



Digital Facilitation Checklist

Leading remote workshops that are easy, fast, and collaborative requires having the right tools and processes in place, so that during the session the focus can be on the participants. We created a high-level checklist to help you prepare for your next remote workshop so that you can keep working towards your greater why even through uncertain times.

MINDSET

Think progress over perfection.

It's common to start a workshop with incomplete information or uncertainty about the solution, but we don't want that to block someone from tackling a challenge in the first place. In our workshops, we encourage participants to focus on making progress instead of having to solve the problem entirely right away. In remote sessions, there's the additional barrier of getting used to new ways of brainstorming and sharing ideas using digital tools. We build in extra time in our remote sessions to practice using the collaboration tool because we don't expect everyone to write say, a digital sticky note correctly the first time.

Practice active listening.

Most often, we work with our clients to build a Core Team of subject-matter-experts from across their organization to participate in our workshops. We believe that because every team member was selected by leaders to join in the workshop, that everyone's voice deserves, and needs, to be heard for the engagement to be successful. In remote sessions, active listening requires a modified approach since you can't read the room or body language of participants. One way to practice active listening in remote sessions is to track which participants you have and have not heard from and then personally to invite the individuals who have not spoken as much to share their perspective.

TOOLS

Miro

Instead of printing large format posters as we do for in-person workshops, we build out our templates (e.g. customer journey map) for activities in Miro, a digital collaborative whiteboard (Miro also has features like a countdown timer and dot voting that makes facilitating even easier).

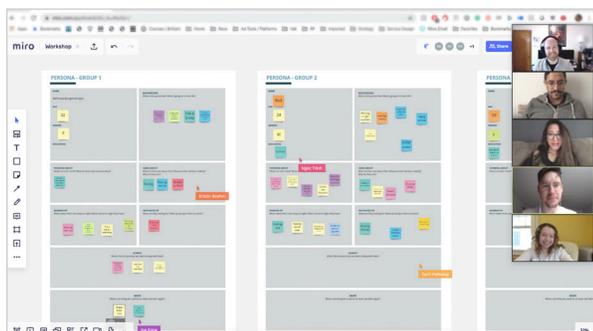


PHOTO: MIRO.COM

Zoom

Our workshop activities often involve breaking into smaller groups. Zoom's breakout room feature allows us to do just that, which is one of the many reasons Zoom is our first-choice video conferencing platform.

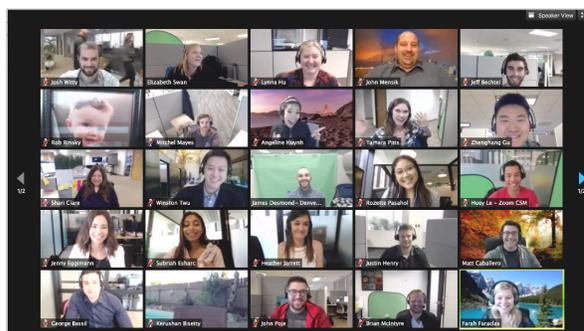


PHOTO: ZOOM.COM

MIRO SETUP FOR REMOTE WORKSHOPS

Set up the digital workspace

- Select your digital collaboration platform (we like to use Miro)
- Create a specific folder within the collaboration platform for the project/client (in Miro we create a new Team for each client)
- Create a new workspace (called a "Board" in Miro) for each activity planned for the workshop
- Set up the space to accommodate the activity and consider creating a digital option to make setup easier for the next workshop

Invite participants to the digital workspace

- Identify the optimal approach for inviting participants to join the collaborative workspace (we grant participants Miro Day Passes so they have edit access during the workshop)
- Invite workshop participants to the specific folder created for the project/client
- Confirm that workshop participants can only access their folder and not folders for other projects/clients
- Send an email to participants to remind them to create an account on the collaboration platform before the session

MIRO SETUP (CONTINUED)

Closeout workshop

- Export the workspaces and send to participants (if appropriate)
- Deactivate workshop participants if they do not need ongoing access to workspace

ZOOM SETUP FOR REMOTE WORKSHOPS

Schedule the workshop

- Schedule a Zoom meeting and create a unique URL to send link to all workshop participants
- Uncheck “Require meeting password,” unless you want to password protect the meeting and share the password with participants ahead of time
- Email workshop participants to remind them to download Zoom before the meeting

Enable breakout rooms

- Review workshop activities and determine if breakout rooms are needed and if so how many and how to group workshop participants (or plan to use randomize feature to determine small groups)
- Determine how you might name the rooms that might improve ease of understanding the activity (i.e., if you break into multiple groups to each work on a different “poster” in the workspace, then you can name the breakout rooms in Zoom “Poster 1,” “Poster 2”...
- Enable breakout rooms in the Zoom meeting by logging into Zoom > Settings > In Meeting (Advanced) > Breakout room turned on
- Inform participants that they can request the Zoom Host (moderator) in their breakout room by clicking the button in the bottom right

Prepare for the workshop

- Practice with at least two co-workers before the session by inviting them to the Zoom meeting
- Share the collaborative workspaces with them
- Split into breakout rooms
- Confirm they have proper access within the collaboration platform

Facilitate workshop

- Introduce the activity to workshop participants: goal, timing, inputs needed
- Lead facilitator (Zoom Host) breaks participants into breakout rooms for the activity
- Help participant who might not have seen/clicked the “Join Breakout Room” pop up
- Complete activity in breakout rooms (if possible, have a facilitator in each break-out room to lead the activity)
- Zoom Host check-in with each breakout rooms to check on progress and give a time limit warning
- Zoom Host closes breakout rooms and begins the 60-second countdown until the rooms closed and participants are brought back together