



# Virtual Facilitation Master Class

# VIRTUAL FACILITATION

# Master Class

## WHY FOCUS ON MASTERING VIRTUAL COMMUNICATIONS?

Virtual connections with partners and customers can be more fragile than the connections we develop face-to-face. This also means that they can be easily disrupted and (unfortunately) misunderstandings may happen more often. The empathy, trust, and non-verbal communication that we rely on just don't carry over as easily into a virtual environment. However, with a focus on mastering the art, craft, and science of virtual facilitation, we can ensure that even when we aren't face-to-face, we are still able to engage, enable, and manage our partners effectively.

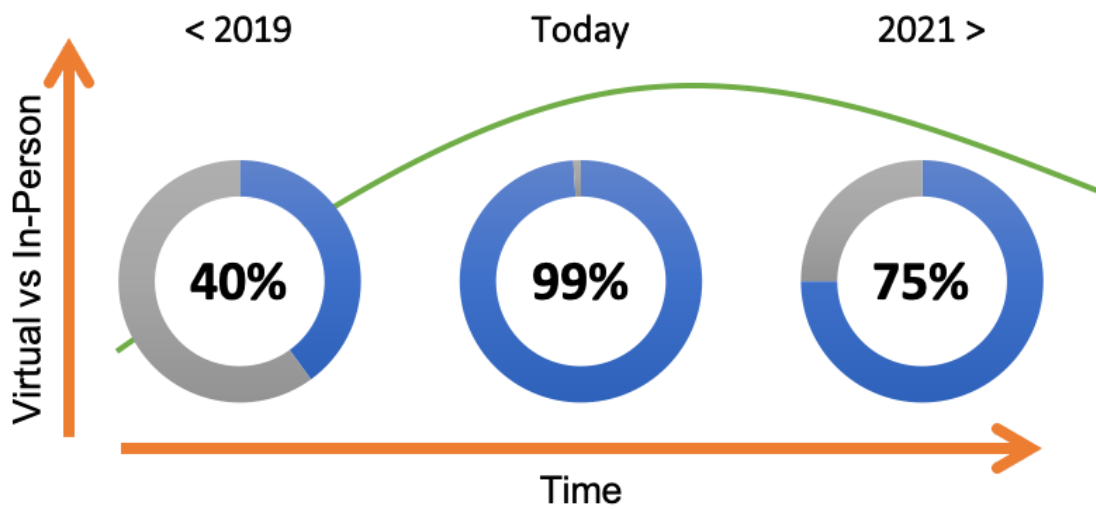
It's for these reasons that we've created the Virtual Facilitation Master Class to help you engage and thrive when working virtually with partners and customers.



## WHAT WILL WE COVER IN THE WEBINAR?

- Professional facilitation approaches in a virtual environment
- Fully exploiting the capabilities of virtual platforms
- Effectively holding important discussions virtually
  - QBRs
  - Forecast and pipeline sessions
  - Strategic planning meetings using virtual platforms
- Designing materials for virtual environments
- Running successful large-group sessions like webinars
- Best practices and ideas that you can use right now

Gartner.



Adapted from: Gartner Magic Quadrant for Meeting Solutions

## VIRTUAL IS HERE TO STAY...OR SO IT SEEMS

Gartner recently published a Magic Quadrant analysis of meeting solutions like Zoom, WebEx, GoToMeeting, etc. Gartner's research estimates that in 2019 only 40% of meetings were being held in a virtual environment. NOW, more than 99% of meetings are being held virtually. Gartner's conservative estimate is that once we return to 'normal' health, safety, and economic conditions around the world, 75% of all of the meetings that we have will remain 'virtual'.

## HOW DOES VIDEO IMPACT THE QUALITY OF COMMUNICATION?

Forbes Insight did a study on the impact of video. The results speak for themselves. When video was turned on, as compared to when participants were only using audio and screen sharing, survey participants found that the overall quality of communication was 62% higher, engagement was 73% higher, and levels of understanding were 50% higher. Pretty amazing numbers.

Needless to say, we'll be covering when and how to use video in the Virtual Facilitation Master Class webinar and playbook.



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## MASTERING VIRTUAL COMMUNICATIONS

For businesses all over the world, the move toward more remote and distributed work represents a significant challenge on many fronts. One of the most important dilemmas is how we stay engaged with partners and customers when so many of our go-to approaches may feel like they are limited by our inability to meet face-to-face.

Our aim is to provide you with some very practical details about how to ensure that you engage with your channel partners or customers effectively and professionally now and in the future.



## WHAT'S PROVIDED IN THE PLAYBOOK?

- Skills and behaviors that will position you as a pro
- How to engage your attendees and KEEP them engaged
- How to use all of the tools of the virtual platform
- Using video to keep engagement, trust, and empathy high
- Keeping the conversation going outside of the meeting
- General tips: design and delivery of your content
- A checklist covering most virtual facilitation requirements

# VIRTUAL FACILITATION PLAYBOOK

## SKILLS & APPROACHES

- Presence, pace, energy, engagement
- Quality, enunciation, tone of your voice
- Engage early (first minutes) and often
- Activate your virtual meetings
  - Questions, actions, activities



Pro Tip: invest in a high quality headset with a professional-grade microphone



## BREAK THE ICE

- Greet everyone by name when they join
- Leverage chat for attendance
  - Name, location, and role
  - Refer back to this later if needed
- Use an ice-breaker



Pro Tip: use ice breakers to re-energize long meetings or to re-engage participants



## USE ALL OF YOUR TOOLS

Keep attendees involved...

- Chat
- Q&A
- Surveys
- Whiteboards
- Screen mark-up
- Screen sharing
- Breakout rooms\*



Pro Tip: Ask 'fill in the blank' questions in chat: 'The one thing I need today is \_\_\_\_'



## VIDEO ON FOR MOST GROUPS

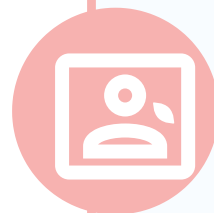
Everyone on video\*\*

Keep cameras on

- Improves engagement
- Mitigates empathy issues
- Improves trust
- Promotes accountability



Pro Tip: plan and test your lighting, angles, and background in advance



## USE OTHER CHANNELS

- Use chat groups (e.g. Slack, WhatsApp)
  - Creates additional/instant channel
  - Useful for pre/post meeting
  - Use for pre/post surveys
  - Use chat for assessments



Pro Tip: use chat to keep the conversation going with specific groups (e.g. sales, SEs, services)



## GENERAL TIPS

Engage with pictures and graphics

Use the 5:2:2:1 approach to agenda planning

- 5 minutes on a topic
- 2 minutes on questions/discussions
- 2 minutes on an action or activity
- 1 minute buffer



Pro Tip: don't go more than 5 minutes without engaging your attendees



\* Breakout rooms are great for enablement, QBR,s, and planning but they are only available as an option in most platforms

\*\* Video is best for groups of 10 or fewer. For bigger meetings, turn YOUR video on for a few minutes at the beginning



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