# Learning About Virtual Facilitation

**Discussion created by Wayne Nelson on 2/4/2010 7:26 PM**

[Wayne Nelson](#)

**Posted by Wayne Nelson** on 2/4/2010 7:26 PM

This discussion is a collection of what we are learning and discovering about virtual ToP facilitation. Here are a few questions to start the thinking. We are, I believe, looking for mostly very practical insights that make our sessions really work well.

An example - Our discovery that a "sandbox" introduction to the technology with no project content work involved is a very valuable way to save time, build confidence and reduce tech confusion. It is becoming an essential part of our practice.

- - What would you tell people they should always do when facilitating in a virtual situation?

- - What is the best tip you have ever heard?

- - What are the best tips for engaging people?

- - What practices lead to high quality work and results?

- - What are the first things our ToP colleagues need to learn?

*Last edited by [Wayne Nelson](#) on 2/4/2010 9:06 PM*

[Jean Watts](#)

**Posted by Jean Watts** on 2/4/2010 9:42 PM

After only two real virtual meetings here is my limited observation to date: 1) The upfront preparation (as in face to face facilitation) makes all the difference and you can count on it to get results.

2) Calling on people directly (unlike what I usually do in f2f facilitation) works well in virtual facilitation.

3) Using Caps and other ways to distinguish the question from the brainstorm data is particularly helpful when facilitating online without color markers or color paper.

4) Hearing someone speak their insight in addition to writing and sending it - allows for more depth in the dialogue and thus more engagement.

5) When answering more than one question at once (or having three possible questions to respond to at once) does not cultivate 'collective consciousness' like having the group respond to one question at a time (and in the sequence of ORID).

6) The imaginal questions or questions that require the use of one's imagination to answer need a lot of upfront thinking through to accomplish their intent of opening up the right brain when online.  Think I might only do them verbally and not have people write their answers??????

[Ester Mae Cox](#)

**Posted by** **Ester Mae Cox** on 2/5/2010 8:18 AM

Jean... These are fabulous insights.... You're on the way to virtual facilitation...

I encourage you to take up one of the trial vendor offers, and design a session of work with a colleague or two (someone safe and friendly, as you learn - like TTN members)...

I think Sunny has introduced you to Ellumniate that offers the free room for 3 people.... so that's a great place to start...

Adobe Acrobat Connect Pro has a free trial month - I suggest you pick a month when you have time to learn and study - their tutorials are very good and you can self-teach (or self-learn - whichever way you think about it)... I am not remembering, but think it will allow you up to 50 in a group - anyway, it's a more substantial number

Others that are interesting include GoToMeeting, and WebEx - both of whom also have free trial period for substantial number of participants....

 A bit of note about VoIP and Adobe Connect Pro.... Sheila and I are very aware that people want to use this...... and we do too..... The beginning "hitch" is that it will work well (without echos and static and feedback from each other's computers) IF we ALL get USB connected headsets.... We have found that people do not abide by our request for this (and we aren't like "the boss" where we can hold people accountable).... people substitute everything else, or do nothing... and it's all those whose computers send the echos and feedback to the rest of us on USB connected headsets (which I'm convinced makes it worse, since we've set ourselves up in a noise-canceling environment with a

headset). I'm still trying to figure out in my head a way to get people to conform - follow the technical rules - maybe you have a suggestion?

I found very adequate headphones (USB connect) for $20....... Of course, you can spend oodles for them - all the way up to Bose quality!

Meanwhile, we use MaestroConference as it has capacity to have breakout rooms and the sound quality is generally very good.

Last night there were 2 people who managed to be on BOTH VoIP and MaestroConference at the same time, and I chose not to stop and gently tell them to shut one off - as there didn't seem to be substantial issues with people hearing (or at least no one reported that - either verbally or in chat, or dropped off the call mid-meeting) - Sheila and I are still working on getting VoIP up and working well - Until it works well, we're much better off having good audio quality in another way.

[Wayne Nelson](#)

**Posted by Wayne Nelson** on 2/5/2010 9:04 AM

I bought a USB headset and it is really great.  Looks like you're a pilot or something, but that's cool too.

