Top tips for virtual meetings and events

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Deck 3 – designing a meeting /event

“Almost all forms of meeting and interaction can be moved to a virtual format with no loss of effectiveness, if trust and good relationships are established and sustained.

Joe Nandhakumar and Richard Baskerville

Trusting Online: Nurturing Trust in Virtual Teams

Roles

- For any virtual meeting or event we advise you have:
  - Design team to co-create the meeting/event

  - On the day:
    - Facilitator
    - Technical Host (looking after all technical aspects)
    - Presenter (could be the same person as the facilitator)
    - Chat box monitor

    - You may also wish to have a Social media monitor – To carry out the same role as the chat monitor but with whichever social media you're using.

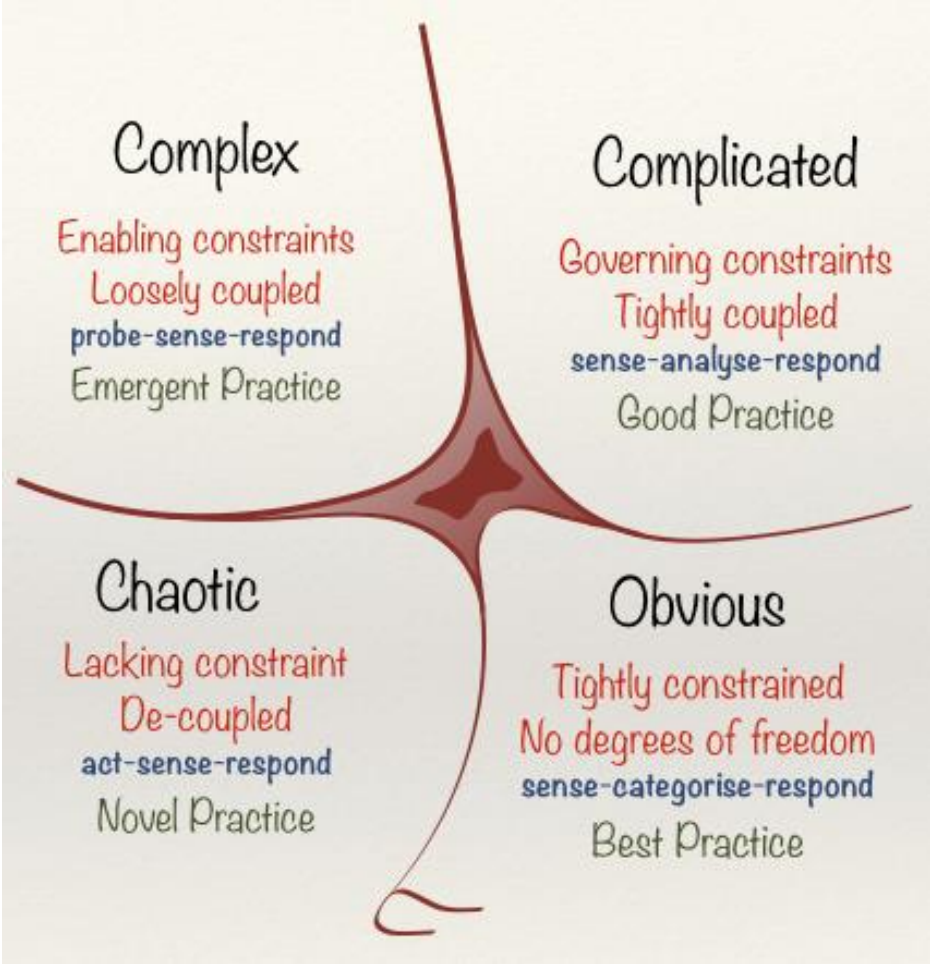
Other roles to consider when running a session

