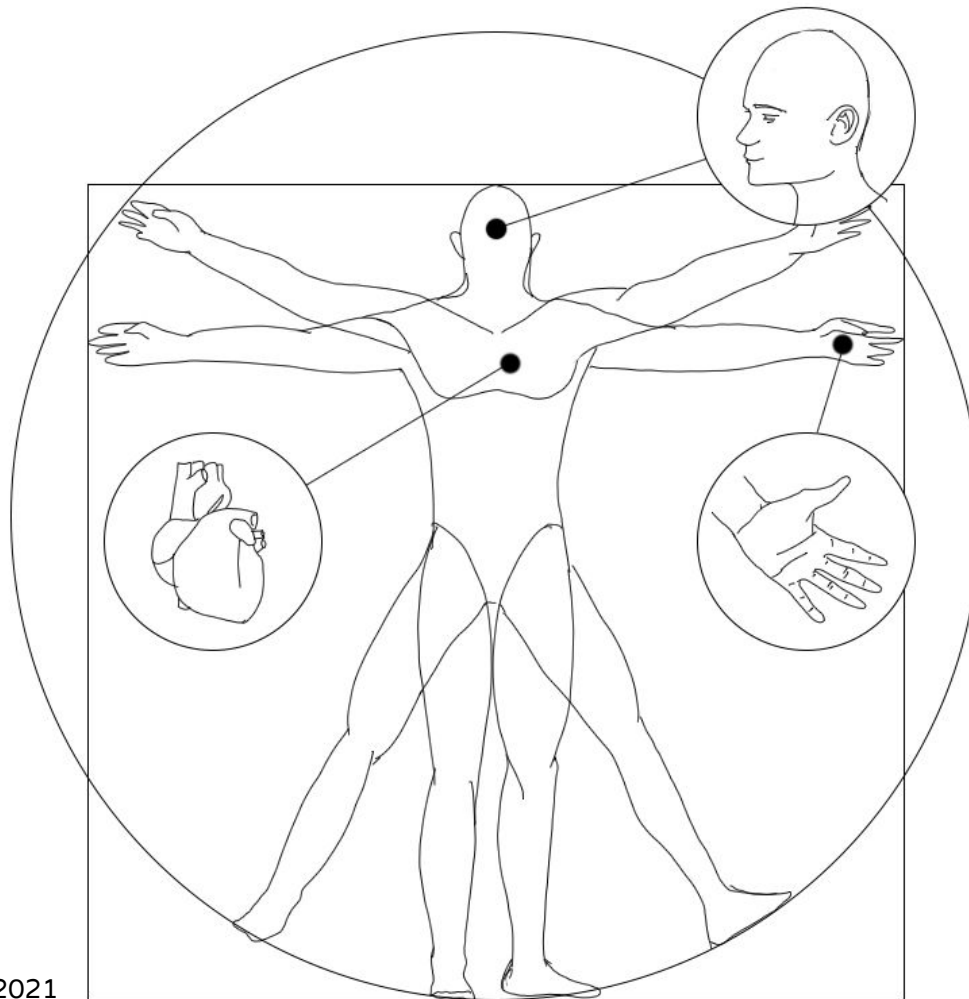


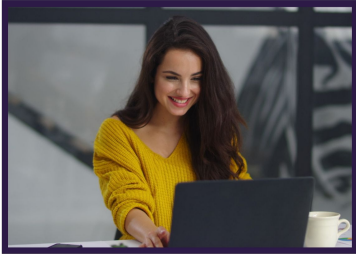
TEN LEADING PRACTICES

for consultants creating engaging online meetings
and workshops





Creating engagement in online meetings is a complex communication challenge that requires us to involve heads, hearts and hands

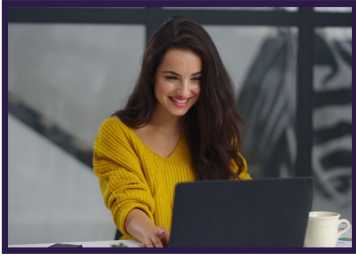


Earn the right to be interesting

1

- Manage your screen real estate and audio
- When people join, do you want them muted, with video on? Gallery or speaker view? Being able to see each other increases the feeling of connection and engagement.
- Faces are most important, don't let screenshare dominate if the intention of the meeting requires interaction.
- Have a co-facilitator who can watch the audience and facilitate their participate. This is how top consultants facilitate - one person delivers, one is watching the crowd, reading the room and prompting when needed.





1

Earn the right to be interesting

- Take care of hygiene factors
- Manage your appearance
- Your clothes set the scene
- Eyes at 2/3rd up the screen is most pleasing on the eye
- Don't hide at the bottom of the screen, it's obvious you didn't dress for the occasion.
- Your background should be relatively uninteresting. It's hard to concentrate on what you're saying when I'm wondering what you got that award for.
- Make enough room on your screen to see gestures
- Two screens at your end if you're managing a large room, giving a webinar or managing more than one tool.
- Minimise potential disruptions
- Mute by default
- Manage your screen real estate and audio





Connect into your client's story

2

- Don't be irrelevant. Be context-relevant.
- Understand what you're going into, how what you're providing is relevant.
- Place this meeting in a 'before and after' journey using a journey map so people can contextualise and understand the significance, and why they need to participate.
- Have individual meetings ahead of time as needed, to establish a relevant context





Plan, plan and plan some more

3

- Don't fail yourself by failing to prepare. 'Prior preparation prevents poor performance.'
- Virtual meetings take a lot of preparation. More thought is involved.
- Use your travel time for planning
- Schedule the meeting well ahead of time, to allow people to prepare
- Be crystal clear on your purpose
- Share the agenda and purpose
- Establish roles ahead of time
- Have a co-facilitator, someone to read the room, take care of the chat and help participants, while you're focusing on content and interaction.
- Have a backup plan for how to reach your co-facilitator
- Test your setup



Limit time and numbers

- Have the right people in the room - people who can meaningfully contribute or make decisions
- Small groups will have greater involvement from each person, it's harder to tune out
- Large groups become a broadcast and people will stay silent. Size matters.
- A few short calls will get more done than one long one. If it's a long meeting, add a break every 5-10 minutes.

