How to become a bulletproof Online Facilitator

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Dear reader,

Have you found yourself in the role of an online moderator and remote facilitator of workshops and meetings? Are you interested in getting so ideas and useful tools to improve you online facilitation skills? This guideline offers you valuable insights to effective online facilitation, offers practical ideas and hints how to handle technical issues such as the prefect light and video set-up for online events and guides you how to design interactive agendas for your remote workshops.

We will be happy to witness your successes as "bullet-proof" online facilitator.

RCDN Team

Cheat Sheet Online Facilitation

For a really fast overview…

If you keep the following five aspects in mind, things will run really smoothly with your online workshop:

Top 1: After 60 minutes energy runs low

Attention decreases faster in front of the computer screen than in the real workshop room. After approx. 60 minutes, concentration decreases significantly. After that, people in front of the screen already become restless and are no longer as receptive - which the moderator may not notice due to the fact that we have less body language and less facial expressions. So be shorter, integrate, work in dialogue, address everyone again and again. Rushing the content through is useless. During the break, open the window, drink coffee or move around.

Top 2: Short input, long interaction

In a seminar or workshop, an input can last up to 30 minutes. Virtually this is clearly too long, at least when we are together for a day. Frontal listening is overstraining and makes you uneasy. The content must be prepared in a more creative and interactive way. Almost all exercises or games can be "transferred" online. You can have good experiences with Zoom and the so-called breakout sessions: Here a group is divided into small groups, which then work together in groups of three or four on tasks and/or exchange ideas.

Top 3: Direct announcements instead of open questions

In a traditional face-to-face workshop moderation, you may ask introductory questions to the round, such as "Who wants to start?" or "Who is next?" or "What do you think?" In the seminar room eye contact is enough. In the virtual room there is more silence. There are double exclamations or irritations because facial expressions and gestures are hardly manageable. If you can "ask" hesitant people in direct contact through body language, this is much more direct in virtual space. Here, a clear address also provides security. For example, saying "Semra, you start please. Next is Vladimir. We now proceed in the order of the screen windows."

Top 4: More preparation than usual

In some traditional workshops you may enter spontaneously in order to work with the moment, the current topics and the existing emotions in the room. With digital moderation, all templates, activities and questions should be created beforehand. The participants should also familiarise themselves with the content beforehand. The preparation effort, for example for the creation of online whiteboards on Mural or Miro, is much higher than in a classical seminar.

Top 5: The role of technical moderation

With up to six participants, the group size can be handled well as a sole moderator. The typical group size tends to be 10 to 12, which makes it harder to keep an eye on everyone. If there are technical problems and questions, it gets very complicated. "Disruptions have priority," the famous German psychotherapist and educator Ruth Cohn once postulated. This guiding principle also applies to digital moderation in situations such as "My computer is down, where are you now?", "Which screen are you on right now?", "I'm lost, can you help me?". Here it relieves both the main moderator and the participants if these technical questions are clarified in the background by a technical support person to ensure a smooth online exchange.

What is Remote Facilitation?

In simple terms, a facilitator is someone who makes a group process or task easier. They do this by guiding groups through a process, helping to develop understanding, and improve participation and collaboration. By employing facilitation techniques and methods, the best facilitators help teams move towards their desired outcomes in a structured manner.

Traditionally, facilitators work with groups in live settings, facilitating workshops, team development days, training sessions and more. As more organisations and teams become remotely distributed and have staff spread out all over the world, the need for facilitators to help facilitate workshops or meetings in a remote setting is growing.

Whether you are already a seasoned offline moderator wanting to make the move to remote facilitation or the manager of a remote team, the guide and best practices below will help you and your team make the most of the time you spend together online.

Why Running Online Workshops?

As more teams and organisations become globally distributed the need for workshops, meetings and training sessions that can be delivered online also rises. Bringing together people into an online setting alone is not enough to guarantee success. The effectiveness of any meeting or workshop is often predicated on the skill of the person facilitating and the process they have designed. Online facilitation for a virtual meeting or remote workshop is no different.

