Facilitating Video Conferences and Webinars

Checklist

- Set up well in advance of start time to troubleshoot.

- Turn off your phones and screensaver.

- Have a glass of water nearby.

- To prevent an echo:

    - Use a headset if using your computer's microphone

    - Mute the sound on your computer if using a phone line

- Have a clock visible to manage time.

- Create a concise outline with simple, key words – it keeps you organized and focused on specific goals/learning objectives.

- If feasible, have a team member log in as a participant and ask them to monitor chat so they can alert you to any problems participants may experience.

Video Conferences

- The facilitator must be objective, neutral, and build trust, but most importantly, the facilitator sets the tone and mood for the group. Part of the facilitator's role is to:

    - Keep the discussion on topic

    - Prevent group think

    - Enforce the ground rules

    - Involve and protect all participants

    - Ensure process clarity

- Send the agenda/objectives to participants before the meeting so they can prepare for the discussion.

- Use a common visual focus (e.g. agenda, PowerPoint slides) to keep the meeting on track.

- Set ground rules in advance. Common rules include no multi-tasking, identify yourself when you speak, and remain muted unless speaking.

- Depending on the group, you may need to include relationship-building activities to develop trust, rapport, and a feeling of openness.

- If problem solving, agree on the process for decision-making and make sure participants agree on the problem before agreeing on the solution.

- To involve reflective staff members, incorporate a silent brainstorming session before a round robin, or ask them what they think of a specific comment. These participants often have ideas the group hasn't expressed, and it is important to involve the entire group.

- At critical junctures (e.g. key agreement/decision, input required), ask each person by name if they agree or have an idea to share.

- Probe for the bigger meaning in vague answers.

- Isolate critical points and synthesize what the group says.

- Look for non-verbal cues and hidden agendas. If you think someone is not on board, see if you can draw out the reason (e.g., I want to make sure we hear from everyone. Sarah, what do you think?).

- Try to stay compassionate when dealing with disruptive behavior – participants usually react this way because they are scared or do not feel heard. Make them feel their contributions are valued and find ways to prevent them from derailing the meeting. Citing time restraints can help, you can also put items in the "parking lot" (to be discussed further if time allows or continued offline).

- Remember that the process is just as important as the results.

- Before ending the meeting, review what's been done, what's going to be done, and make sure action steps (e.g. who by when) are set. At the next meeting, follow up on the progress of those action steps.

Webinars

- Have participants practice using the webinar features (e.g. raise your hand, write in

the chat, etc.).

- If the facilitator(s) are not using a webcam, display photo(s) so participants can visualize who is talking to them.

- Create anticipation and maintain engagement by mentioning a topic you will discuss later in the webinar.

- Establish and maintain a high energy level to keep participants interested, increase the perception of self-confidence, and indirectly energize the topic (e.g. this must be important because he/she is excited about it). To stay energized and sound relaxed, you may want to stand up and walk around.

- Changing visuals will discourage multi-tasking – use graphics and simple text.

- To keep your presentation interactive, plan content for half the time allotted (e.g. 30 minutes of content for a 60-minute call).

- Make time to ask for questions and comments. This honors participants' experiences, and you can use their comments to highlight the information you want to get across. It helps to:

  o Warm up your audience and build rapport before you start asking questions

  o Encourage conversation by asking questions and not giving the answers right away

  o Ask good questions. The quality of the question will determine the quality of the response. Avoid compound and closed-ended questions.

  o Be prepared to ask questions and make comments to keep the discussion going (e.g. I often...)

  o Summarize the responses and ask follow-up questions to probe, redirect, etc.

  o If someone is dominating the conversation, jump in as soon as they take a breath (e.g. has anyone else had a similar experience) or cite time constraints. If you let them go on, you'll lose everyone else.

- Use the chat feature and polls to learn about your audience and to encourage them to think more deeply about the material. Use it to challenge assumptions, gain a new perspective, think out a process, etc. It helps to:

  o Ask an open-ended question at the beginning of the webinar (e.g. what is your biggest challenge?) and continue asking questions throughout.

o Build in breaks for questions so the chat area doesn't become too hard to monitor. Tell participants to submit questions as they arise, and you will answer them at designated intervals. Another option is to say, "I'm going to pause for a minute to catch up on chat."

o Ask participants to share their takeaways at the end.