
Design Meetings for the Virtual Environment



A woman with blonde hair is wearing a black Oculus VR headset. She is looking slightly upwards and to the right. The background is dark. The word "Imagine..." is written in white text to the right of the woman.

Imagine...

Hook Their Attention - Remember the 10-minute rule



Source: www.brainrules.net/attention



Maximize Team Time

1. Before

Prime the Pump

2. During

Brainstorm, Discuss,
Prioritize, Decide

3. After

Action Items & Next Steps

View Options

- Zoom Ratio Fit to Window >
- Request Remote Control
- Annotate
- Side-by-side mode

Mouse Select **T** Text Draw Stamp Spotlight Eraser **Format** Undo Redo Clear Save

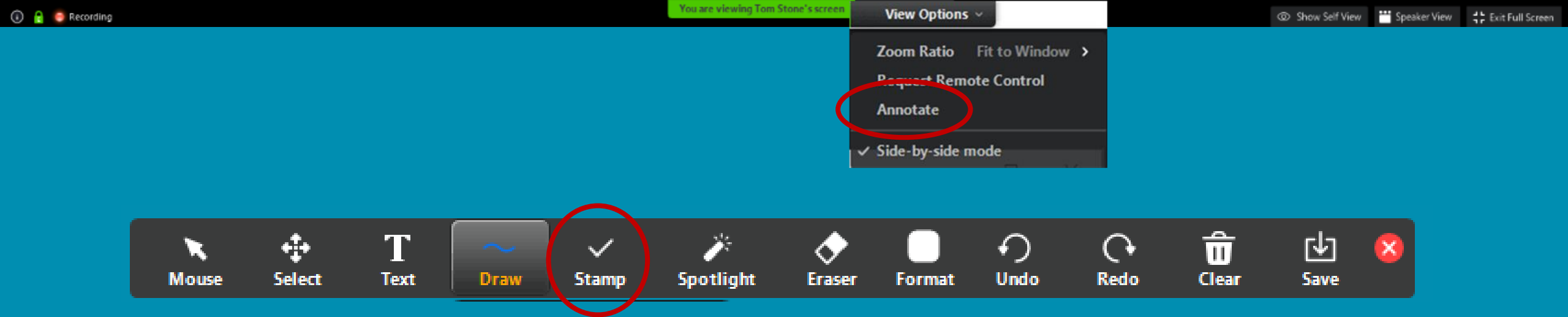
Line Width

Font

B / 24

What ideas do you have for streamlining this process?

1	1 - Jason	7
2	2 - Jane	8
	3 - Ariane	
	4 - Amy	
3	5 - Karen	9
	6 - Carrie	
4	7 - Sarah	10
	8 - Jessica	
5	9 - Julie	11
	10 - Michelle	
	11 - Tracey	
6	12 - Paul	12



Now, using the Stamp annotation tool, put a check mark next to any of the ideas you would support exploring further...