> **Some situations where you might use remote facilitation:**
>
> - Distributed teams with remote staff spread over several locations in South East Europe
> - Hybrid meetings, where some people are in one location and several remote workers call in
> - Ensuring workshops or meetings can go ahead even in difficult circumstances, for example: with staff illness, travel bans which are experiencing during the COVID-19 pandemic or environmental concerns
> - Delivering online coaching and mentoring
> - Online webinars
> - Online project presentations or orientation of new team members

Which Kinds of Online Events Exist?

As organisations employ increasingly virtual teams or you find yourself suddenly working remotely from your home office, you may be asked to run meetings, workshops, even whole conferences and much more of your traditional working practice online. Here are just a few activities you may have to facilitate online for your team as they work from home, co-working spaces or elsewhere in the region.

Different Types of Online Events

Virtual Meetings	Online Workshops	Webinars	Online courses

Virtual Meetings

Virtual meetings are becoming more common and remote staff will likely attend many virtual meetings every week. These might include daily-stand-ups, all-hands meetings, discussions and more. Like all meetings, virtual meetings should have a clear reason for being run and a specific goal in mind.

Remember that meetings that include face-to-face communication can be hugely important for keeping distributed teams connected and engaged, and that any challenge of the remote setting can be overcome with thoughtful facilitation and well-designed sessions.

Online Workshops

While online workshops employ many of the same techniques and methodologies as live workshops, online workshops have special considerations, challenges, and potential benefits.

A well-designed online workshop can help remote teams align, generate ideas and solutions, build trust and relationships, and strengthen remote team culture. In these scenarios, online sessions are not only a bonus, but they are a necessity for teams that wish to be productive while being separated.

Remember that choosing the right workshop methodology and process is as vital in an online space as in a live setting. You might consider employing a remote design sprint or open space style format. Design your workshop with your purpose, team and the restraints and benefits of remote working in mind for the best results.

Asynchronous communication and collaboration tools are key factors of any remote team, but there is enormous value in real-time workshops that are expertly facilitated.

Webinars

Simply put, a webinar is an event that is delivered online. In a webinar, one or more speakers often deliver instructional material to their attendees and conduct discussions, polls, and participation over online software.

Webinars often differ in their approach to interactivity – some may be mainly presentational while others feature interactive elements where attendees may ask questions, respond to polls or engage with the speaker.

Choosing the right webinar software for your needs begins with design. An unstructured webinar is likely to be unproductive and a waste of time. Carefully design your webinar which matches with your audience and purpose, choose the software that allows you to engage them in the right way and then use your facilitation skills to deliver the best possible session and meet your objectives.

A shortlist of recommended tools

GoToWebinar - https://www.goto.com/webinar

Big Blue Button - https://bigbluebutton.org

Edudip - https://www.edudip.com

Zoom - https://zoom.us/webinar

MS Teams - http://teamsdemo.office.com

Online courses and training sessions

Online courses and virtual training sessions benefit from the use of facilitation techniques and can help you add value to your online course offering. Since the online training market has developed quickly the last six months and is getting more and more competitive delivering carefully designed and well-facilitated sessions can really help your organisation to stand out!

Running courses or training for your remote team or audience likely includes lots of asynchronous learning and use of collaboration tools. Some online courses can be delivered entirely on demand, with pre-recorded materials and training software. You know best what is right for your audience and the training to be delivered.

It is important that the live components of any training sessions you conduct are well facilitated and well designed – with a limited amount of face-to-face time, every opportunity to connect counts and can be the difference between a successful or unsuccessful training course.

It is not the tools that make your online concept unique. It is your trainer DNA.

The biggest challenges of running remote workshops

Working remotely on any project or task comes with its own challenges. Virtual teams all have a set of best practices they employ to make their working days more effective, whether that includes the use of collaborative tools or well-developed working processes.

Workshops are, by design, highly collaboratively and require the deployment of varied techniques and processes to make them effective. But how do these function in an online or remote space? Here, we'll explore the challenges of running remote meetings or virtual workshops you should consider when planning and delivering your online workshop.

Technical issues

The reality of remote working and running an online workshop or virtual meeting is that sometimes, people will have connection issues or technical problems. Poor audio or video equipment, internet quality or loud workspaces can all contribute to lowering the quality of your digital workshop. This is a challenge that cannot ever be 100% mitigated, though you can take steps to prevent or limit the impact of technical issues on your remote workshop. Give people clear advice on what they need for the meeting and plenty of notice so they can work from somewhere with good internet and have their equipment in order.

