



Virtual Facilitation Skills

Tracy Stewart Terry
CDM

© 2009 Camp Dresser & McKee Inc. All rights reserved. No part of this course may be reproduced or stored in any form of retrieval system, or transmitted in any form or by any electronic, mechanical, photographic, or other means without the prior written permission of Camp Dresser & McKee Inc. ("CDM"). This course is confidential and proprietary to CDM.

Introductions

- **Name**
- **Organization & Role**
- **Expectations?**

Agenda

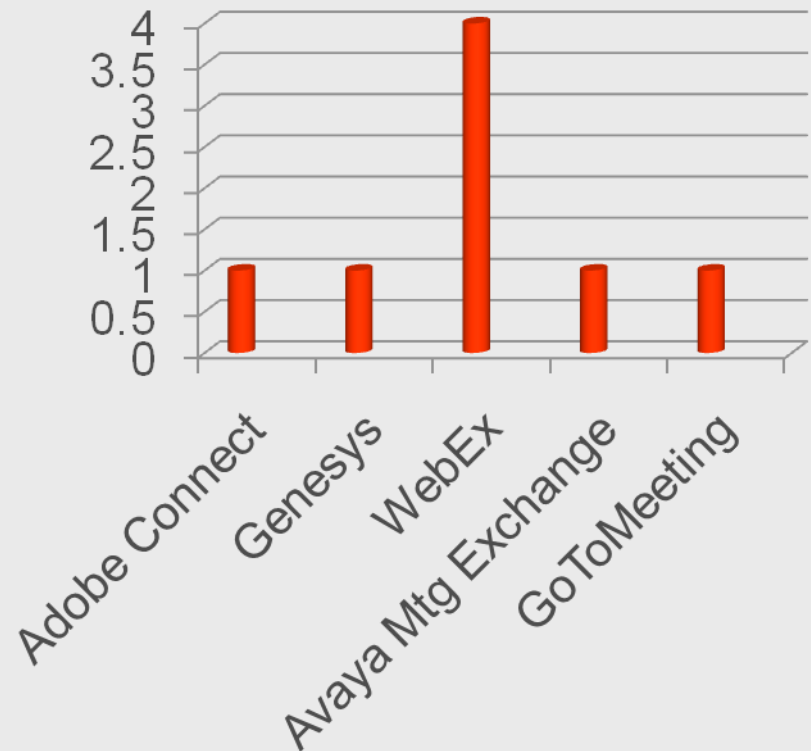
- **The differences between a face-to-face session and a virtual session**
- **Skills needed to be a successful virtual facilitator/meeting manager**
- **Engagement opportunities**
- **Best practices**
- **Questions**

Virtual Meetings & Training

Barriers

- Technology
- Making presentations interesting
- Participant Interaction
- Avoiding participant multi-tasking
- Time zone differences

Tools



Traditional Sessions vs. Virtual Sessions

CDM University

Group Discussion:

How is a virtual session different than a face-to-face meeting?

What are some challenges of facilitating virtual sessions?

Differences in facilitating in the traditional environment vs. the online environment

Traditional Environment	Virtual Environment	Actions
You can see the participants (multiple senses)	Can only hear them	Need to compensate for loss of visual content by using a variety of engagement techniques and interactions.
Use visual cues to gauge understanding (eye contact; body language)	Have to address understanding in other ways	
Can tell if a participant is there, both physically and mentally, because you see them	Harder to tell if participant is engaged	
Participants are familiar with the learning context	Participants may not be familiar with the learning context.	Provide resources to get participants up to speed and pace content to allow for people to respond within the limitations of the technology