Ester Mae - can you please tell us the make and model of yours and where to get it?  $20 is a very good price. I paid twice that. Mine is Logitech. They seem to have quite reliable gear.  John Miller got one from Skype for about $30. These units will get cheaper, but to me, the best price when you need it is the best price,

I've learned that if I am to get into this realm, it means making as investment. ICA Associates bought an Elluminate license. 10 facilitators - $3000. We've paid for it through client work already. Our Zoomerang license pays its way all the time. This stuff has to fit into the real economy and we need to operate in that real economy.

\V

[Ester Mae Cox](#)

**Posted by Ester Mae Cox** on 2/5/2010 9:14 AM

Wayne (and others)....

You're right about having to make an investment... And after trying out several tools and technologies in 2009, I made a leap with my individual license for Adobe Connect Pro - And I have loved learning to use it...and LOVE it's adaptability.... I mostly have to think in new ways to make what I want to do happen with the technology...

The $20 headset is brand DYNEX - and came from Best Buy - And I happen to still have the cardboard that tells me its DNCT4 "Direct Noise Canceling Microphone Technology".  My only dislike of it is that it has a single earpiece - I find I get more balanced sound from double headset (probably related to old ears)... I have adjusted though and find that the more I use it, the less frustrating that fact has been...

EMC

[Jo Nelson](#)

Posted by __Jo Nelson__ on 2/5/2010 5:58 PM

I've learned that you can't assume who will be a fast learner of technology.  I just worked with a lawyer who simply could not figure out how to use the text tool on the whiteboard in Elluminate, despite at least 15 different sets of instructions.  I concur with Wayne that pre-meeting training is essential -- I call it a "sandbox" so that people are given permission to play.

In Elluminate, you can upload templates in PowerPoint, and write right over them, like writing in a workbook. Creating specific versions that go right to the edge of the page and have instructions in small letters makes for more space to write.  Print versions often have large margins that use valuable whiteboard space.

Use video only if everyone has a webcam and there is huge bandwidth available.

Do a dry run with your meeting after you design and set it up to flush out hidden gaps or difficulties.

[Sheila LeGeros](#)

Posted by __Sheila LeGeros__ on 2/7/2010 10:24 AM

Thinking about Jo's previous comment, I've found it's really helpful to use a share screen technology when a participant is struggling with the technology learning curve.  By asking the participant to share his/her screen with me, I am able to save a lot of time and frustration for both of us.  It's been very useful on several occasions.

Sheila LeGeros

Thanks Wayne for starting this valuable conversation.  Here are the basics of good virtual facilitation that I have learned through trial and error over the last 18 months.

1) Always use a co-facilitator and establish a clear division of roles.  The lead facilitator facilitates the meeting.  The technologist follows what the lead facilitator says.  The technologist manages the technology, on-boards participants and assists them with any technical challenges during the meeting, tracks the script and offers helpful reminders to the lead facilitator, tracks timing and informs the lead facilitator if falling behind, and takes notes during the meeting. Alternatively, there can be a third facilitator who acts as a scribe.

2) The technologist needs to know the tools inside and out. The lead facilitator needs to know enough about the technology to know its capabilities, be familiar with where to find things, how each tool works from the participants' perspective (which is often different from the facilitator's perspective), how transitions are made, and how to operate each of the tools from a presenter's perspective.

3) Write a detailed script with rational aim, experiential aim, set-up information (links, passwords, PINs, phone numbers, meeting time), participant information (names, who's coming late, who plans not to attend -- have PINs ready for them because sometimes they do attend), agenda elements, timing of each element, role of each facilitator, tools to be used for each element.

4) Rehearse the script at least once.  Twice is better.

5) Be very centered at the start of, and throughout the meeting.  Go through a pre-meeting ritual 30 minutes in advance of the session so you can calmly onboard participants.

6) Send participants a meeting invitation that contains all meeting login details (phone number, link, PINs, passwords, procedures).  Use Timebridge because it will automatically populate the login information in both Outlook and iCal calendars (if participants synchronize their calendars with Timebridge).  Configure Timebridge to

send a meeting reminder a day before the meeting.  If participants can't find their login procedures, direct them to the meeting notice in their calendar.  (It's very challenging for participants to find login information in an email due to the volume of emails we receive on a daily basis.)

7) A spirit of playfulness, camaraderie, trust and respect goes a long way between co-facilitators.  It helps get through any glitches that are inevitable along the way.

If you have any questions about these tips, I would be happy to share the experiences I had which led me to these conclusions.

I look forward to hearing what others have learned.

