YOU’RE ON!

Strategies for Engaging and Effective Virtual Meetings
UNDERSTANDING THE VIRTUAL & USING TOOLS

With Margo Reid, Partner Consultant, Capacity Partners

While You’re Waiting: In the chat box
Tell us SOMETHING NEW you’ve done since the pandemic began.
Virtual Work: Goals

1. Appreciate WHY virtual is different
2. Learn beyond-basic Zoom tools
3. Hone your preparation skills for the virtual
Who’s in the Room? In one word or phrase: What is most frustrating about zoom meetings for you?

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Please mute your mics if you are not speaking.

Remove one distraction:
- *turn off notifications
- *put phone away
- *close the door
- *turn off the TV
- *let the cat out
- *ask someone to watch the kids

Do meeting work only.

Be brief.

Have pen and paper at hand if you like.

Contribute:
- “Raise Hand” Go to Participants & click Raise Hand
- “Chat” window for questions
Poll #1
Length of a Session

What is the optimal length of time for a virtual session?

• 10 minutes
• 30 minutes
• 60 minutes
• 90 minutes
• 2 hours
Beyond the Basics

Connecting
- Polling
- Round Robin

Collaborating
- White Board
- Color-Coded Google Doc
- Google Sheets Flip Chart Carousel

- Muting
- Using Reactions
- Chat box
- Viewing
What’s So Different

• Zoom fatigue
• Optimal time of a virtual session
  o POLL results
What’s So Different

• Why do engagement strategies matter?
  • Elephant and Rider

• Senses used in receiving messages
  • 75 percent of knowledge comes to us visually
  • 13 percent comes through hearing
  • 12 percent comes through smell, taste and touch
The Elephant and the Rider
Connecting and Collaborating

Who would you bet on?
How to engage the Elephant and the Rider

Connecting
- Round Robin
- Polling

Collaborating
- White Board
- Color-Coded Google Doc
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“Breakout rooms, with specific tasks or topics assigned to different groups, provide a psychologically safe space to test ideas and build relationships. When participants return to the large group, they find it easier to report ideas from the small group with the confidence that comes from testing and sharing perspectives in that relatively safer space.”

Amy C. Edmondson and Gene Daley
HBR article on Psychological Safety in Virtual Spaces
Connecting and Collaborating

Connecting
  - Round Robin
  - Polling

Collaborating
  - White Board
  - Color-Coded Google Doc
  - Google Sheets Flip Chart Carousel
Collaborating: Google Docs—Color-Coded

**BREAKOUT #1 BLUE, GOLD, GREEN, PURPLE GROUPS**

**BLUE:**
How has COVID-19 changed the way we work?

1. We all work remotely
2. Unable to meet providers/people part of coalition in person
3. Flexibility with our partners
4. Due to COVID, we are working closely with the network to offer more resources that are not just based on ESOL
5. More meetings/sending more information
6. Everybody needs a haircut

**Gold:**
What are the most important services your organization provides?

1. Funding
2. Training
3. Networking Opportunities
4. Advocacy
5. Data Aggregation & Reporting
Designing for Virtual: Guiding Principles

GENERAL GUIDELINES

• Plan your virtual details (Round Robin, Polls, Breakout Groups)
• Have meaningful engagement every 7–15 minutes
• Give details, model directions
• Don’t forget to ask for questions and feedback

GUIDELINES FOR BREAKOUT GROUPS

• Do the first assignment as a group; model how to do the task
• Assign a leader
• Give final directions
• Monitor progress
• Report back—using collaborative documents
Collaborating: Google Sheets
Flip Chart Carousel

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YOU HAVE 8 MINUTES
ENCOURAGE ALL MEMBERS OF YOUR GROUP TO RESPOND
TASK ONE MEMBER TO Scribe, ONE TO LEAD, ONE TO WATCH TIME
CONCLUSIONS & FEEDBACK

1. Appreciate WHY virtual is different
2. Learn beyond-basic Zoom tools
3. Hone your preparation skills for the virtual

“Honor the brain by paying attention to breaks and emotions”

~Christine Comaford, Forbes
In one word or phrase: How do you feel about your ability to improve your Zoom meetings after this session?

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Contact us for

• Strategic Planning
• Fundraising
• Board Development
• Management Consulting
• Executive Coaching

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