- **Host** – Someone to set up and run the technicalities for the session
- **Facilitator** – Someone to introduce the presenter and facilitate the virtual meeting
- **Presenter/Speaker** – Whoever will be presenting (Can be more than one person)
- **Chat room monitor** – To engage with the audience through the Webinar's interactivity and feedback to the chair/presenter at scheduled times
- **Social media monitor** – To carry out the same role as the chat monitor but with whichever social media you use
- **Secondary host** – Back-up to the primary host just in case they can't launch the virtual meeting, they are on standby just in case the host can't launch the virtual meeting. The host and back up should not be located in the same building/space just in case there are connectivity issues.
- **Support role** – To be ready to step into any role should there be an issue
- **Minute/Note taker** – If you record the session this role may be unnecessary

Purpose

- Be clear about what you want to achieve:
  - Sharing information
  - Gaining commitment
  - Building networks
  - Gaining insight
  - Solving a complex problem
  - Solving local issues or large scale change issues

Using the Cynefin framework to think about session purpose & design…



This is an outline of the Cynefin framework. It describes different types of challenge:

Obvious – the challenge once categorised can be solved by applying best practice.

Complicated – the challenge requires expert analysis and once solved good practice approaches can be used to replicate the solution

Complex – the challenge is unlikely to be well understood and needs to be probed to make sense of the situation before responding

Chaotic – the priority is to act and learn what is working and respond accordingly.

The type of sessions we might need to provide need to take account of the nature of the challenge.

Basic session design

- Welcome, intros and check in
- Overview of the technology if required (where's the mute button, camera on etc.)
- Opening activity – chat box, annotation, poll
- Presenter – short content with interaction
- Interaction – polls, discussion groups in breakout rooms, annotation, chat box etc.
- Breaks if longer that 90mins
- Closing activity

When people join your session…

- Encourage people to connect their audio and video – interactions with a camera on strengthens engagement, relationships, trust and is just so much easier to facilitate.

- Talk people through how to find the mute and unmute button (to reduce interference) and ask them to interact in the chat box.

Our agenda

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As you would with a face to face meeting, include a meeting agenda at the beginning of your session.

NHS Horizons team today…

#hello my name is…

In the welcome and introductions, we like to have a slide to visually show who are part of the team leading the session…

Helen Bevan
Chief Transformation Officer

Zoe Lord
Deputy Director

Pardeep Bains
Programme Manager

Paul Woodley
Programme Manager

A useful graphic to use at the beginning of a session…

A useful graphic to use at the beginning of a session…

DO-NOW

Welcome!

TODAY'S DO-NOW:

Please begin once you are connected to the audio & video conference.