Virtual Meeting Design

1

Change slides every 30-120 seconds

2

3



www.pixabay.com
www.pexels.com

Virtual Meeting Design

1

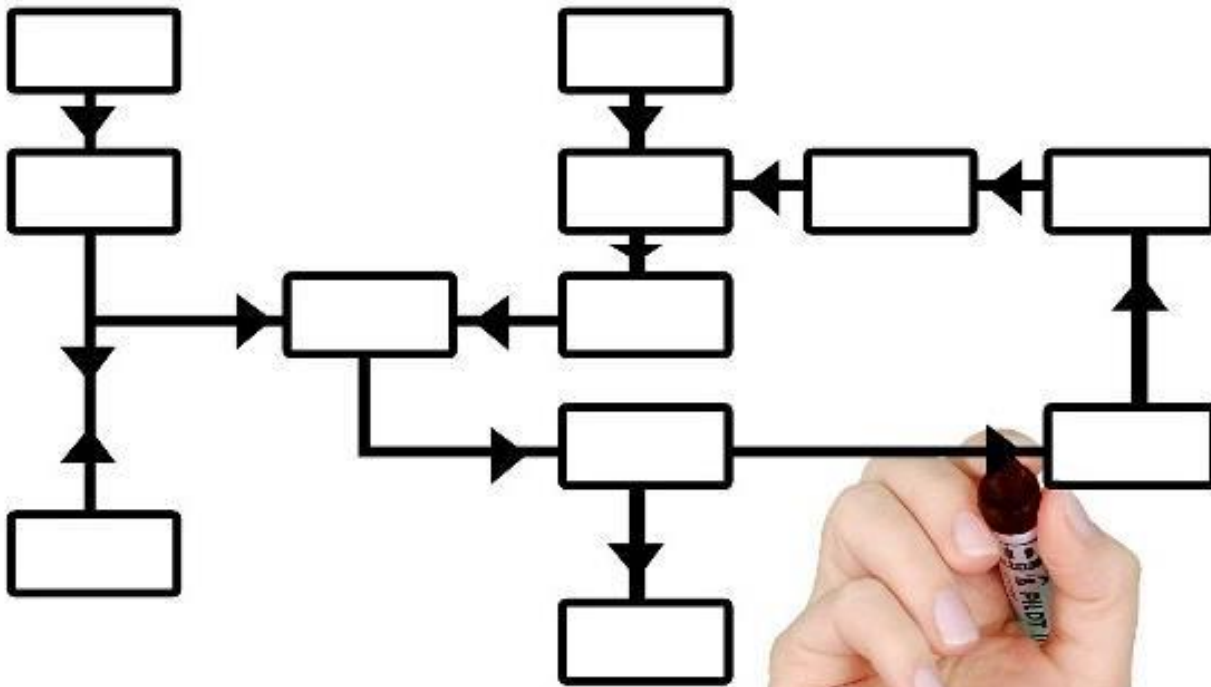
Change slides every 30-120 seconds

2

More visuals – less text

3

Virtual Meeting Design



1

Change slides every 30-120 seconds

2

More visuals – less text

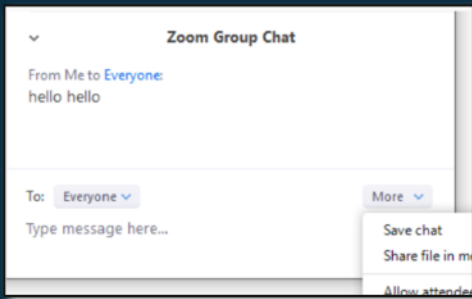
3

Make it interactive

Use Virtual Tools

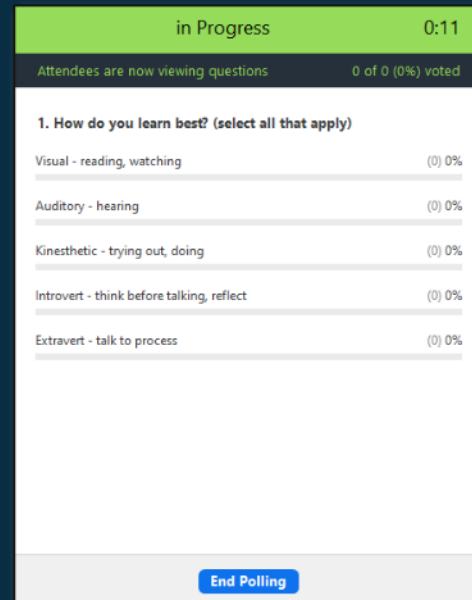
Planning Tips for Engagement

CHAT



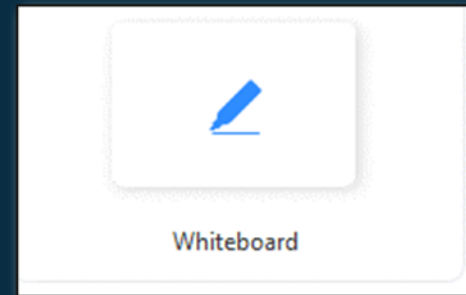
- Promote balanced participation
- See questions
- Plan for how to monitor and respond