If you plan to run regular online meetings with your colleagues, advocate at your company to help provide the proper equipment for all remote colleagues. Improving audio quality and limiting external noise can help ensure the meeting continues without drawbacks.

For bigger events you may face the request to include interpreters in your online meetings or webinars. Some video conferencing tools offer the ability to enable language interpretation. This allows you as the host to designate participants as interpreters on the web portal or during a Zoom session. When the meeting or webinar starts, you as the host can start the interpretation feature, which will allow the interpreters to provide their own audio channels for the language they are translating to. Attendees can then select the audio channel to hear the translated audio in their language of choice; they can also choose if they want to hear the original audio at a lower volume.

It is also worth communicating any additional needs – software, meeting links or requirements – clearly and well in advance of the workshop or meeting. If people need to learn a tool to contribute to the meeting or create a log-in to a new video conferencing app, make sure this

is done well before the workshop. Fifteen minutes that you have to spent in addition at the start of a workshop to help everyone get connected will either negatively affect your schedule or kill the momentum of your workshop.

Alignment

One of the main purposes of any workshop is to align the participants around a common goal or purpose. Successful workshops help a team collect their thoughts and come to a consensus on how to move forward. The facilitator is the person in the room who makes alignment happen and depending on the purpose of the workshop, team alignment can be the major takeaway from the process.

The alignment process is more difficult in remote or virtual environments Open communication is more difficult to facilitate, with cross-talking or an unwillingness to speak up in a remote meeting often cropping up. These constraints can sometimes mean that individuals or teams have less time to make their case or discuss concerns that would otherwise enable them to align. To effectively overcome this challenge requires getting the workshop design right – ensuring that you have activities or exercises to facilitate alignment – and in thoughtfully facilitating the group.

If you are conducting a problem-solving workshop in an online setting, alignment is extremely important and as a remote facilitator, you should be attuned to helping the group achieve that.

The main purpose of any workshop is to align participants around a common goal or purpose.

Lack of Shared Visual Space

Using whiteboards and flipcharts to illustrate key concepts and conclusions, using tons of post-it notes and helping a group create their own resources or prototypes on paper are all essential tools in face-to-face workshops. These resources are often kept up for the duration of the session, to be referred to again in later exercises or to be reflected upon.

The only limit on creating and displaying these in a live setting is wall space or resources – being able to walk around and move between grouped content is a massive bonus to the live meeting setting.
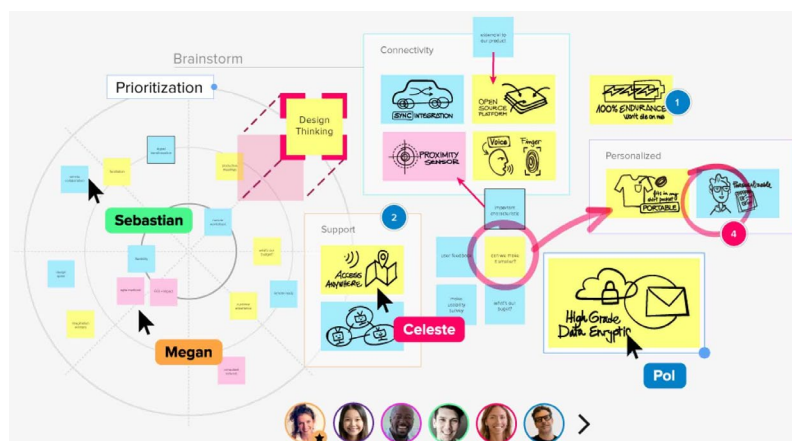
In an online setting, remote facilitators need to be much more conscious of how to utilise the available space and the number of artifacts or printouts they choose to supply. Asking a remote participant to watch a shared screen, consult a document and contribute to a shared whiteboard is unlikely to be productive.

There are many online tools you can use to create shared visual spaces for your online workshop or remote meeting but bear in mind the effects of visual overload or the distractions using all these tools can bring.