4





Frame what matters

5

- Don't let the discussion wander into the swamp of despair.
- Make clear the nature of conversation that will have value in this meeting - the boundaries of the conversation.
- Use models, decisions, outcomes, process descriptions. This could include 'rules of engagement', group rules or guideposts. Is it ok for people to contribute anytime? Or is this an update from you? If there is a decision, what is required to make it? Input? Discussion? Silence? From whom? When?
- For example, I recently met with a group of executives and their CEO. We had half an hour to achieve a decision about their workplace strategy. I told them I would cover the issues for 15 minutes, then take ten minutes to go around the room, left to right, to get each person's input. We would skip the CEO and come back to him for a final decision. We got a clear decision, and eight weeks later, it had still stuck. A well-managed meeting works wonders.



Frame what matters

5

- Don't assume people know how to navigate all the tools
- Give clear instructions on navigating the platform and how you're anticipating using it. This sets an expectation there will be some participation, so people can prepare.
- Set Zoom meeting settings so that people enter on Gallery view
- Tell them which screen 'view' is best for the meeting today - e.g. Gallery or Speaker





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Be multidimensional

- Don't let the limitations of the tiny black box on your screen cramp your style.
- Instead, exist in the time-space continuum. Make the most of 2D but also take your meeting all the way through to 4D
- 2D - Use visuals to both anchor and expand the conversation.
 - Interaction with images and graphics you provide
- 3D - Use physical objects together to add another dimension
 - CCS cards elevate the conversation - hard copies or app
 - Printed booklets, cards etc.
 - Bring in objects
- 4D - Establish a journey that builds, delivers and then resolves
 - Survey ahead of time
 - A post-meeting participation opportunity - a shared group on LinkedIn
 - Social wrap around - opportunities to meet in future

- *Hand movements*
- *Poll*
- *Writing down actions*
- *Talk about yourselves*
- *Engage in the chat*
- *Annotate*
- *Invite questions*
- *2D - Interaction with images*
- *3D - Using an object*
- *4D - Before and after experiences*
- *Breakout rooms*



Create multiple points of entry

- Don't make it hard for people to engage. Make it easy.
- Be 'multiple', not singular about the way you can get interaction and engagement. Here is a list of interaction opportunities you could use:
 - Hand movements
 - Talk about themselves
 - Engage in the chat
 - Invite questions
 - Annotate
 - Interaction with images
 - Text annotation
 - Writing down an action
 - Poll
 - 3D participation
 - 4D participation
 - Breakout rooms
 - Mentimeter, Hoppin or Demio



- *Hand movements*
- *Poll*
- *Writing down actions*
- *Talk about yourselves*
- *Engage in the chat*
- *Annotate*
- *Invite questions*
- *2D - Interaction with images*
- *3D - Using an object*
- *4D - Before and after experiences*
- *Breakout rooms*

7

Create multiple points of entry

- Don't go for more than a few minutes without them doing something. You might be the expert, but you will have more influence if you get more engagement. "Tell me and I forget, teach me and I may remember, involve me and I learn." – Benjamin Franklin
- Breakout rooms - do them early and often, every session - 1:1's, where people can really say what they think about something, they will be more engaged if they get to speak early.

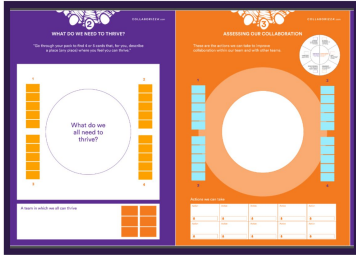




Get people talking

8

- If someone is talking, they're engaged. If they're talking about something they care about, they're more engaged. If they're talking about something close to home and personal, even moreso. And if they're talking about themselves, you have them at their highest level of engagement.
- Spend longer than you want to on the introductions. I've seen consultants spend 30% of the meeting time with introductions and it has worked a charm.
- Give people roles - facilitator, note taker, timekeeper, even social process monitor
- Ask open-ended questions, instead of telling straight away why you think something is important.
- Ask specifically for contributions. Not a general 'It would be interesting to hear more from this group.' Instead: 'Let's have a discussion. Take yourself off mute and share what you think about that.'



Create something together

- There is a saying amongst change managers that people are much more likely to support something they helped to create.
- Create an artefact, a shared document, a roadmap, something visible. Zoom whiteboard, MS Teams, Mural, Google Slides and Jamboard are examples of tools that enable you to do this.
 - The image on this slide is an excerpt from the Collaborizza mural for collaborative team building, used with permission

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Recognise the full human

- According to Sirota and Klein (2014), one of the three major motivators for people at work is camaraderie - as important as fairness and achievement. There is a need to create space for people to be themselves, and to invite a little human connection.
- In my remote team, we create space at the beginning to check in with one word or a phrase about how they're doing, and then at the end, to check out with the same. It bookends our meeting with something personal, reminding us we are humans not widgets.

10



Connect with Transformed Teams

We work with leadership teams to unlock workplace potential in hybrid workplaces

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