1 REMOVE ONE DISTRACTION FROM YOUR WORKSPACE. YOU MIGHT:

2 WRITE A BRIEF STATEMENT of PURPOSE — one intention for today's session.
(This will remain private to you.)

3 POST it, HANG it, or PLACE it WHERE YOU WILL SEE IT.

Twitter: #VirtualCollaborate @HorizonsNHS

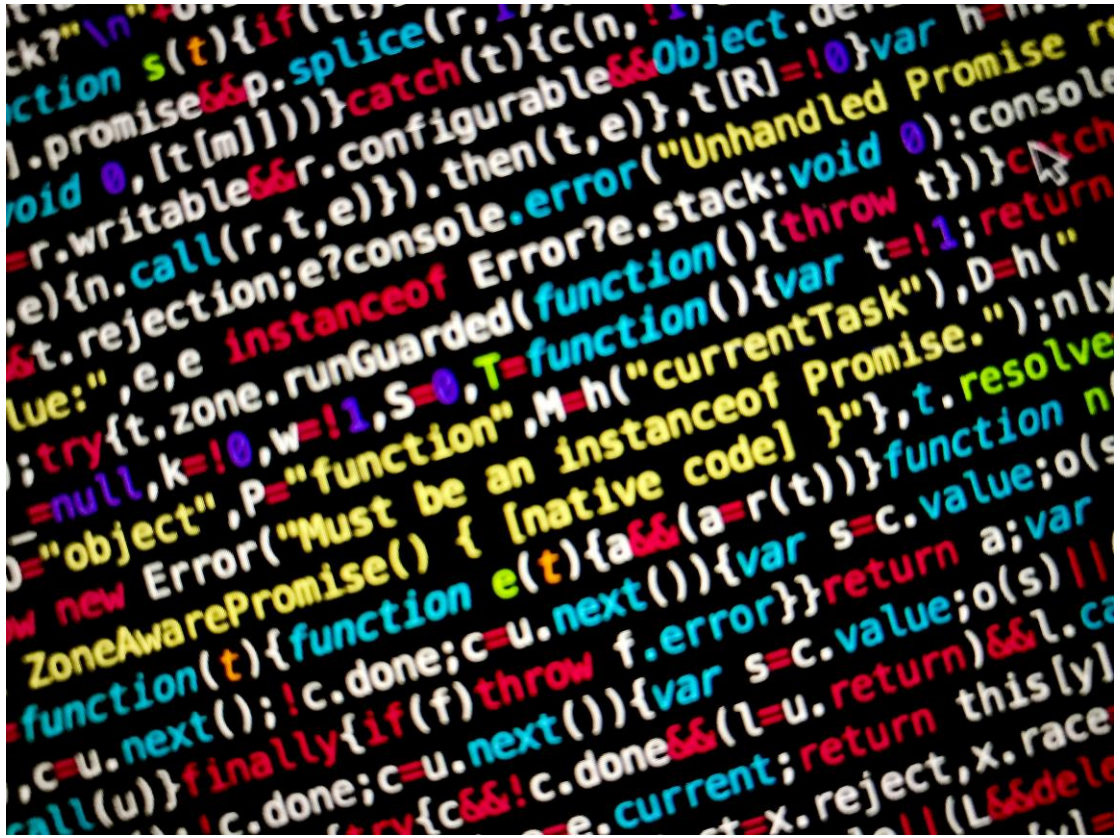
Top tips

- Interactivity builds energy and engagement
- Think about using the chat box, polls and annotation to gather information and introduce interactivity
- Encourage people to use the chat box to share thoughts, comments or ask questions
- Provide short pauses for people to think of their own experience
- Help participants frame their thinking by focusing on key actions to take away.
- Great graphics help to engage an audience – unsplash.com is where you can find free images.

Using visual images.
Unsplash is a source of freely usable images.

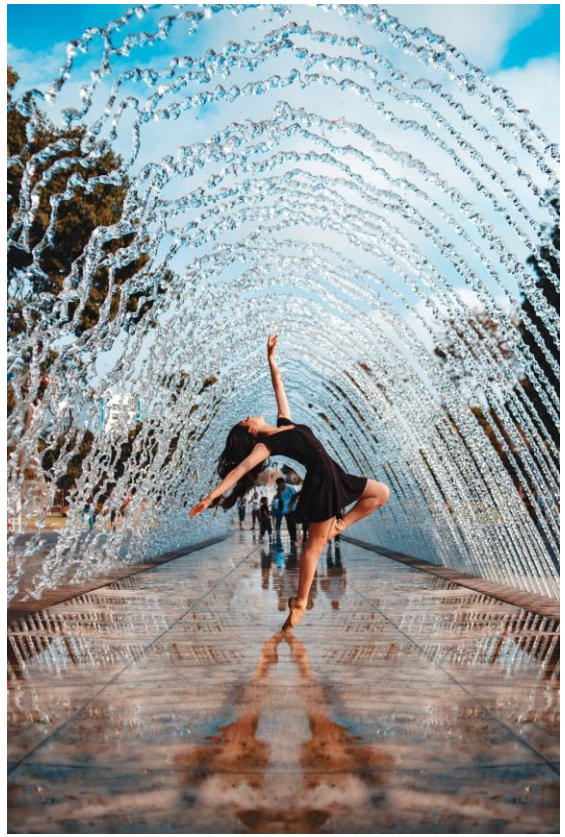
No one likes a slide full of words…

(Photo by Max Chen on Unsplash)