A shortlist of recommended tools

Mural - https://www.mural.co

Miro - https://miro.com

Conceptboard - https://conceptboard.com
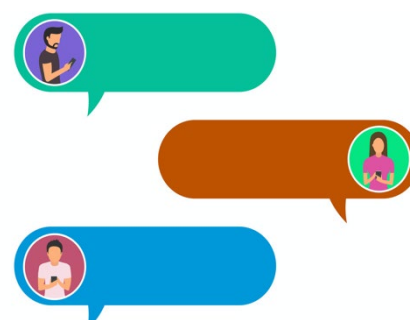
InVision Freehand - https://www.invisionapp.com/

Conversation flow is much slower

Even in the best-constructed online meeting or remote workshop, cross-talking or conversation flow can be a challenge.

Online chats lack the nonverbal cues we all give off and receive in real life that allow us to more accurately know

when and how to reply to an ongoing conversation. Furthermore, technical issues, large groups or sound quality can also slow down the communication process inside a workshop.

This challenge is surmountable in remote workshops and online meetings. Restricting conversation during some segments, allowing everyone the chance to speak for limited periods or having people ask questions in text chat before the facilitator then selects which to address can be effective. The size of the group, format of the workshop and the technical stability of everyone involved determines which approach is the best when it comes to solving this issue.

At the design stage, try including methods which require less live chat and more individual brainstorming and small-group work, or use practical activities such as dot-voting to effectively timebox and minimise unrelated discussions.

Engagement

Successful workshops live or die on the level of participants engagement. This is where the facilitator comes in - designing engaging processes and delivering workshops using techniques that help engage everyone in the room. In virtual meetings or remote workshops, engagement can be a challenge. If your workshop is randomly put together and features several hours of presentations without any activities or a well-designed process, people will quickly become bored or distracted.

Remote participants could be distracted by what is happening on in their other screens or by their physical environment, so it is important to agree on ground rules to keep participants focused, just like in a face-to-face meeting scenario.

The key to achieving engagement in a remote workshop is to design a process that is interactive, varied and tailored to your participants. Use tasks and techniques that exercise both creative and critical approaches, just as you would in a face-to-face workshop setting.

Etiquette for Interaction

Workshop or meeting etiquette can be vital to its success, and facilitators often ensure that the

> *The key to achieving engagement in a remote workshop is to design a process that is interactive, varied and tailored to the target group.*

expectations for behaviour and etiquette are outlined before or at the beginning of a session.

Enforcing this in the remote workshop if people get this wrong can be problematic and takes up precious time, so be sure to make this very clear to all participants. Furthermore, organisations with an undeveloped or non-existent online/video communication culture require special consideration.

> **Some basic tips for online etiquette include:**
>
> - learning to use the mute button when not speaking;
> - locating to a quiet environment;
> - ensure you are well lit so other attendees can see your face and that you are not backlit;
> - paying attention to what is going on in the room; and
> - not doing other work or answering e-mails.

Just as all communication skills need to be developed and polished, so too does online or virtual communication. If you are working in-house or with your own team, take some time to help your team communicate better online. If you are freelancing, use the opportunity of the remote workshop to demonstrate best practices and distribute an etiquette or ruleset ahead of time.

Using a separate Slack channel for facilitators to communicate while the meeting or workshop takes place in video conferencing software is also a good solution to adjust the session.

Co-Facilitation

Co-facilitating is a great way of splitting workload and bringing multiple skill sets to the table in a live or online workshop. That said, co-facilitating in an online setting certainly gets more complicated without the non-verbal cues one can have in a live setting. Passing the torch or linking sections between facilitators can be clumsy and face technological complications that come from having multiple people sharing screens, resources or collaborating in real-time.

If you are co-facilitating with another facilitator or with a client or manager, it can also be difficult to have a side conversation midway through the workshop. Being able to quickly chat and adjust the session in a live setting by stepping aside becomes more difficult and will likely need to be done during breaks or in another chat room.

Remote facilitation often requires the spinning of multiple plates and while this is doable, every extra task or

window you add to the equation creates the possibility of stress or mistakes. Remove as much stress as possible by carefully and thoughtfully planning your workshop and liaising with your co-facilitator or client ahead of time alongside having a system for side-discussion that works for you.

Some tools such as Zoom have the option for private chats in parallel with the main session. Using a Slack channel for facilitators to communicate while the meeting or workshop takes place in video conferencing software is also a viable solution.

