



by zoe pappas

Seven practices for conducting successful remote/digital workshops

Right thinking

In March 2020, the COVID pandemic hit. We adapted quickly to our new reality – working from home, no travel, and using Zoom and MS Teams (or similar) to conduct business. We quickly moved away from in-person workshops and found new ways of working and collaborating. At the time, I'm sure many of us (including me) assumed that by August 2021 we would surely have 'snapped back' and life would be 'back to normal'.

Yet here we are, 15 months later ... case numbers are on the rise again (919 in NSW today, 25 August) and many parts of the country are in lockdown or have closed their borders to other states.

As I prepare to facilitate a large all-staff workshop for 150 team members (virtually), I thought it was time to reflect on, and write about, what I have learned over the past 18 or so months, and what it takes to conduct successful digital workshops.

1. Break it down

One of the reasons in-person offsites are usually designed as consecutive sessions over one to two days is that it's an efficient way to use everyone's time if you are bringing them together physically. In fact – if we are not all required to be in the same location at the same time – we can get creative with our format and break it down into different time periods, delivering the sessions in modules over a few days or a couple of weeks. The trick is not to let there be too much time between sessions so you can maintain the right momentum and flow required to achieve desired outcomes.

2. Redesign sessions and mix them up

Don't just expect that a session plan that works in physical form will translate

perfectly for the virtual world. It won't. Clever session design, that is cognisant of the strengths and limitations of working in a digital space, is more important than ever. And mix it up! Some sessions require synchronous participation, while others (for example, guest presenters) could potentially be pre-recorded. Breakouts can be scheduled at different times to meet the needs of different groups of attendees.

3. Make use of the full digital toolkit

There's an amazing array of tools at our disposal to support effective digital workshops. First and foremost you will need a video conferencing platform to suit your needs, whether it be MS Teams, Webex or Zoom. Making use of a virtual whiteboard to capture your discussions and create engaging activities is also important. MS Teams and Zoom have whiteboard options, but if you are looking for more design functionality and flexibility then apps such as Miro, Mural, or Google Slides are ones we use regularly to create easy-to-navigate templates that everyone can contribute to.

When thinking about audience engagement, and the tools to use for warm-up activities, voting on best ideas, or gathering real-time feedback from the group, we use apps such as Slido or Mentimeter. MS Teams, Webex and Zoom also have simple polling functionality.

By selecting the right mix of tools, you can keep everyone engaged, collaborating, and developing outputs in the right way, for the duration of your workshop sessions.

‘I still think Zoom is the best platform for virtual facilitation – especially for large groups. It has the best break out group functionality (you can set up break out groups quickly during a workshop, or ahead of time), participants rarely lose connection, and the usability of interaction functions like ‘hands up’ is spot on.’ – Jacob

4. Be disciplined

Even more so than usual, it’s important to establish good protocols for participation during a digital workshop. Rules around multitasking must be agreed upon upfront (no side-emails or calls for example), session leaders must be clearly identified, and rules applied for gathering contributions and comments. We also value and encourage all participants to turn their cameras on during our workshops. We like to see people’s faces! It enables stronger connections between both participants and facilitators and keeps everyone on a level playing field.

‘When I can see other people, I draw energy from them. Nothing is more tiring than trying to inject energy in a virtual room where I can’t see the participants.’ – Andrea

Virtual meetings are notoriously difficult if people talk over each other. Structure and process are very important here. Systematic ‘turns around the table’ to allow everyone a chance to speak can be useful; using digital tools to post questions that can then be addressed in an orderly fashion is good too. We also like to build in structured feedback mechanisms – polls or surveys for example – so participants can flag if there are residual issues that need to be addressed in subsequent sessions or offline. And of course – strong, confident facilitators who can bring together the mix of tools, processes and people are key.

5. Be (super) prepared

This is really important for any workshop, and particularly so for a virtual one. Have clear session objectives and structured plans. Run through sessions in advance. Ensure key participants (e.g. CEO, chair, presenters, group captains, co-facilitators) are fully briefed on session structure, materials and tools so there are no surprises, and everyone is clear on their role. It’s frustrating when the technology lets you down, so have a test run on digital tools with everyone in advance, and make sure there’s a back-up plan in the event of a tech melt-down. Have clear expectations for the circulation of outcomes following the session, and make sure these are met.

‘I like to set up a What’s app group for the organising team and for those that have a role during the workshop; being able to communicate easily and rapidly, whilst ‘in session’ is critical.’ – Zoe

6. Beware the hybrid - but don't let it deter you from going ahead!

Hybrid workshops – where some participate virtually, others in person – were considered by some (in pre-COVID times) as a workshop ‘no-no’. However, if done properly, hybrid workshops can definitely be a ‘yes-yes’ ... albeit with some very clear non-negotiables!

Here’s some hybrid workshop advice from Bob Frisch, a valued friend of Right Lane and expert US based workshop facilitator: [What it takes to run a great hybrid meeting](#)

‘I like to set seats aside for participants who aren’t able to attend in person so that there is a physical reminder (for me as the facilitator and for the other participants) to include them.’ – Marc

7. Make it fun

Think about your workshops from the point of view of participants. How do they want to engage? And how can you increase your team spirit and connection?

Theming your materials and using engaging visuals – whether that’s images, graphics, videos, or using a graphic facilitator to help bring your outcomes to life in ‘real time’ – is so important in this virtual setting. As is the use of well-timed energisers and creating opportunities for participants to connect.

Think about opening breakout rooms over the lunch break for people to ‘opt in’ and connect (like a virtual water cooler conversation), or adding time in your agenda for a scavenger hunt or quiz. You might also think about delivering lunch or a special treat to your workshop participants – this is a sure-fire way to make people feel both appreciated and appreciative!

‘I love using virtual graphic recording ... you can see people’s insights presented in a visual way and in real-time.

Participants get excited about being heard and understood and it makes the documenting of outcomes so much more exciting than just words on a page.’

– Jess

By adopting the above practices we can conduct workshops successfully into the realm of remote working, enabling productive collaboration and meaningful discussion with participants in dispersed locations. By working together we can help keep this show on the road.

References

Frisch, B., & Greene, C. (2021). What it takes to run a great hybrid meeting. *Harvard Business Review*. Retrieved from <https://hbr.org/2021/06/what-it-takes-to-run-a-great-hybrid-meeting>

Example of work Right Lane conducted with Moira Shire Council Graphic recording by Jessamy Gee from [Think in colour](#).

Available at <https://www.moira.vic.gov.au/Have-Your-Say/Draft-Community-Vision-We-want-to-hear-your-feedback>



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▶ back to front page

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