



VIRTUAL FACILITATION

The art of building trust on virtual platforms

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Virtual as the New Normal

1

Meeting virtually will dominate our ways of working amidst the COVID-19 crisis...



- Virtual Workshops
- Virtual Check-ins
- Virtual Meetings

...but it is not always that easy



...and to be successful virtually, we must overcome a fundamental challenge!

The Problem with Virtual

2

The perceived level of trust within established teams is at risk of dropping 83% when they experience a virtual distance upon moving away from physical presence.¹

THE RISK:
LACK OF
TRUST 

This means participants will **zone out, become disengaged, stop sharing ideas, feel reluctant to speak up...** and ultimately **impact will be reduced.**

If we manage to **establish an atmosphere of trust** between all participants on virtual platforms, we can help **stimulate creativity, collaboration, productivity and innovation.**



VIRTUAL IS HERE TO STAY

44% of business professionals expect the use of **face-to-face meetings for collaboration to decrease** in the future.²

70% of business professionals expect the use of **online collaboration platforms to increase** in the future.²

Tips for Virtual Facilitation

3

We have developed eight tips that will help you build trust on virtual platforms.



1

Find your
dedicated
facilitator

2

Remember
your basics

3

Check in



4

Put on
video

5

Incorporate
engaging tools

6

Leverage
breakout rooms



7

Use breaks
actively

8

Use virtual
whiteboards



Find your dedicated facilitator

A **VIRTUAL** session is **NOT A PHYSICAL SESSION DONE ONLINE**. It is a demanding discipline with a different dynamic, energy and flow compared to a physical session. To succeed, appoint a facilitator in advance of the session, who can steer discussions and the flow to ensure that everyone is included and engaged.

1

Upload the presentation beforehand to avoid technical obstacles.

2

Be there at least 15 minutes before the others to test the technique.

3

Decide rules of engagement: is there a raise-your-hand function that you can use or is it by turn?

4

Exaggerate your voice, pronunciation and pitch to come better across.



Remember your basics

- ✓ **Be on time – and finish on time**
- ✓ **Align on purpose and have a clear agenda**
- ✓ **Ensure that all voices are heard**
- ✓ **Appoint a tech savvy to assist**

Virtual sessions are more challenging to facilitate than physical sessions. Getting the foundation right is therefore more important than ever before. Set yourself up for success from the beginning by brushing off and reminding yourself about best practice as we know it from physical sessions.



3 Check in

3 concrete questions:

- How are you feeling?
- What are your expectations?
- Anything preventing you from being present?

Kick off your session by getting a feeling of the participants and creating a common starting point that you can anchor the session around.

...if you are brave, you break the ice and create an initial sense of belonging by asking everyone to share a picture of their workstation.



4 Put on video

ENGAGEMENT, PARTICIPATION,
and **EXCITEMENT** increase considerably if
we agree to turn on video and put on a happy
face!



IS THIS YOU?



**SHOULD THIS
BE YOU?**

Incorporate engaging tools

We want to be **ENGAGED**,
we want to be **HEARD** and
we want to be **INSPIRED**.



Prevent monotone sessions by using simple, engaging tools. For example:

- Mentimeter, Kahoot or Slido for quick polls, quizzes and word clouds.
- YouTube or Vimeo for short, inspiring videos that add flavor to the content (Monty Python is always a winner!).
- Music apps to get into the mood as the participants join the session.

Leverage breakout rooms

One of the truly great things in some of the virtual platforms is the possibility to easily create breakout rooms for the participants (e.g. using Zoom or WebEx). To get started in a heartbeat, watch small tutorials instead of reading tedious instructions.

How to get started:

1. Decide on how many breakout rooms - and name them.
2. Invite attendees and give assignments.
3. When they ping you, join them and give instructions.



Use breaks actively

In virtual sessions, participants will not be able to sense if others share their emotions or thoughts. By using breaks actively, you can **INCREASE SENSE OF BELONGING!**

Before going for a break, use engaging tools to:

- ✓ Take the temperature by asking participants to share a feeling or two.
- ✓ Request that participants give instant feedback on the content.
- ✓ Quiz participants on their new knowledge.



After a break:

Gather participants around the outcome, for example presented in a word cloud, and ask for further reflections.

8 Use virtual whiteboards

Move beyond **“BLAH BLAH BLAH”**. Several virtual platforms offer whiteboards for capturing and collecting insights and learnings from the session - during the session (e.g. Teams, Zoom, Miro, WebEx). This will help you stay clear on the purpose of the session, ensure a strong sense of progress, and serve as minutes from the session.



Overview: Platforms

4

You have a broad spectrum of platforms available that can and should be leveraged for virtual collaborations.

Different platforms provide different advantages, and to help you choose the platform fit for the purpose of your session, please refer to the table below.

	Ratings		Features		
	Usability	Full service	Video	Whiteboard	Break out
Skype for Business			Yes	Yes	No
Microsoft Teams			Yes	Yes	No
Zoom			Yes	Yes	Yes
WebEx			Yes	Yes	Yes
Klaxoon			No	Yes	No
Miro			Yes	Yes	No

Deep Dive: Tools

5

Mentimeter, Slido and Kahoot are three simple tools that can help you to engage and better interact with your participants.

Tool	About
Mentimeter	Provides a dedicated and easy-to-use tool for customizing polls for different purposes and audiences. Get started now: www.mentimeter.com
Slido	Allows you to interact with participants through Q&A, polls, and insights – all combined in one tool and platform. Get started now: www.sli.do
Kahoot	Enables you to quiz participants and make them battle against each other individually or in teams. Get started now: www.kahoot.com

Your Deloitte Support

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Our dedicated team can help you strengthen your virtual facilitation skills and create your fit-for-purpose session.

Your local team



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