

# **A GUIDE TO LEADING TEAMS & FACILITATING INSIDE...**

**Virtual Meeting  
platforms**



I think we all can agree that conducting meetings and workshops in-person is most desired, but as we find ourselves having to do more meetings virtually there is a difference and learning curve when it comes to facilitating in online environments. Your goal should be to try and replicate your live environment. It's not easy and comes with more planning than you think. This is not a tech review but rather bits of advice to help you have a smooth online session with your teams when facilitating inside online platforms such as AdobeConnect, Zoom, WebEx, or any other platform.

I truly hope you find this helpful! Cheers!

~Rob Fonte

When facilitating in-person we can generally go around the room and seek volunteers to share their thoughts or do a “teach-back”. In the online environment, one suggestion is ‘voluntell’ someone to present back. This sets expectations that everyone will most likely get involved, keeps learners engaged, and helps move the needle along when doing workshops online.



**VOLUNTEER  
VS.  
VOLUNTOLD**



# BREAKOUT ROOMS



Just as you would have breakout rooms in live workshops or meetings, you can also do this online. It also allows a small, more intimate session where teams can work together, and everyone gets a chance to talk. You'll also want to have the following ready if you are to conduct breakout sessions:

Pick a scribe - If your breakout includes the use of a notepad or virtual flipchart, you'll want to have someone typing the key points, takeaways, answers to activities, etc.

**SCRIBE**

Pick a presenter - If there is a report back or a teach-back, be sure to pick a presenter at the start of the session.

**PRESENT**

Flipcharting - Just as you would use a flipchart in a live session, you can do this virtually. You can also save the notes and disseminate them after your session.

**FLIPCHART**

Chat box - not everyone will always speak up so utilize the chat box feature to allow for Q&A.

**CHAT**



# ENGAGEMENT ACTIVITIES

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Trivia – e.g., Top 10 list after each break – a great way to keep people engaged with a fun activity throughout the day.

Virtual Happy Hour - whether it's a glass of iced tea or cabernet, a virtual happy hour gives teams the chance to all wind down for a few minutes and just exhale after long days.

Virtual Walk and Talk – you can go for a walk with a colleague while on the phone, indoors or outdoors.

Polling questions - a great tactic to deploy in your sessions. You can get a baseline of knowledge, a feel for sentiment, knowledge checks for information learned, etc.



## VIRTUAL HAPPY HOUR

## POLLING QUESTIONS

## WALK AND TALK





# NEED CONTENT TO MAKE THINGS FUN?



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Topics include:

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- Epic structures
- Mechanical creations
- Outer space
- Video games
- Music
- Movies and television



# WEBCAMS ON!



Insist on having webcams on during the session. Not just for the sake of trying to read the room with facial expressions, but just being able to connect face-to-face with your team puts us all on the same playing field.

## FACILITATOR'S GUIDE

Have one developed for yourself. It should list your talking points for each session, directions for activities, etc., just like you would do for a live session.

Do not underestimate the importance of structure and time. Know exactly when you want to take breaks, conduct Q&A, deploy polling questions, etc.







# CO-FACILITATORS & PROFESSIONAL PRODUCERS

If you have the resources internally, bring along a co-facilitator. This person can help manage the Q&A in the chatbox, tech issues, etc.

There are also many organizations out there that offer the service of having producers join you to help manage the tech aspect of meetings and workshops. If you plan to have large groups online the investment in these organizations brings great ROI. They'll manage moving people around to breakouts, tech issues that may arise, even simple things as helping the conspiracy theorists remove the sticky paper from their webcam.



# ABOUT ROB



Rob Fonte is the founder and President of Sarto Leadership Group, whose reputation has been built on being a transformational leader and inspirational coach with a passion for developing others. Rob's twenty-year career spans across multiple disciplines from leading award-winning sales teams, developing leadership and management training curriculums, and now host of the Leadership Jam Session Podcast.

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