



SuZ Miller Overview of Considerations in Virtual Facilitation

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Software Engineering Institute
Carnegie Mellon University
Pittsburgh, PA 15213

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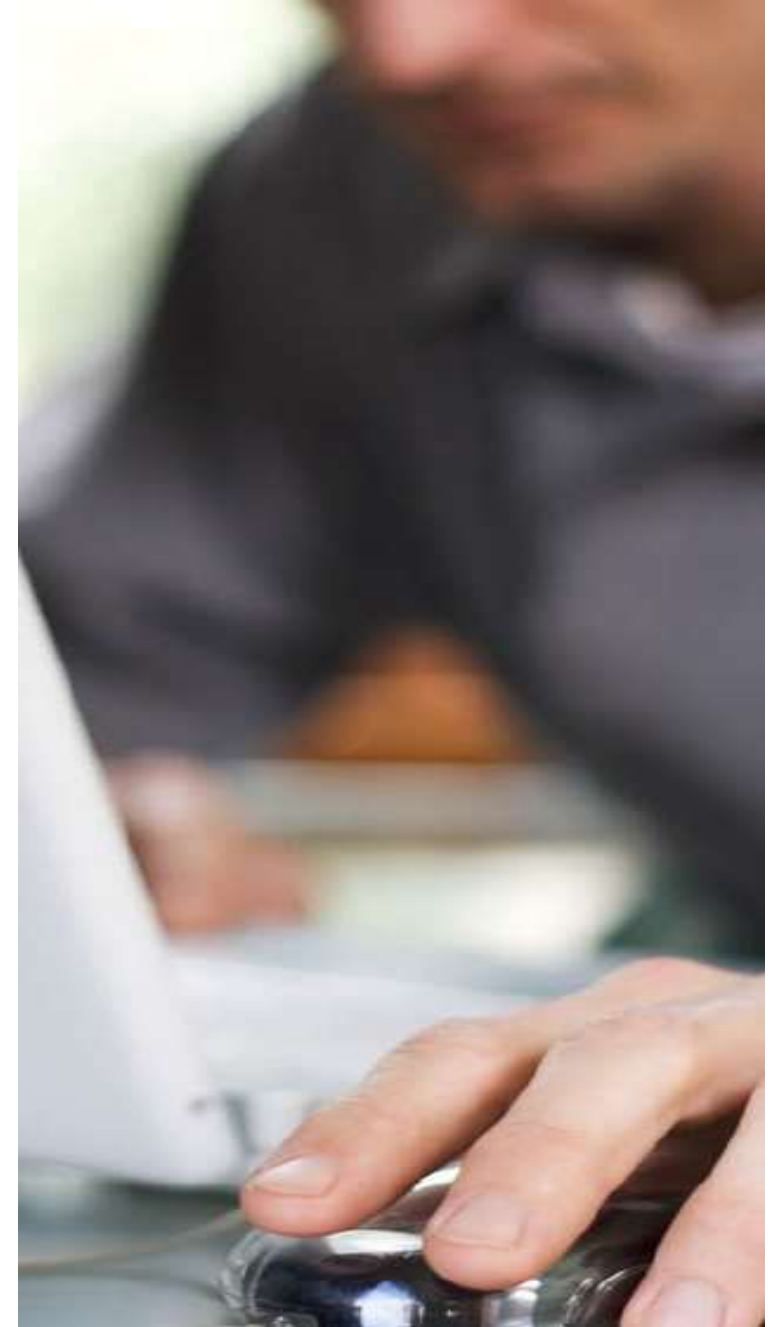
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Random Musings from Recent Experience and Grove's Virtual Facilitation Workshop



