

Getting Real Results from Virtual Workshops

The current global situation has nearly everyone working from home, from those who've been doing it for years to those who are brand new to the concept. As a global strategic consulting firm with nine offices and clients all over the world, Global Prairie has been successfully collaborating in the virtual world since we first opened our doors in 2008. In this primer on **Virtual Workshops**, we've gathered our own time-tested experience as well as the latest thinking from other thought leaders in this space to set anyone up for success – and yes, virtual workshops can be successful! For more help planning and facilitating your own virtual workshops, contact us at info@globalprairie.com.

Setting the Stage for Success: Designing a Virtual Session

→ **Seek the same outcome, not the same experience.**

You can accomplish the same goals with virtual sessions, but the way you get there will not look the same. Focus on the bigger picture of what needs to be accomplished during the meeting – rather than the method originally planned to accomplish it – and then work backward from there. For example, if you were hoping to have people break out into smaller teams to do some focused ideating and then report back to the larger group, how can you achieve those same benefits (cross-team collaboration, active participation from quieter participants) in a virtual setting? There are abundant digital tools and platforms that will allow you to reach your same original goal if you are willing to think differently about the way to get there.

→ **Break the agenda into shorter modules with assignments in between.**

Human attention spans have significantly decreased over time, and ongoing distractions of incoming emails, pets, spouses and children in the current work-from-home environment only add to the challenge. While holding everyone in an all-day conference room might work in-person, it certainly won't work remotely. Instead, we recommend an agile approach to virtual workshopping: breaking the complete agenda into a series of short sprints that allow participants to come together for contained periods of time to connect and collaborate before being briefed on their next task and allowed to log off to work individually. Not only does this break up the time, it allows participants to handle outside distractions without disengaging during important moments. The time in-between the group sessions can vary from a few hours to a day, or longer. A variety



of factors such as the workloads participants are handling, the intensity of the assignments they are being given, and the variety of time zones involved in the session should be considered. The most important factor to keep in mind is the group's ability to keep and build momentum throughout the process, without getting overwhelmed by the time commitment and thus, disengaging.

→ **Leverage pre-meeting homework.**

Shorter group sessions mean less time spent in collective contemplation. In order to spur thinking ahead of time and hit the ground running, we suggest providing homework to participants prior to the meeting. Assignments can be as simple as relevant pre-reads with a few thought provoking questions, or more complex such as reviewing detailed briefing information or asking them to brainstorm on specific topics ahead of time. This allows participants to show up not only prepared, but already actively engaged in the topic.

→ **Limit open-ended questions.**

When teams are new to collaborating virtually, it can take a while for participants to feel comfortable participating in this format. To avoid the dreaded moments of complete silence during a group session, we suggest facilitators avoid throwing out open-ended questions to the whole group. Instead, ensure everyone is able to participate by calling on specific attendees and asking for the opinion of various participants throughout the process – this encourages quieter team members into a more collaborative space, making it easier for them to continue jumping in and contributing in the future.

→ **Use virtual engagement tools like polling, chatting, hand-raising and breakout groups.**

Without the ability to physically interact it can be helpful to utilize digital features to drive engagement and keep the interaction fresh. Many collaborative platforms have built-in tools like group polling to easily determine where participants stand on specific questions or issues. Other useful features include virtual hand-raising which allows everyone to quickly participate, and break-out rooms where participants can gather in smaller, connected spaces for group brainstorming before bringing the entire group back together again. Some of our favorite services that include such features are Webex Teams, Zoom, and Google Platforms. Additional tools for collaboration in other formats like virtual whiteboarding and post-it notes can be found from tools such as Miro, Stormboard, NoteApp, Scribble and Yabba.

→ **Always finish strong.**

With everyone working remotely and jumping from one call to the next, it's more important than ever to document and distribute a recap report of the outcomes of the session and any follow up action items for the team. We recommend designating an individual to join the call specifically to fill this need, someone who is not an active participant but rather a full-time listener and note-taker.

Tech 101: Ensure Smooth Execution

→ **Distribute the necessary technology and tools ahead of time.**

Transitioning to virtual workshops might require your team to access and use new technology. It may also mean participants need to prepare materials for themselves – printing or downloading instructional materials or having specific supplies handy. Setting expectations ahead of the meeting and providing plenty of time for attendees to prepare for everything they will need in advance will reduce the risk of losing time and focus in the session itself.



→ **Hold a pre-check tech meeting, or plan time at the top to trouble-shoot tech issues.**

Even on its best day, technology can be finicky; with the current strain on systems you can count on a few hiccups. Make sure to account for the necessary technology trouble-shooting time. While it is easy to block the first ten to fifteen minutes of the agenda to account for such issues, when possible we recommend a brief “pre-check tech” meeting ahead of time – which can be done as a group or individually – to give everyone the opportunity to test their capabilities and ease any tech anxiety they might be facing. Most importantly, it ensures you start the actual workshop on a high note, with everyone engaged, focused, and ready to go.

Rules of Engagement

→ **Stick to the schedule.**

In virtual meetings it is even more important to set timing expectations and commit to keeping them. If you reach a point where you are going to run long, we suggest asking the group to vote on how to proceed: either tabling the current topic for a later time, or prioritizing it in the moment by removing a later topic from the agenda (which can be selected by the workshop owner). Gaining participants’ ownership in the decision ensures the necessary buy-in to keep the group engaged in the rest of the conversation.

→ **Level the playing field: everyone is virtual.**

Virtual sessions work best when everyone is participating in the same format. We’ve all experienced the feeling of being the only person who is calling in to a meeting while the rest of the group sits together; it can be difficult to fully engage. In the event that some or most of your participants are not able to meet in person, it’s a good idea to have all participants join virtually. This could mean some people taking calls at their desks or in separate rooms – while it may seem trivial, making this small decision can change the dynamic of an entire session.

→ **Smile for the camera!**

While being on video won’t fully replicate the feeling of being in-person, it comes much closer than simply calling in, as it provides everyone the ability to connect and collaborate using as many senses as possible. Some people are auditory learners, others are visual - seeing their collaborators on camera helps them better comprehend and engage in the discussion. Being on camera also adds accountability for participants to be focused and engaged for the whole session, as it’s much easier to tell when they are not.

→ **Use the mute button sparingly.**

The mute option can be a helpful tool for virtual meetings where information is being disseminated to a large group from only a few key speakers. But in a more interactive session it causes lags in the conversation (“I forgot I was on mute”) and missed opportunities to build off each other. While we don’t discourage use of the mute button completely, we do recommend leaving it off in the collaborative portions of the session when the ability to build on each other and keep momentum and energy in the conversation is critical.