THE GROVE
CONSULTANTS INTERNATIONAL

Virtual Meeting Planning

OBJECTIVE: Understand how to incorporate technology considerations in your virtual meeting preparation.

This practice is a variation on The Grove's classic OARRs (**O**utcome, **A**genda, **R**oles, **R**ules) with the addition of technology. As with any meeting, determining outcomes is the first critical step. With virtual meetings the facilitator must consider technology when planning the agenda, roles and rules. Due to the nature of virtual collaboration, extra care needs to be taken to create engaging activities that involve all participants. Make technology work for the group rather than making the group work for the technology.

SAMPLE AGENDA

- Welcome/OARRs   10 min.
  — TECH: Screen-sharing in video conference
- Introductions   15 min.
  — TECH: Video conferencing

  TECH TRANSITION   5 min.
- Brainstorm Opportunities   45 min.
  — TECH: Shared Sticky Note Tool

  TECH TRANSITION   5 min.
- Next Steps   10 min.
  — TECH: Shared slide in video conference

SAMPLE OUTCOMES

- Get to know each other.
- Identify near-term opportunities.
- Agree on next steps.
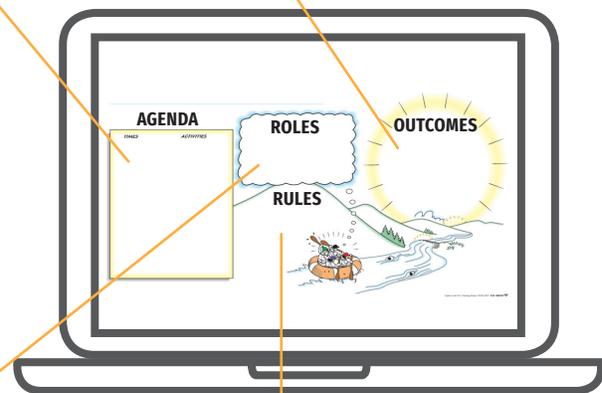
SAMPLE ROLES

- FACILITATOR: Manages process, encourages participation.
- PARTICIPANTS: Build on each other's ideas, ask questions, support group learning.
- TECH SUPPORT: Supports the group with technology flow and resolves issues.

SAMPLE RULES

- Make space for all voices.
- All ideas are accepted; none are invalidated.
- Enjoy the digital, visual adventure, and be patient with the technology.
- If technical difficulty arises, contact Tech Support directly via chat or email.
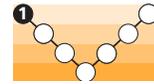
Pre-Meeting Planning Steps

1. **OUTCOMES**: As with face-to-face meetings, defining your desired meeting outcomes is the first key step. What needs to be accomplished for the time to be well spent? Create and refine your list of outcomes with meeting sponsors or key stakeholders.

2. **AGENDA**: An agenda orients participants to the overall process. When designing your agenda, you need to account for factors specific to meeting virtually.

    *   TIME: Match your outcomes with the time allotted. If you are trying to accomplish too many outcomes in too little time, then break the outcomes up into multiple sessions.

    *   ACTIVITIES: Consider activities that will drive the group to the desired outcomes and will allow for all meeting participants to engage, both introverts and extroverts. Explore multiple ways to engage the group, such as asking an open-ended question to the whole group, individual responses to a question, time for individual reflection, whole-group brainstorming, and small-group conversations.

    *   TOOLS: Choose tools that will support your participants and your outcomes. For example, if you want the group to engage in a brainstorm and prioritize ideas, then choose a tool that allows people to contribute at the same time and vote on ideas generated. Always test your tools ahead of time and have alternate tools available in case of technical difficulty.

    *   TRANSITIONS: Plan how you will move the group from one process/tool to the other. For example, when planning to shift to another tool, write clear instructions and prepare to share them with participants on screen as you walk through them. Be prepared to answer any questions. Allow enough time in your agenda to make these transitions.

3. **ROLES**: Making roles explicit helps participants understand how each person in the meeting will be functioning and gives the facilitator more control. Tech support is a critical consideration in virtual meetings. In the best case, you will have one person facilitating the process, and another person supporting the technology. Regardless of your situation be clear about who is doing what so people know who to contact without disrupting the entire group.

4. **RULES**: Draft groundrules in a positive frame that will steer people toward engaged participation. Groundrules about behavior as well as technology will help prevent problems in the meeting. For example, for virtual meetings, it is good to set a groundrule about patience with potential technology malfunctions.

At the Beginning of the Meeting

5. Introduce your OARRs with the group and explain how it will be used to guide the process. See The Grove's *Meeting Startup Leader's Guide* for more information.