Context of “Virtual Meeting” for this Presentation

Meetings where

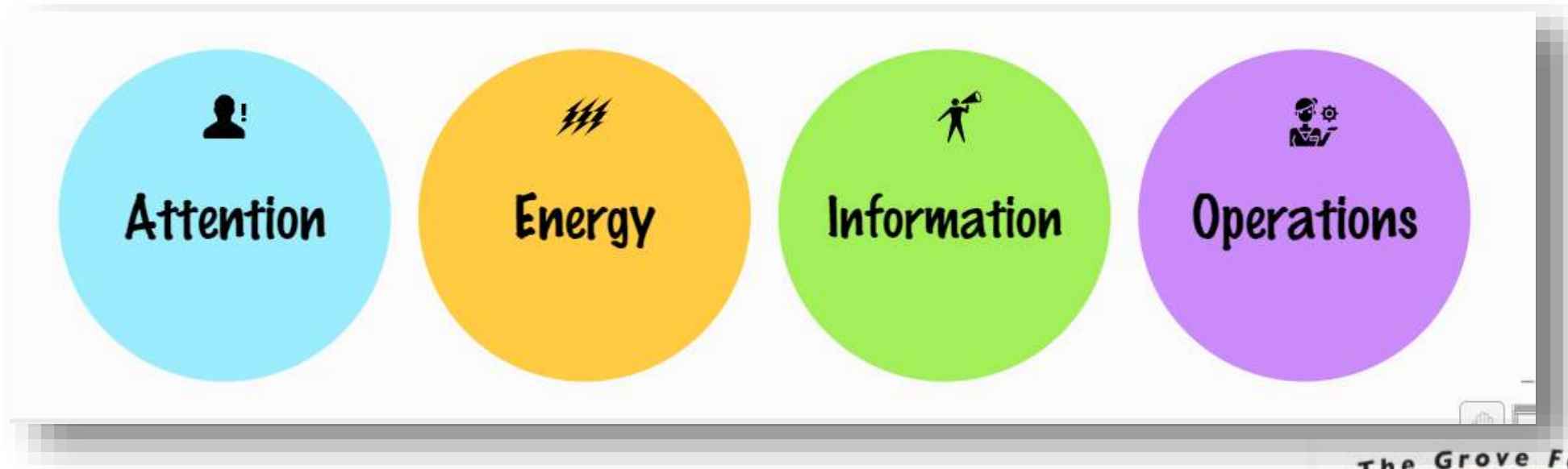
- Information is gathered from participants
- Discussion about the information occurs
- Decisions are made about the meaning of the information
- Decisions are made about course of action
- Actions are committed to

Examples:

- Quarterly (PI) Planning Meetings
- Strategic Planning events
- Retrospectives
- Root Cause Analysis (* Analysis)

The Basic Challenge in Virtual Facilitation

Grove Facilitation Model expresses four “flows” that are critical for managing in facilitated meetings “to do work”



How these flows are managed changes how we design and execute working meetings in virtual space



Technology Matters More in This Setting than In-Person

The “tools” of in person meetings are generally part of our assumed shared infrastructure

- Wall space to put up murals, flip charts or have whiteboards
- Pens, markers, sticky notes, index cards, scissors, tape
- Tables and Chairs
- Humans and their voices, faces, body language
- Extra spaces for breakouts/side bars

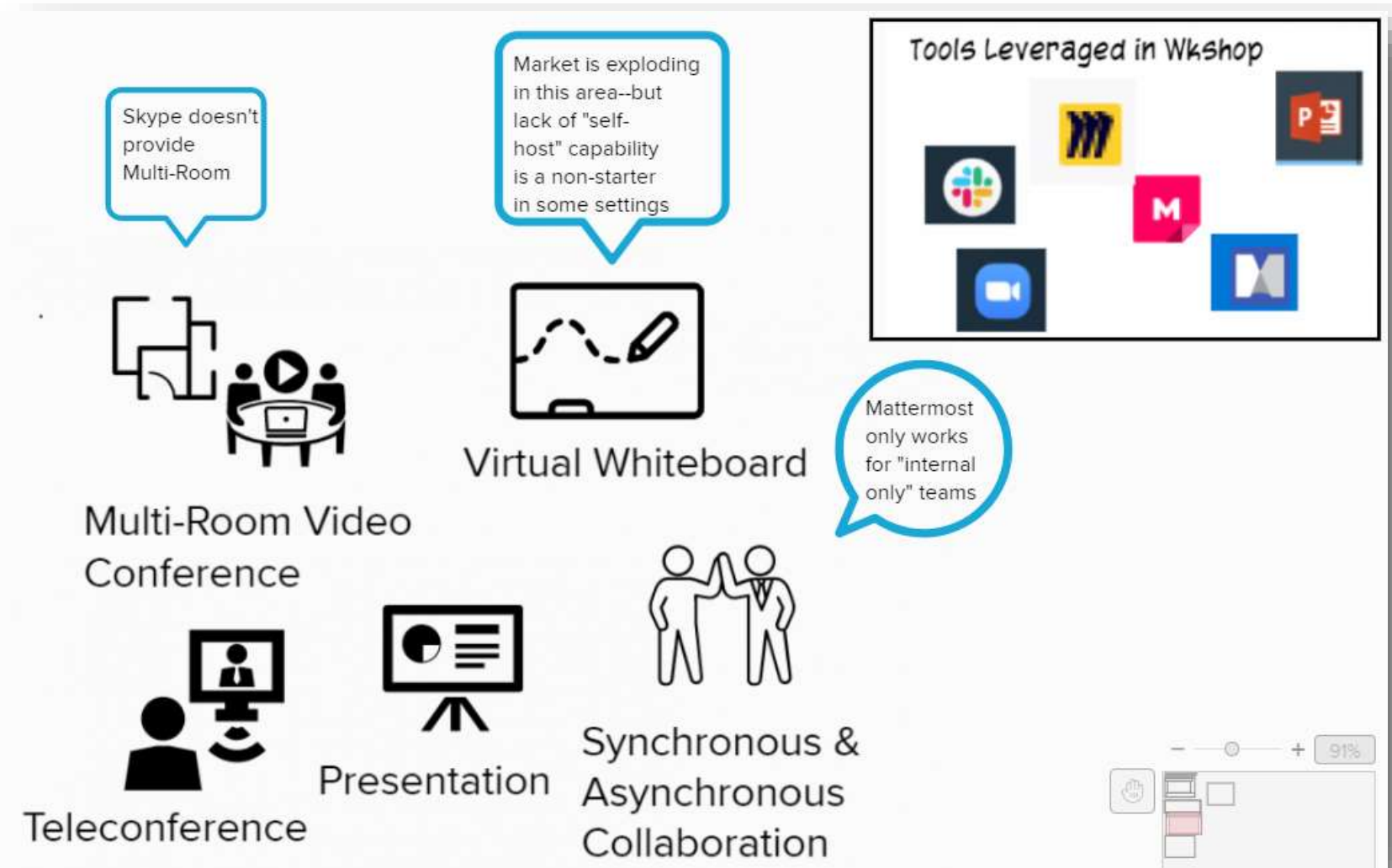
The tools of virtual meetings depend on technologies that are NOT part of our assumed shared infrastructure