A shortlist of recommended tools

Slack - https://slack.com/

MS Teams - https://teamsdemo.office.com

Discord - https://discord.com

Teamwire - https://www.teamwire.eu

Managing the Group of Participants

Identify the goals and outcomes with the constraints and benefits of remote in mind

Every workshop should have some goals and outcomes in mind – these should be discussed and ideated upon with the challenges and benefits of remote collaboration in mind. An alignment meeting has different goals compared to a problem-solving workshop or design sprint, and while all these are achievable in a remote setting, achieving the desired outcomes may require different approaches or adjustments.

For example, a design sprint may require the use of more robust collaboration tools such as online whiteboards in order to be effective. Effective prototyping may not be doable in a remote workshop, so your goals and expected outcome should reflect this.

That said, bear in mind the benefits and unique opportunities that a remote setting offers – moments of independent working, focus and a wide array of experiences, cultural exchange and focussed work.

The benefits of having a remote team – diversity of thought, high talent pool – are also benefits you can lean onto when designing your outcomes. Regionally distributed teams can give regionally distributed insight – use this advantage!

Know your audience and set-up

The first step in designing a remote workshop is to understand your audience and their specific needs. This is true for any facilitation scenario but is especially true in remote settings where personal cues and body language are more difficult to receive and the technological tools can present some boundaries in communication.

Circulating a preparatory survey or having some small meetings with stakeholders can help ensure you are creating a workshop with your audience in mind. Remember that the best workshops are bespoke in nature and really take into account the needs and makeup of the group being facilitated.

It is worth noting that knowing your audience and their set-up is an imperative when beginning to design a session. Your exercises and methods must be tailored to whether you are working with entirely remote participants or a co-located team with a couple of virtual members calling in.

Effectively Using Breakout Groups

A winning mindset for designing and running a remote workshop is to recreate the live workshop experience as much as possible. Think of the last full-day workshop or conference you attended. How much productive conversation happened in the breaks, between activities or while just getting a coffee? Were full group discussions as effective as more focused breakout groups?

All of these opportunities to communicate in groups of varying sizes is conducive to a successful workshop, particularly if it is lengthy and the group will benefit from variation. This is challenging to achieve in a remote workshop setting, though should be considered early in the workshop design process.

Remember that remote workshops do not allow for the same level of non-verbal communication as face-to-face meetings: reading body language, for example, is difficult to impossible to achieve online. Informal chats during break time or the ability to break off into smaller groups is also difficult to implement well.

The challenge here is how to create space in the agenda for those kinds of breakout sessions or small group discussions and how to implement them in practice. Zoom, for example, supports breakout sessions, or an

alternative would be to have multiple small meeting rooms on your video conferencing software. This can be cumbersome and there is the obvious issue of teams transitioning into small groups and then reconvening.

Group Size	Breakout Options
6	2 Groups of 3 People 3 Groups of 2 People
10	2 Groups of 5 People 5 Groups of 2 People
16	2 Groups of 8 People 4 Groups of 4 People 8 Groups of 2 People
24	3 Groups of 8 People 4 Groups of 6 People 6 Groups of 4 People 8 Groups of 3 People

You may find that your workshop does not require remote breakout sessions and instead find other ways to create your desired outcomes. Remember that good facilitation is always conducted for the benefit of the group and the underlying purpose. Only use breakout sessions if they are the right fit.

Carefully consider the number of participants

One of the strengths of online workshops is that you can invite people regardless of geographic location or other limiting factors. It is also easy to get lots of people together without issue. That said, not every workshop or meeting needs everyone to be present and in fact, limiting the participants for certain workshops can increase their efficacy.

Depending on the design and purpose of your workshop, you may want to have a smaller, focused group in order to achieve your goals. If everyone in an organisation should go through the workshop process, perhaps you need to run several separate workshops.

Think again about your goals and outcomes and choose your participants and number of workshops based on what you learn here. Often, holding a single primary

workshop with major stakeholders who then transfer results to their teams is a good approach.

Have a moderator for text chat channels

On the subject of text channels, having a place where participants can make notes and ask questions for the group or facilitator while keeping the meeting moving is a great approach.