Best wishes on your virtual facilitation journey,

Sheila

[Wayne Nelson](#)

Posted by **Wayne Nelson** on 2/5/2010 10:27 AM

Here's another thing I've learned.

**To make a paragraph, use 2 hard returns.**  One makes it look OK in Huddle itself, but when it sends the email message, they merge together - making it hard to read.

This is one of those weird things that happen with some online editors. Some work right and some don't. You have to fool it around with these things to make things look like you want them to look. In this world, presentation is pretty important, because it often makes the difference between some reading what you've written and just passing it by.

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[Ester Mae Cox](#)

Posted by **Ester Mae Cox** on 2/5/2010 10:54 AM

Wayne
Appreciate that hint.... I hadn't figured that out yet.... and Yes, I agree... each one of these little tools has its very own special "personality"...

Of course, the one I'd design would be perfect!  ☺
Ester Mae

**Posted by Ethan Mings** on 2/8/2010 6:02 AM

- - What would you tell people they should always do when facilitating in a virtual situation?

Stick with one technology when conducting a Virtual Session.  For example, when using a live workspace on the net, also use the VoIP connection.  Don't mix the technologies (e.g., conference call and Live session).  That creates one more level of confusion for participants.

- - What is the best tip you have ever heard?

When using a camera with a built in Microphone, put the speakers on the floor and not on the desktop.  This will help cut down on speaker feedback and echo.

- - What are the best tips for engaging people?

Ask people about their phone system.  If they are using a VoIP phone at the same time as a VoIP software session (e.g. Citrix) that will lead to lag and connectivity problems.

- - What practices lead to high quality work and results?

Practice with the technology in advance of the session and given participants amble opportunities to practice with the technology. Set objectives for the practice session.

- - What are the first things our ToP colleagues need to learn?

I would encourage people to spend some time with their machines learning how they work, how to master at least three different pieces of virtual software and learn how to crash the software and then recover.

In crashing software, one can really learn how the software works.

Finally, carry a router with you, I have found this a real time saver when I'm doing sessions from a remote location.

Jerry

**Posted by Sheila LeGeros** on 3/19/2010 1:28 PM

Today, I learned that customers don't really understand what they want when it comes to doing things in the virtual world, because they don't know what is out there, they don't what is possible, or they don't know what they really need.  I've been working with a prospective nonprofit client in Washington, DC for the last 5 months, trying to help them find a way to convert their normally two-day face-to-face annual meeting to a 60-minute virtual meeting.  They wanted to do this because the face-to-face meeting costs $500,000, and they don't have the money for it due to the recession.  I introduced them to a range of tools, and although they really liked them, none of them seemed to satisfy, and they did not let me in on the reason why until today.

Today, I learned they went with the provider called "LiveCast" due to a quirk in their bylaws (which they had not revealed to me) that states the officers must be physically present in the same place during the annual meeting.  LiveCast has a studio in DC where the officers can go to be filmed and broadcast live over the internet.  This technology was used to stream the Vancouver Winter Olympics over cell phones.  Here is the link to LiveCast:

**http://www.livecast.com/corporate/index.html**

Their bylaws also prevent them from voting live over a webcast, so they are going to have to do paper balloting -- an outdated and costly system -- even though I found some very good virtual solutions.

This whole incident caused them to realize how outdated their bylaws are, and they're going to work on updating them in the coming year.

In working with another nonprofit recently in Texas, I learned that the laws of the state of Texas prohibit nonprofits from voting electronically in annual meetings.  I am helping them convert their F2F annual meeting to a virtual meeting, but they will also do voting by paper ballot.

So, a key learning for me is that converting annual meetings to virtual meetings has some tricky legal issues.  I think I would ask for a copy of the bylaws right up front next time, and save myself a whole bunch of time.

Has anybody had similar experiences in conducting virtual annual meetings?

Sheila

**Posted by <u>Ethan Mings</u>** on 2/8/2010 6:02 AM

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Jerry

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[Jo Nelson](#)

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**Posted by <u>Jo Nelson</u>** on 4/6/2010 10:26 AM

A new source of pointers and tips:

http://www.learncentral.org/userprofile/blog/89/50872

The comments on this blog are by someone who works with Elluminate.  They are good introductory points for a client considering the advantages of a virtual meeting.  A few of the points are also helpful for the facilitator.