

TIPS FOR PREPARING AND DESIGNING GREAT VIRTUAL SESSIONS

Virtual meetings and presentations don't need to be a snooze fest – there are many ways to turn them into experiential sessions. Here are some tips and tricks to get you started.

VIRTUAL SESSIONS PREPARATION TIPS

Practice, practice, practice. Practice the mechanics of each part of the agenda and become familiar with the web conferencing platform. This gives you the chance to make sure the activities are working as expected and you'll know what to do.

Enable/disable web conferencing features. Many platforms offer features like raise hand, mute participant beeps, mute participants, polling, and chat – but they're not all enabled by default. Consider configuring your meeting to disable the beep when participants join, auto-mute participants, and enable polling and chat.

Be precise. Be as specific as possible in written and verbal instructions. For example, "Share your answer in the chat panel. Make sure you share with 'All Participants.'"

Bookend and buffer. Consider adding 15 minutes of dedicated time for joining, dialing in, and helping people get connected at the start of the session, as well as time at the end for open questions or networking. Treat virtual milestones like in-person milestones and put "set up" time and "tear down/debrief" time on appropriate project partner calendars.

Back it up. Have a Plan B. What happens if someone (or maybe everyone) can't access the technology for any reason? What's your plan for them to still participate and contribute?

Create an agenda.

- Align on the **purpose**. Workshops that are heavy on "tells" are less effective because it's hard to keep people's attention. Instead, focus more on peer-to-peer collaboration, best practice sharing, and application.
- When people log in, have an **icebreaker** activity available to encourage small talk. Use this icebreaker to teach participants how to use some of the functions they'll need later, such as polling, screen annotation, or chat.
- Include **breaks** for sessions over 60 minutes, especially if you're making participants think a lot.

Use PowerPoint effectively. There's a right and wrong way to use PowerPoint, especially for virtual events.

- ✓ **Do** use slides as visuals that support the narrative or concept under discussion.
- ✓ **Do** use slides as placeholders for participation (using annotation tools).
- ✓ **Do** include written instructions for an activity you're asking participants to complete.
- ✗ **Don't** dump all the content on a slide and just read what's on screen. Fewer words on screen; more dialogue, interaction, and engagement.

Extend the experience. Consider having some sort of social aspect outside of the classroom to create the community vibe that you get when you're in person. For example, before or after a virtual workshop, ask participants to share stories, best practices, and questions with the rest of the class. If it's right for your organization or team, you might add a virtual cocktail hour or coffee break.

Train the trainer. Include a training session for facilitators and producers. People may not be comfortable with facilitating remotely. Getting them used to the technology is the biggest challenge. The sessions are only successful if the technology feels like a non-issue. If you make a big deal about the tech, the participants start to get nervous about it.



VIRTUAL SESSIONS

DESIGN AND IN-SESSION TIPS

Roles. It is best to have clear roles identified in advance (unlike in-person sessions, where you can shift as you go) and a supporting cast for virtual experiences. The size of this team varies based on the audience size and logistical complexity. Here are some typical roles.

- **Facilitator:** This is the primary emcee for the event. Their job is to keep the conversation moving and engage participants. If you have more than one facilitator, identify a clear lead for each part of the agenda.
- **Producer:** They handle the technical aspects of the event, such as queuing participants in large groups, managing the platform, supporting participants' technical needs, and preloading content for breakout rooms.
- **Engagement Specialist:** In especially large groups, you may find that the technical or facilitation needs of the session are more than a facilitator or producer can handle alone. The engagement specialist takes over the participant-focused aspects of the session, such as monitoring the chat, queuing participants, and answering or surfacing participants' questions.
- **Breakout Room Host:** A good practice is to identify a host for each breakout room in advance. If you're going to rely on the participants to self-facilitate, make sure you provide them with the proper guidance and practice in advance and that the instructions are simple and clear (aim for a fifth-grade reading level).
- **Note Taker:** Most likely this role will be covered by one of the people listed above, but be sure to identify who should take notes before the meeting.

This ain't your mama's webinar. Some people may be used to attending traditional text 'n' next webinars where they passively sit by and listen to someone present. Want a great virtual workshop? Design it to be interactive. Be sure to **set context that this will not be passive, and you need their undivided attention and participation.**

Coffee cup emoji. Use the coffee cup emoji to signal when someone needs to step away. It's helpful for facilitators to know who's gone on purpose and who's not paying attention. Too many coffee cups is like seeing people shuffle in their seats – it's your cue you've gone too long without a break.

And the other tools too. Especially in larger groups, ask volunteers to respond by raising their hand. The producer should be able to track and cue speakers. "First, we'll go to Sally, and then we'll ask Tim. Sally, go ahead and unmute your microphone."

Chat. Engage participants by asking for responses to questions using chat. Two-way dialogue is one of the best ways for people to process information, arrive at conclusions, and gain perspectives from others.

- Have a producer respond in chat and periodically ask for discussion summaries.
- Teach people how to use the tools by building that into the experience early in a non-essential way (such as an icebreaker), so that:
 - Participants are clear and comfortable using them and having robust conversation.
 - They're not trying to figure it out during an essential activity.

Breakout rooms. Just like at an in-person event, you can create separate workstreams or different discussions and then bring everyone back together to share their thoughts and spur more conversation. Think of these breakouts like table groups with eight to 10 people per group.

Annotation tools. Many platforms offer the ability to have participants point to something or type on screen, making the sessions more collaborative. Leave space on your slides so people can share their thoughts directly on screen and check or circle options.



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