Skills needed to be an effective virtual facilitator

	Presentation	Facilitation
Purpose	<ul style="list-style-type: none"> ▪ Inform ▪ Instruct ▪ Motivate ▪ Persuade 	<ul style="list-style-type: none"> ▪ Lead a or moderate a group a discussion ▪ Accomplish a task or develop an out come ▪ Build a consensus
Your Role	<ul style="list-style-type: none"> ▪ Talk, ▪ Explain ▪ Demonstrate 	<ul style="list-style-type: none"> ▪ Interact and encourage participation ▪ Generate discussion and ideas ▪ Problem solve ▪ Manage conflict ▪ Help synthesize information ▪ Keep process on track
Participant Role	<ul style="list-style-type: none"> ▪ Listen ▪ Take notes 	<ul style="list-style-type: none"> ▪ Share ideas ▪ Ask and answer questions ▪ Demonstrate understanding
Success Measures	<ul style="list-style-type: none"> ▪ Meeting the session objectives ▪ Display all the content ▪ Finish on time 	<ul style="list-style-type: none"> ▪ Meeting the session objectives ▪ Comprehension ▪ Change in behavior ▪ Participants think about how they will apply what they've learned

Group Discussion:

**Tell us about a good virtual facilitator.
What did he/she do to overcome
challenges of a virtual meeting**

Group Discussion:

Tell us about a less successful virtual facilitator. What were the impacts of the facilitator's actions?

Facilitation is...

- **Participant centered approach to leading**
- **“Guide on the Side” not “Sage on the Stage”**
- **You are not expected to know all the answers but rather guide the group towards their own development of the answers**

Skills or traits an online facilitator needs to possess to be successful



Engaging the Virtual Audience

CDM University

Techniques for Facilitating Discussion

- Asking questions
- Handling responses
- Engagement techniques
- Participant cues
- Language

Questioning and Listening

- **Listening**
- **Question Types**
- **Redirected Questions**

Listening

- **Put aside distracting thoughts. Don't mentally prepare a rebuttal**
- **Defer judgment- Interrupting is a waste of time. It frustrates the speaker and limits full understanding of the message**
- **Avoid being distracted by environmental factors**
- **Encourage the speaker to continue with small verbal comments like yes, and uh huh**
- **Reflect what has been said by paraphrasing. "What I'm hearing is..." and "Sounds like you are saying..." are great ways to reflect back**
- **Must be comfortable with silence**

Types of Questions

Type	Example	Used when you want to
Closed	<ul style="list-style-type: none">▪ Has anyone ever participated in a PQM session?▪ Requires a one-word answer.▪ Closes off discussion.▪ Begins with words like is, can, how many, does.	<ul style="list-style-type: none">▪ To guide or control discussion.▪ To get participant feedback
Open	<ul style="list-style-type: none">▪ Can someone describe their experience in a PQM session?▪ Requires more than a one- word answer.▪ Begins with words like what, how, when or why.	<ul style="list-style-type: none">▪ To stimulate thinking.▪ To create involvement▪ To elicit discussion.

Engagement Techniques

- Breakout groups
- Individual brainstorm
- Direct questioning
- Tapping a known expert
- Sharing your own experience
- Use of technology (whiteboards, text slides, polling slides)
- Use of language
- Assigning tasks (time keeper, reporter, team leader, etc...)

Language

- **Pace**
- **Volume**
- **Language (acronyms)**
- **Don't Emphasize the Technology**
- **Don't just read the slides**
- **Try to be funny (within reason)**
- **Ask Questions**

Tips for Keeping Attention

- Be unpredictable
- Make them do something
- Interaction every 3-5 minutes
- Use names and call on people

Participant Cues

- **Feedback**
- **Mood Indicators (if applicable)**
- **Response time**
- **Your Feeling**

Other Best Practices/Samples

Have you

- Downloaded a copy of the Participant Guide and have it with you? If you do not have a copy please download it from the handouts.



(button top right hand corner)

- Turned off your e-mail notification and closed other computer applications?
- Notified others that you are participating in a course and are not to be disturbed?