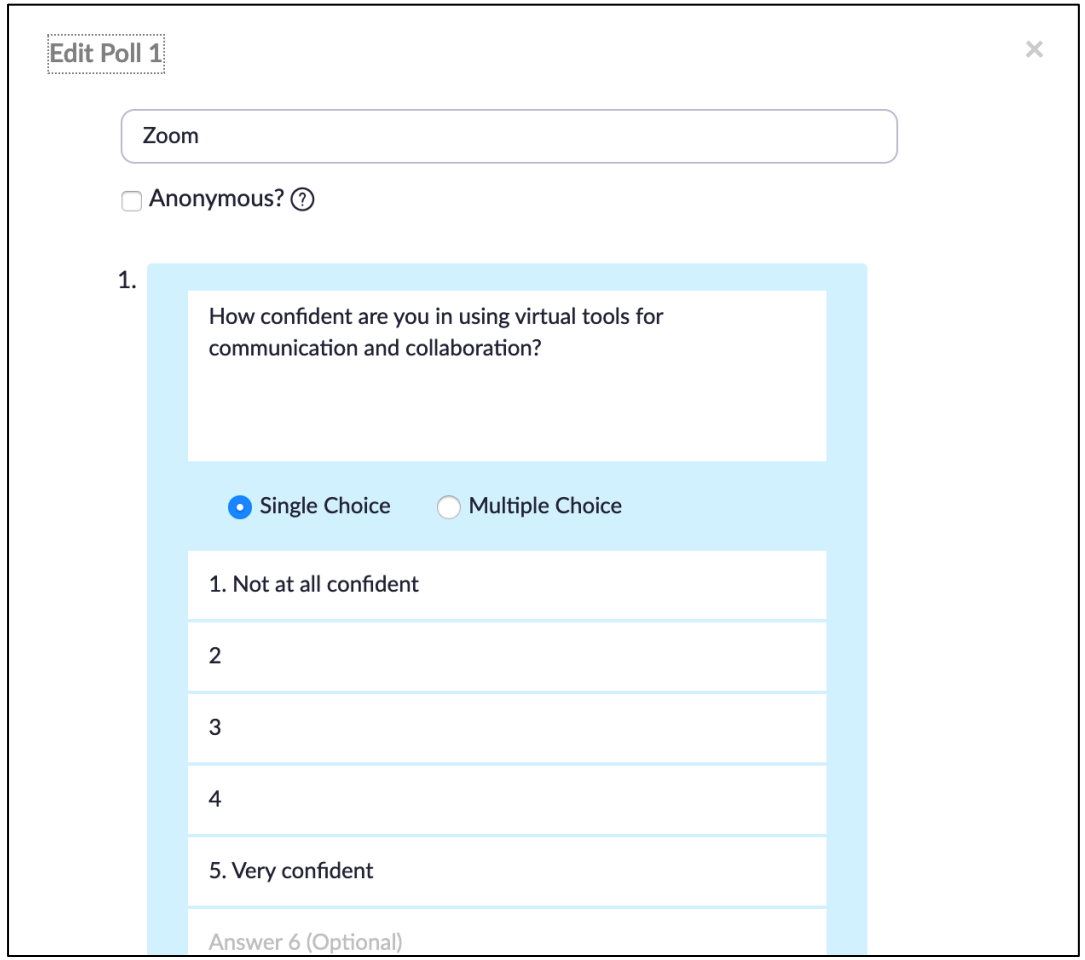
Think about using photos that encapsulate your messages…

(Photo by JoelValve on Unsplash)