POLLS



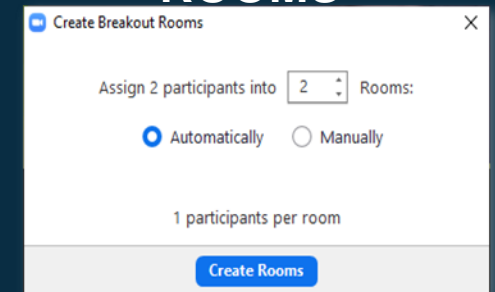
- Shows anonymous info
- Prepare in advance
- Plan how to respond, based on poll results

WHITE BOARDS



- Virtual brainstorming tool
- Use PPT to simulate a whiteboard
- Use and explain annotation tools

BREAKOUT ROOMS



- Small group discussions
- Group size vs # of groups
- Ensure time for debrief

Virtual Facilitation Tips

How will you apply
Engage Everyone tips
in your virtual meetings?

- Hook Their Attention
- Maximize Team Time
- Design Meetings for the Virtual Environment

What questions do you have?



Let's Get the Blood Flowing!



Create Commitment

1

Build the Foundation

2

Use Individual Tactics

3

Use Group Tactics



Commitment Strategies

Build the Foundation



- Trust
- Clarity
- Buy-in

Individual Commitment Tactics



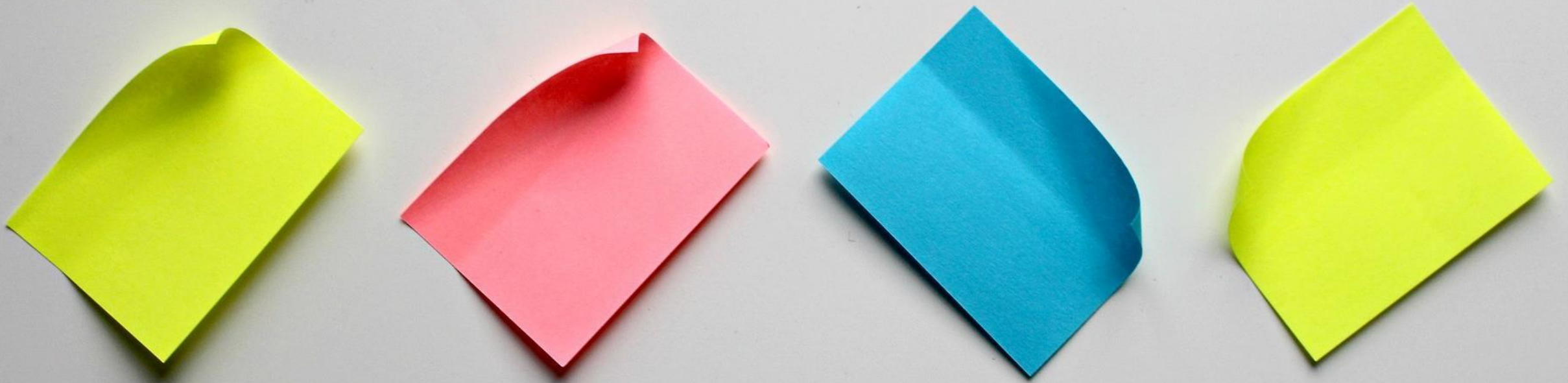
- Individual Reflection
- Sharing Goals

Group Commitment Tactics



- Multi-voting
- Fist to 5
- Effort Impact Grid
- Documenting Decisions & Action Items

Use Virtual Post-it Notes



How can we make our agency easier for people to access services?