- We use them to manage attention, energy, information, and operations
- Some of our attendees are likely to be “technologically disadvantaged”, especially in government settings

Five Categories of Tools Needed to Accomplish Effective Virtual Facilitation

Many settings have some, but not all tools available to all likely meeting participants:

- How many ACG participants have to use Phone/PDF to access our Skype meeting?
- Security definitely impacts usability in this arena!
- *If I was certain everyone could access, I would have used a different tool for this meeting!*



General Comments on Virtual Planning

SEI has participated in or facilitated a few 3 month planning events since quarantine started

- None of them achieved the same results as an in person session, but some were close
- ***PLEASE don't make the "first" planning session together a completely virtual one if you can possibly avoid it!!!!***

SMC FORGE team has captured lessons learned from their experience that we may be able to share with others soon

Vendors of planning and workflow management tools are rushing to show you how "their" tool is the solution to your virtual planning problems

- They tend to focus on the "Information" flow part of the meeting, but ignore Attention, Energy, and Operations
- If you're not already using their tool, "trying it out" for virtual planning is a bad idea!

Strategies and Tactics That Help with Virtual Planning-1

Redundancy, redundancy, redundancy

- Have a plan for EVERY technology you are intending to use to fail
 - For some things, like “no internet”, reschedule is a valid backup plan!
- At least TWO facilitators for meetings of any size complexity
 - While one is “running” the main activity, second can monitor a sidebar chat area (yes, you need one of those!!!) for participant technology and procedural questions
- Multi-room videoconferencing for planning meetings is a must if you are going to have multiple teams working at once
 - Really unsatisfactory backup is phone conference lines assigned to each group for breakout, and a separate one for “main room” activities
 - Really difficult to get groups to reassemble back to the main room with this tactic
- Practice, practice, practice!
 - Rehearse the meeting with friendly faces who are willing to try and “break” your plan well enough before the meeting that you can put mitigations in place

Strategies and Tactics-2

Keep synchronous working sessions to 2 hours or less

- Video fatigue is real
- Tool learning issues are real
- Cognitive load for this kind of work is higher than in person
- Note: the Virtual Facilitation Workshop was conducted in 5 2 hour sessions over the course of one week

Note that, in some settings, you can expand the “data gathering” aperture by allowing asynchronous data gathering to occur in between the synchronous working sessions

- This can sometimes enrich the data gathering by allowing people
 - That would normally *not* be present in an inperson meeting to participate
 - That appreciate extra time to “think through” questions before posting their response
- Depending on asynchronous participation, this could reduce the time to reach decisions during the virtual meeting

Explicitly Translate Activities from In-Person to Virtual

Different in person activities have different implications for Virtual Implementation

Translation Canvas

Activity Goal and Context	Activity Constraints	Candidate Virtual Techniques	Potential Pitfalls	Prototype Technique Notes
	Favored In Person Techniques		Dry Run Feedback	
Flow Considerations (Attention, Energy, Information, Operations)			Facilitation Model Considerations	

Let's Try This!

SuZ has set up a Mural board that accepts Anonymous participants. You are invited to participate in a data gathering/voting session on the question:

→What are your biggest challenges in facilitating or leading virtual meeting?

<https://app.mural.co/t/suzsandbox9435/m/suzsandbox9435/1589978274159/f10de68932a144a30b8d62269efe35615ab38c90>