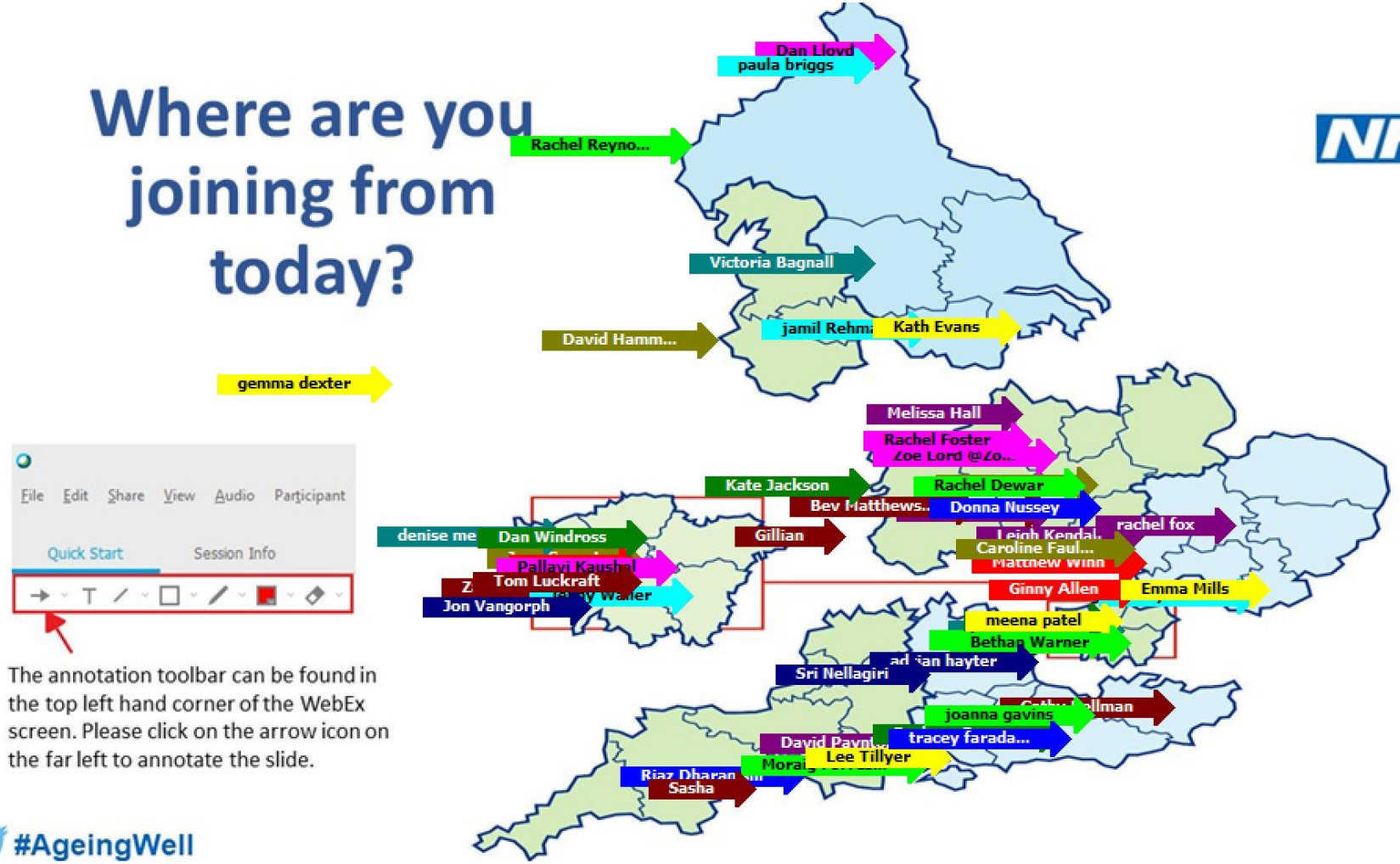


Polls

- The polling functionality can increase engagement and energy in your session.