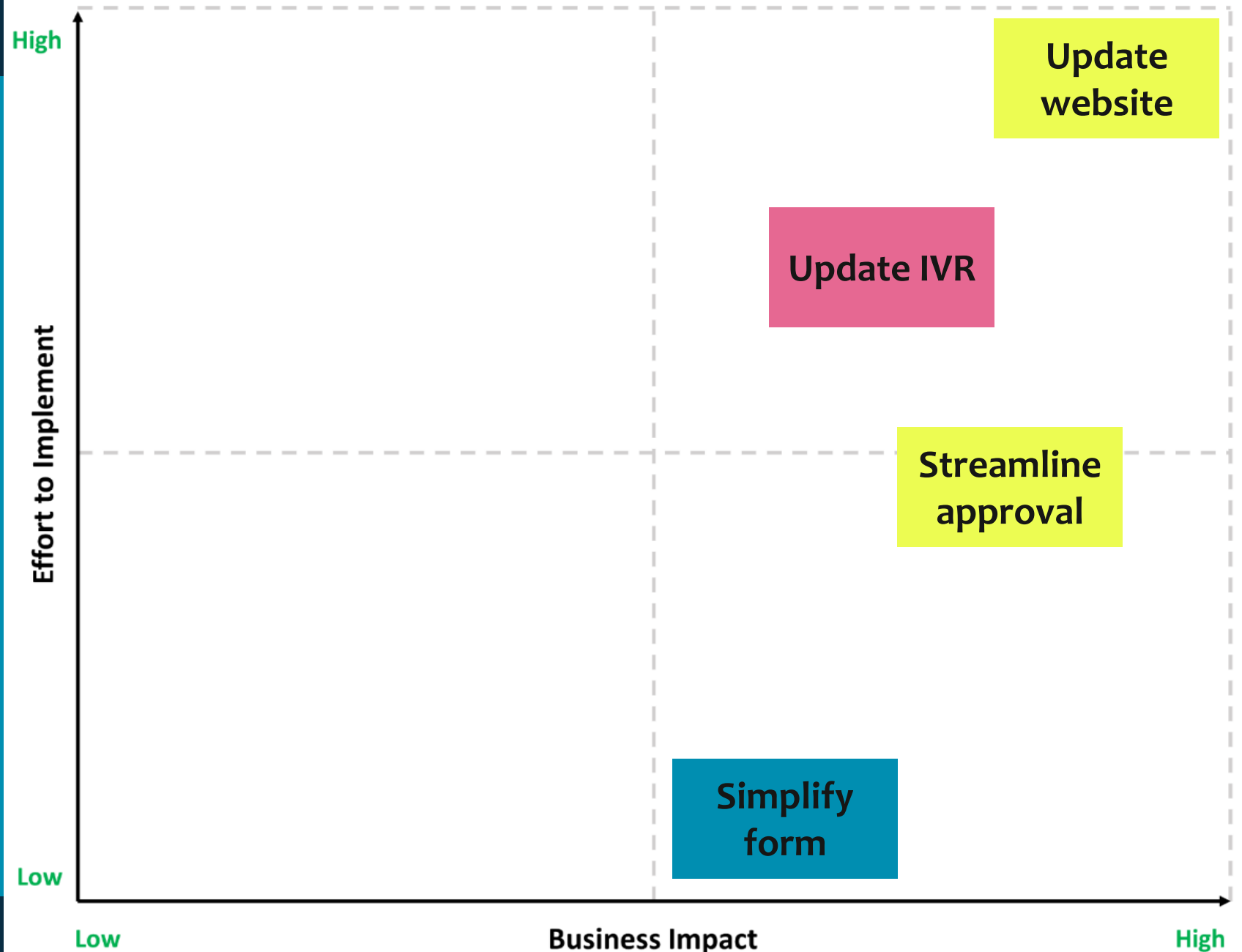
Update website

Update IVR phone tree

Simplify a form

Streamline approval process

Effort-Impact Grid



Virtual Facilitation Tips

How will you apply
Create Commitment
tips in your virtual
meetings?

- Build the Foundation
- Use Individual Tactics
- Use Group Tactics

What is the one idea you are most excited to apply?



Waterfall Chat

1. Ask a question
2. Type response in Chat, but do **NOT** press <enter>
3. <Enter> all at once. Read the “waterfall” of responses
4. Think about what everyone said

What is the one idea you are most excited to apply?





<https://www.surveymonkey.com/r/RW-VirtualFac>



Virtual Facilitation

For Lean Practitioners



It only takes a SEC!



Christine Frishholz

cfrishholz@theciceronegroup.com