Moderating that channel and answering those questions while also facilitating a workshop can be difficult and mean you are less effective in other areas.

If the needs of the workshop or size of the group calls for it, consider getting someone to moderate the text channel, respond to questions where appropriate and pass on questions or topics for group discussion if necessary. Finding a way to ensure everyone is heard and able to voice concerns while also keeping the process moving is good for everyone.

Choose Appropriate Exercises

The facilitation process often asks for the inclusion of several exercises or activities in order to lead teams through a process effectively and to get them thinking in innovative or creative ways. Exercises, games and methods are awesome though remember that what works in a face-to-face workshop may not work online. Large group games that require everyone to be in the same room and move around are obviously not applicable to a remote workshop, but some exercises are not so clear cut.

Exercises that require large group discussions can be unwieldy in an online setting and breakout sessions can be difficult to facilitate and move between as a facilitator. Solo work with short presentations and group feedback can be very effective. Though finding the right exercises for remote workshops can be tricky, they can still be vital for a successful workshop – they just need to be carefully chosen and adjusted for remote teams.

Remember that tasks often take longer in an online workshop so plan accordingly. Delivering instructions can also be more difficult – try using remote activities and

exercises that are simple in nature and easy to explain. If your exercise requires drawing or the use of pens and paper, be sure to communicate this ahead of the workshop.

So long as you take the time to intelligently plan and design your online workshop or virtual meeting, there is no reason you cannot be creative and use fun exercises to keep your participants engaged!

A shortlist of recommended ressources for energizers

Icebreakers: Start your online meetings with more than 200 questions designed to build trust, connectedness, and psychological safety - https://icebreaker.range.co/

Brightful Meeting Games: Super interactive icebreaker games designed for remote meetings. Work with all video conference tools, nothing to install, no signups, no ads, and free - https://www.brightful.me/play

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Use Polls and Anonymous Voting

Using polls with your participants can be an effective way of getting the feedback you need quickly and efficiently. Remote facilitation often requires that you simplify and redesign parts of your in-person process to be more efficient in a live setting.

Some aspects of the online workshop will be exactly the same as the one you run face-to-face, whereas others simply take too long or require rethinking to be effective in an online setting.

The key here is to facilitate contributions and collaborations from your team without getting bogged down. Use online tools such as online polling to make the process more efficient and consider allowing anonymous voting if you're having trouble getting people to speak up.

A shortlist of recommended tools

Slido - https://www.sli.do

Mentimeter - https://www.mentimeter.com/

Aha Slides- https://ahaslides.com

Create a remote-friendly schedule

Online meetings are often tiring, sitting in front of a computer screen for hours at a time without a break can kill any enthusiasm for a workshop. At least after 60 minutes you should have a break of ten minutes. Design a schedule with plenty of breaks and a mix of tasks that keep people fresh.

Try to include opportunities to step away from the computer and move around. Really consider what is most vital in your remote workshop agenda and keep it lean. In the opinions of many facilitators, online workshops should be shorter than live workshops by design, and as such, you may want to run a sequence of workshops or remote meetings in order to achieve your goals without mentally exhausting your participants.

Include opportunities to step away from the computer and move around.

All workshops or meetings benefit from careful planning and design. The success of an online workshop or remote meeting is often predicated on effective design and a well-oiled process. Running a remote workshop without carefully designing the exercises, purpose or flow can mean that participants get lost or frustrated and that the effectiveness of the session is limited.

Technology: Audio and Video

With any remote interaction, you have to get the technology right. Do not skimp on audio or video—they are critical.

Audio: Get Heard Properly

Bad audio is a showstopper. Test in advance and consider a backup plan, i.e. have direct phone numbers to call. Here are the four main concerns with audio when running remote workshops:

Choose the Best Audio Option

There are three means to connect audio:

- Wired telephones and speaker phones provide the most reliable audio connection. Use them for co-located groups and dedicated remote workers whenever possible.
- Cellular telephones have a dedicated connection that is separate from the wi-fi you may be using. You can often improve your experience by taking advantage of both cellular service for audio and wi-fi for screen sharing and video.
- Voice-over IP (VoIP) refers to digitised audio streaming through your computer, commonly found in programs like Skype or Viber. Audio quality suffers when wi-fi bandwidth is limited, the connection is poor, or there is high demand for available bandwidth. Turn off webcams to free up bandwidth, and use a hard-wired ethernet connection for better performance, if possible.

