

Virtual Session Process

Considerations

- Virtual sessions are the exception vs the rule - In-person meetings are always best.
- Virtual Sessions for high travel costs or travel restrictions.
- Historically no drop off in session quality; session ratings are the same.
- Stay within The Meeting Pulse™ vs delaying or cancelling.

Best Practices

- *All for One and One for All*
 - One person remote, everyone remote.
- *Have snacks and take breaks*
 - Breaks every hour, keep camera and audio on.
 - Snacks within reach.
 - Take lunch together on video, chit chat about non-work things.
- *Use a Shared Workspace for collaborative real-time writing*
 - Meeting should be documented in an easy format we all have access to (e.g. GoogleDocs, Microsoft OneNote).
 - Facilitators can still use whiteboard solutions.
- *Use Pen and Paper*
 - All have pen and paper handy.
 - Share notes by taking a photo and uploading to shared document, continue “3 quiet minutes” protocol.
 - Continue use of Leadership Training Manuals and the tools in the EOS Toolbox™.

The Stack

Required Technology	Optional Technology
<ul style="list-style-type: none">• WiFi/Hard Wired Ethernet of at least 100 MBPS• MacBook Pro (or sufficiently powerful computer)• Google Docs (or equivalent)• Zoom Conferencing (or equivalent)• Uberconference (in case bandwidth is low)• All session reference materials (PPTs, Asana, EOS Tools, Traction Tools, Ninety.io)• Pen and Paper• Snacks• Leadership Training Manuals (LTMs)• Backup Hotspot (Smartphone hotspot or alternative)	<ul style="list-style-type: none">• 32” External Screen (we use 2 55” screens - one for faces one for content)• iPad Pro w/ Lightening Cable• Apple Pencil• Microsoft OneNote (or equivalent)

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The Process

1. Send out Zoom Conference invitation to all attendees
2. Approximately 1-week prior to the session have an assistant schedule a pre-test call with each participant.
 1. Ensure Zoom is properly installed and working with audio and video
 2. Test bandwidth for both audio and video presentation (should have no choppiness or lag)
 3. Make sure the participant has headphones (noise cancelling preferred)
 4. Have each participant run a speed test on their connection (speedtest.net) – look for 100 MBPS or better
3. Set up an Uberconference event in case bandwidth can't handle both audio and video.
4. Test all reference material files needed for the session - have them open on your computer prior to the session.
5. Re-test all connections 30 minutes prior to session start
6. [Test iPad connection to Zoom](#)
7. Place video stream of participant faces on external 32"+ screen.
8. Share PPT or GoogleDoc with Objectives/Agenda on laptop screen.
9. When white boarding electronically, use MicroSoft OneNote (or alternative) that is shared with the team
 1. This allows you to have all the session notes in a single note
10. Take breaks every 1 hour for 5-10 minutes and 30 minutes for lunch
 1. Working lunches don't work, chewing noises + technology makes working lunch low quality
11. Wear pants

Virtual Facilitation Tips

Core facilitation skills are the same in-person or virtual with some minor changes.

1. Go verbal – you can't see when people are finished writing – you need to ask when people are finished
2. Master Thumbs Up – have people give a “thumbs up” when they are done or good with the conversation.
3. Instead of “start with the brave one and go left” – you need to call on who starts and facilitate the order of the conversation – recommend using the order of appearance on the screen.
4. Unshare content to allow people to see one another better during conversations.
5. Use the LTM and pen and paper same as in an in-person session.
6. Assign a person to keep all our ToDo's on a shared document that has all your session content

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7. Position your camera so you can facilitate on a physical whiteboard if possible – otherwise use the electronic tablet and pencil