CDMU REGISTRATION POLICY

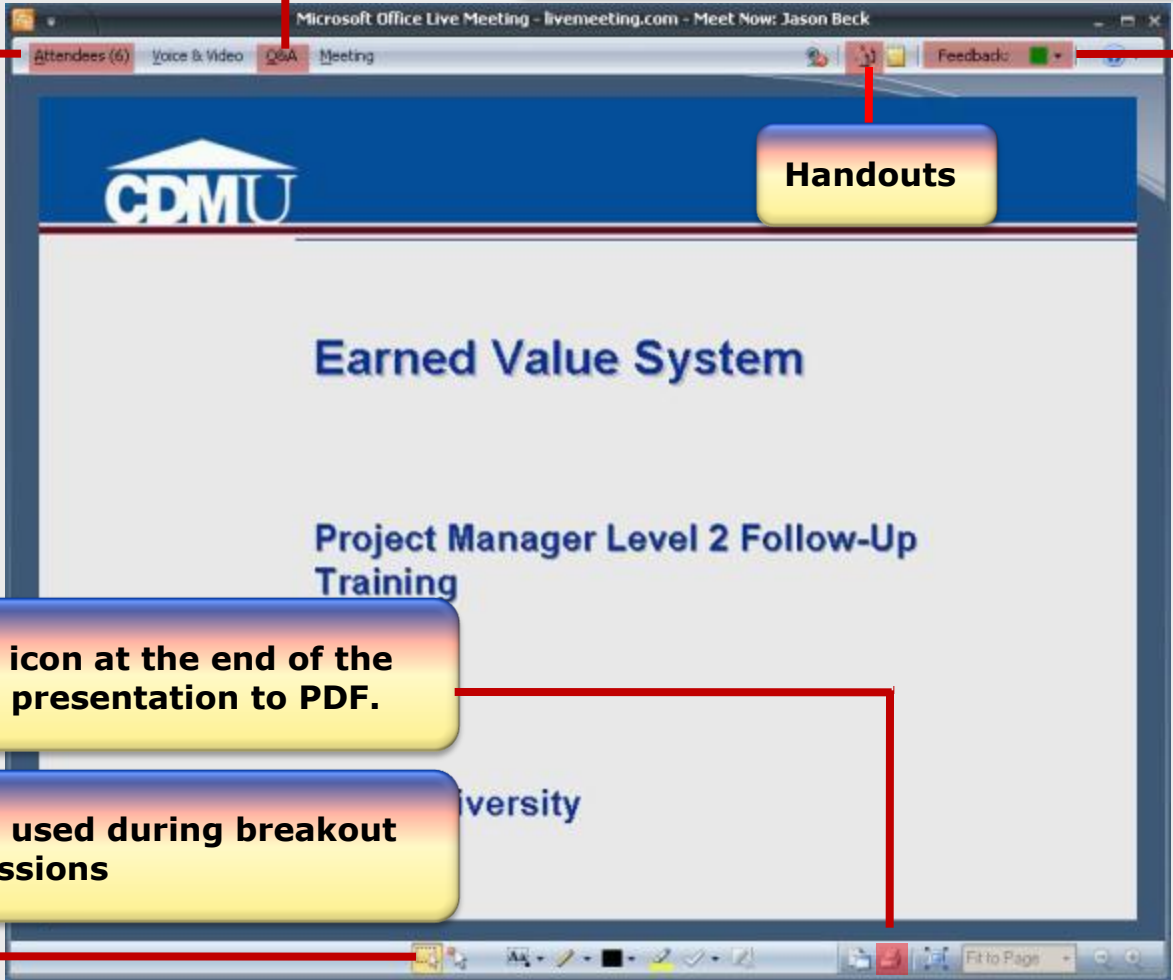
You will not receive credit for attending this session if you are not registered in this course thru CDMU's Learning Management System (LMS).

If you are experiencing any technical difficulties press *0 for assistance from a Verizon representative.

The Course Environment

The Questions and Answers panel allows you to ask a question at any time in the course

Attendance panel



Handouts

The Feedback indicators allow you to quickly provide feedback by clicking one of the colored options under the Feedback drop down menu.

Click on the printer icon at the end of the course to print the presentation to PDF.

Annotation tools – used during breakout sessions

Other Questions?

- Please feel free to contact me with any follow up questions

terryts@cdm.com

(617) 452-6428

Thank you!