Optimise Microphones

There are two common microphone types:

- Cardioid mics focus their attention on what is in front of them.
- Omni-directional mics can pick up sound from any direction.

If you are dialling in from remote locations, get a quality, wired headset with a cardioid condenser mic. If you are

part of a co-located team, get a quality speakerphone with an omnidirectional mic so everyone can speak and hear. USB omni-directional mics are also a good option if are using VOIP on a computer.

Avoid Feedback

When a microphone gets too close to a speaker, what comes out of the speaker "feeds back" into the mic. This loop quickly becomes an annoying screech.

Imagine a video conference with five co-located members and five remote members. As long as the co-located team uses a single mic and speaker, things are fine. But when someone else in the same room joins the call, the audio from one device is picked up by the mic of another. This might also happen if a remote person is connected to the call on a cell phone and computer. Either way, the result is feedback.

Prevent feedback by muting your phone or laptop before entering the call. Many conference services allow the host to mute everyone at once or individuals one at a time. If this is not possible, have the presenter locate the live mic and then ask everyone else to mute.

Eliminate Echo

Echo makes it impossible to participate in a meeting. If you are hearing the echo, the good news is that you are not causing the echo. The bad news is that the person causing the echo probably does not know that there is a problem. Echo primarily affects remote callers, but they are rarely the cause. This puts the burden on remote callers to stop the show and insist on diagnosing the problem.

As a facilitator, you should help. First, mute everyone who is not talking. This should stop the echo, but the problem will return unless you diagnose it further:

- Ensure co-located groups are using only one microphone, all others are muted.
- Reduce speaker volume or move speakers further apart from each other.
- Check that remote people using a phone have their computers muted too.

Video in Mixed Type Workshops

There are two things people need to see in a meeting. They need to see each other, and they need to see the content being discussed. In co-located meetings it takes zero technology. Just look around to see everyone and everything. In a fully distributed workshop, this is also pretty easy. You connect to a video conference and share your screen.

Online Participants   Facilitator   Local Participants
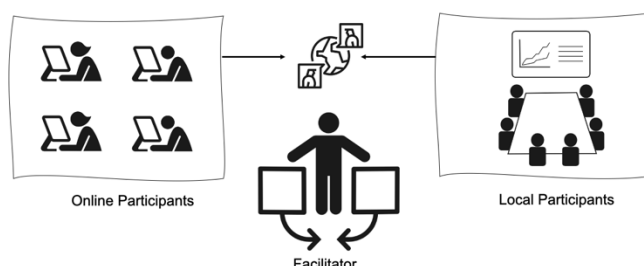
But when some people are in a room together and some are remote, you will need to put more effort into video. This diagram shows the planning required for a mixed-location, interactive design workshop. One group is co-located in an auditorium while others connect from locations around the world. This type of "Mixed Team" setting requires an extreme amount of planning and coordination.

Make a Good Impression

Good lighting goes hand in hand with good video call quality. The following aspects will help you to look professional and well-lit on every video conference call or online workshop.

Sit Facing a Light Source

Sitting with your back to a window or bright light source can negatively impact the quality of the video call by giving you a harsh silhouette effect. Whenever possible, sit facing the window, desk lamp, or other light source to ensure your face is well illuminated and clearly visible.

Optimize Natural Light Sources

Natural daylight creates pleasing, accurate skin tones in the camera and renders accurate colours. Setting up

your conferencing system in a room with a lot of window light is useful in creating a well-lit, professional setting.


Use Soft Directional Light

Avoid using bare bulbs in your video conference room lighting. A lampshade or a diffuser will reduce harsh shadows and soften the lighting in the room. Contrary to the popular belief, the closer a source is to a subject, the softer the shadows will play on that subject. So, if a lamp is too harsh, bring it closer to you. This may help boost the camera's exposure on your face as well. Balance natural lighting with properly placed soft white lamps to create a pleasing ambience in the room.

