goAgile

Facilitation of Online Workshops
By Ole Jepsen

Since online "meetings" seem to be quite okay for many (if they're VERY well prepared and timeboxed to 30 or max. 60 minutes), I want to focus on improving *Online Workshops* where we *involve & engage* the participants and create ownership for the results from the workshop.

What you want…

Nothing beats face-to-face in terms of meeting effectiveness, so we want to get as close to face-to-face as possible, despite of the glass barrier (the computer screen) between the participants. We want to find ways to convert successful face-to-face workshop techniques into something similar that can work via web-tools. In other words, we want to run Online Workshops, where people "forget" that it's actually an Online Workshop and act as if they were in a face-to-face workshop.

Therefore, when you want to have successful Online Workshops, it makes sense to use face-to-face facilitation principles and techniques.

Tips and advice

1. Create something together

Like in face-to-face workshops, you want the participants to *create something together*. You want to involve & engage them, and have everybody contribute. Using Google Docs/Drive, where everybody types, moves, formats and deletes text simultaneously is one highly recommended way to get involvement in an online workshop. (When someone from the other side of the planet corrects one of my typos seconds after I make it, I feel *connected* and it feels *great*!!)

2. Everybody has "hands"

To involve and engage everybody in Online Workshops, everybody needs to have "hands" – as they have in a face-to-face workshop. For example, in face-to-face workshops, everybody can pick up a pen and write something on a Post-it or whiteboard. In Online Workshops, we need to copy this – and we do this by making sure that everybody has their own computer and thereby their own keyboard and mouse – the equivalent of the face-to-face pens and Post-its.

The natural thing to do when you have smaller groups of people in the same physical locations is to have them participate as a small group, sharing one computer, one keyboard and one mouse. While there are good things to say about this approach (relatedness, togetherness, etc.) – there are more disadvantages to this approach –the biggest problem being that we limit their **hands-on participation.**

3. Tools need to be implemented - not just installed

While the online collaboration tools are only 10% of an Online Workshop – the tools are a prerequisite for the reminding 90%, which is the *content*. Therefore, it needs to be *somebody's* main responsibility to make sure that the tools are well understood by the participants – to a degree that nobody really thinks about the tool anymore. There are a couple of things to say about this:
- When the IT-department is responsible for the tools, they most often think that their job is done when tool is installed (or works) on everybody's computers. While this is true from a pure technical standpoint, it creates no value whatsoever if the *people* do not feel comfortable using the tools as a natural part of their daily work.
- For the first (many) times, that a tool is used for collaboration, it works really well to have two facilitators for Online Workshops: A: One technical (co-)facilitator, who's not just taking care of technical issues, but who also cares about how/if the participants seem to be able to do what they want to do via the tool. B: The other facilitator can then focus 100% on the people and the flow of the workshop.

4. Your dream tool

Remember, that we want Online Workshops to be as close to face-to-face workshops as possible. Therefore, the tools we want should be as close to Post-its and whiteboards as possible. That means the tools should be:
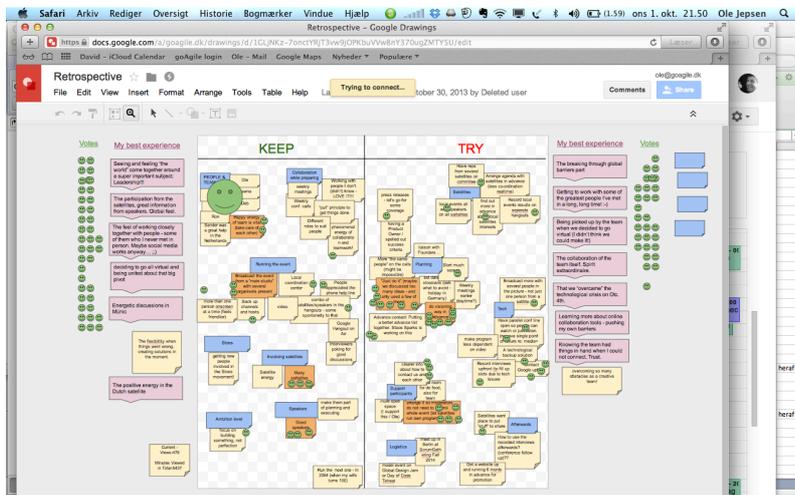- Visual (so it's easy to create visual elements)
- Collaborative (everybody can work on the same artifact simultaneously)
- "In your face" (as if the stuff was on your wall – by having a projector or big screen that display the stuff at all times)