Annotation tools



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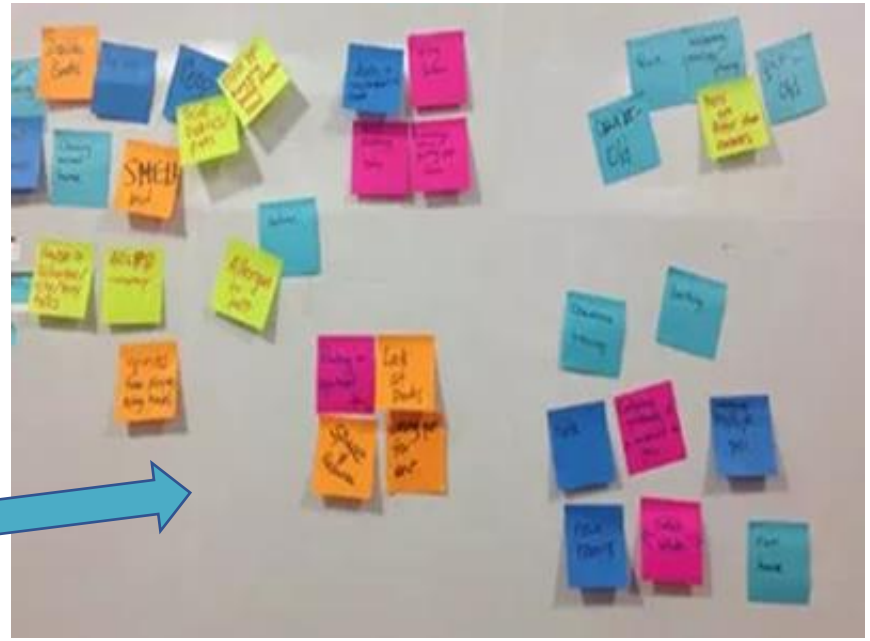
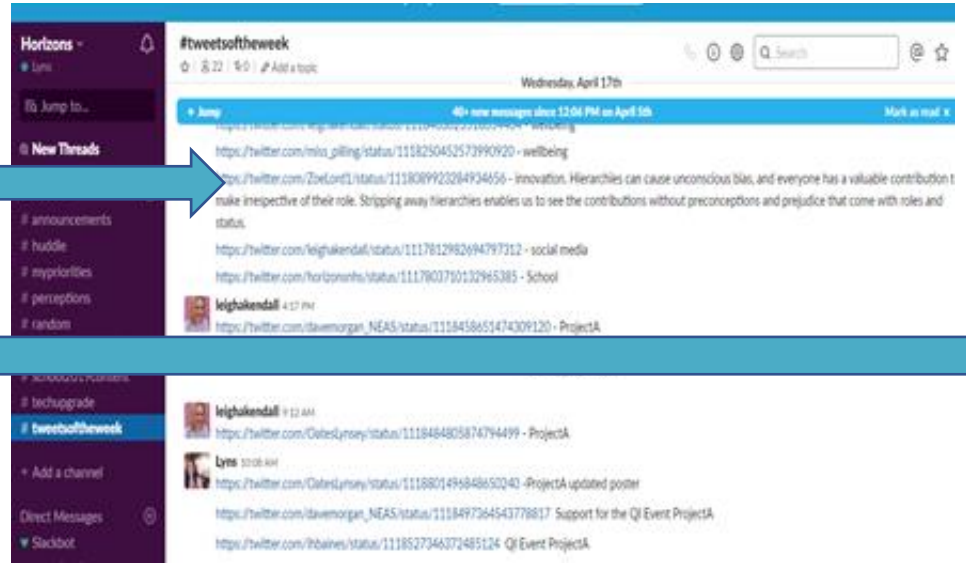
Breakout Rooms

Breakout room functionality enables smaller group conversations…

You can also use other tools as part of your session. The Horizons team use multiple virtual collaboration tools. Some examples:

- Trello: agile project management board
- Stormboard: a virtual interactive notice board
- Slack: comms tool
- Basecamp for project management





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Breaks

- Just as you would have breaks in a face to face meeting, it's important to give people comfort breaks and time away from there screens.
- It's advisable that if any meeting is longer than 90 mins you should give participants (and yourselves) at least a 10 min break.

Closing a session

- Closing your session is just as important as starting your session.
- Options:
  - Check out activity in the chat box
    - How are people feeling after the session
    - What went well / even better if
    - Ideas for the next session
    - Individual actions that people are taking away
  - Polls/Annotations – you might want to finish with the same poll you stated with
  - Verbal check out – one sentence each if you have a big group!
- Share next steps
- Share contact details

Follow up

- It’s good practice to have a pre written email to participants before the session.
- You may wish to circulate slides, the recording and chat box content.
- Key actions and next steps.

This pack has been brought to you by the NHS Horizons team.

For more information contact:
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