Use the Right Amount of Light

It is important that there is plenty of light in the room to get maximum clarity. However, it is possible to have too much light. If your window is too bright, lower the blinds or move away from the window to avoid overexposure. If a light source like a lamp is too bright, walk it away from you or dim it with a shade. If possible, use multiple light sources pointed at your face to fill in shadows and make the overall room lighting as even as possible.
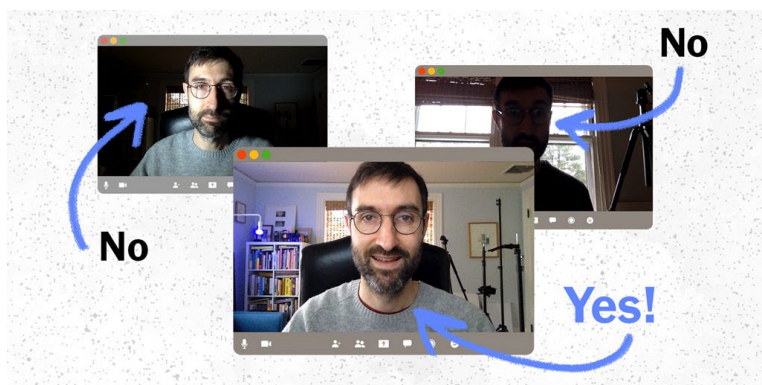
Record the Meeting – if you are allowed

It is likely that not everyone can make it to your remote workshop, particularly if your team is globally distributed and works across several time zones.

Record the workshop so people who cannot attend can also benefit or so you and your team can review important points and improve your process later on. Ask all participants for their approval to record the meeting before you start the recording. You may also want to use transcription software for easy reference or so that teammates with hearing difficulties can engage with what's been done.

All that said, bear in mind that a recorded workshop is not the same as participating in a live workshop and depending on the needs of your group and the number of people who could not attend, you might be better to run multiple workshops. The process is often as important as the outcome and you will not want to deprive people of that experience unless necessary.

Pre-record what You Can

In a remote setting, having pre-recorded videos of walkthroughs, tutorials or project presentations can not only save time but reduce pressure in the session.

Many recipients really benefit from the inclusion of videos or images and varying the way in which information is delivered can help keep people engaged.

By preparing elements prior to the workshop, you can achieve this while also limiting the impact on your stress level. Remote facilitation is often a matter of juggling a lot of items at once. Easing the number of items, you

need to juggle on the day can really help you excel as a facilitator, particularly if you're new to the field.

A shortlist of recommended tools

Camtasia - https://www.techsmith.com/download/camtasia/

Screencast-O-Matic - https://screencast-o-matic.com

Free Cam - https://www.freescreenrecording.com

Annex: Troubleshooting Checklist

Remote facilitation comes with a multitude of variables and challenges. Being able to prepare and plan for each potential variable is wise though not realistic. However, being able to pivot when something does not go as planned, in a seamless and professional manner, can help lead to an undiscovered, potentially more successful outcome.

PROBLEM	DIAGNOSE	CHECKED
People are bored	- Stop talking, ask a question. - What prevents them from engaging? - Are these the right participants? - Is the timing awkward for their time zone?	✓
People are distracted	- Multi-tasking happens. - Is it momentary or chronic? - Can it be leveraged? Ask them to look up something for the group. - Do people need a short break?	✓
Timing does not work	- Running overtime is very common. - Can you safely omit an activity? - Can you reduce the number of share outs? - Can you break the agenda into two sessions?	✓
Technology does not work	- Find out how many are affected. - Can someone take over troubleshooting? - Can you shift the agenda order? - Can you move to discussion and take notes?	✓
Confused by exercise	- How many are confused? - Can someone help coach a small group? - Do you need to start again with everyone? - Can you make it simpler to complete?	✓
Not showing up on time	Life happens. Was it unavoidable?	✓

PROBLEM	DIAGNOSE	CHECKED
	- Can they catch up at a break? - Should the workshop start later? - Can they contribute in advance or asynchronously?	
Poor WI-FI / No internet	- How many are affected? - Can you continue without those affected? - Can you reschedule the session? - Can you use alternate wi-fi access? (Cellular)	✓
Nose and feedback	- What type of audio problem is it? - Diagnose an echo right away. - Mute participants by default or manually. - Call back in, sometimes that fixes the issue.	✓