5. Back-up channel

Until you're really familiar with a certain tool, it's very helpful to have a parallel connection on a more well-known platform. If – for example – your participants are new to Skype or Lync, then having a parallel tele-conference running for solving technical problems, is great. It's just too hard to solve Skype issues via a bad Skype connection!
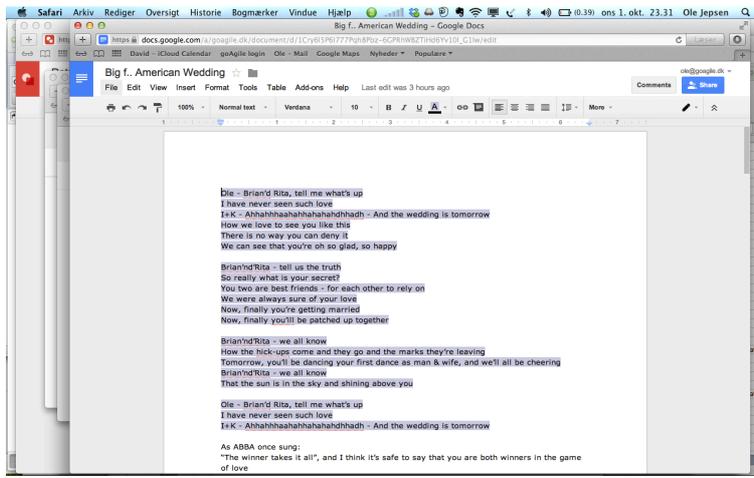
Two examples of successful Online Workshops

Retrospective on Stoos Connect

This was a retrospective on the Stoos Connect leadership conference, which was a 100% online, 6-hour long conference with participants from many different time-zones. Anyway – I just wanted to focus on the retrospective. @KristianHaugaard facilitated this retrospective using the tools: Google Hangout and Google Drive Drawing. Before the retrospective, Kristian had created a great template with yellow boxes for ideas, blue boxes for headlines, pink call-outs for things that were really memorable and little smileys for "dot-voting". So when somebody wanted to "write an idea on a Post-it", they just grabbed a "Post-it" (= a yellow box), and started to type, etc.

Co-writing a song/speech with my daughters

At my bonus-son's wedding, I wanted to write a speech or song together with my two lovely daughters. Not so easy, because we were located in three different "countries" at the time: Zealand, Jutland and Canada. So we hooked up on Skype and started a Google Drive Document – and had fun co-writing together. Actually, we never really got the Skype video to work, but we had voice via Skype and a common work-place via Google Drive. Within one hour, we had the speech we wanted it.

Ole Jepsen, goAgile
www.goagile.dk

Links

While the advice you can find online about Online Workshops seems to be very basic, there are a few semi-usefull sources listed here:

Online meeting in real life (fun!!):
https://www.youtube.com/watch?v=DYu_bGbZiiQ

Basic advice:
https://www.youtube.com/watch?v=DYYp0VEeB2s

The State of Virtual meetings:
https://www.youtube.com/watch?v=87Yz_CeVYCY

Retrospective from Stoos in Action:
ocs.google.com/a/goagile.dk/drawings/d/1GLjNKz-7onctYRjT3vw9jOPKbuVVw8nY370ugZMTY5U/edit

http://news.citrixonline.com/wp-content/uploads/2013/08/GoToMeeting_ebook_10-online-meeting-tips-and-tricks.pdf

http://www.facilitate.com/support/facilitator-toolkit/online-meeting-tips.html