Design Principles

Designing and facilitating engaging and effective virtual meetings

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Why do we need minimum standards for Virtual Meetings?

Virtual meetings and engagements can be effective ways to collaborate. With the sudden increase of virtual engagements due to COVID 19 we felt it would be important to give some clear indication of what we believe are minimum standards for the design and facilitation of virtual meetings, workshops or engagements. These engagements can range from small group meeting to virtual training events or large plenary / broadcast events.

We hope that these design standards can inspire more engaging and effective virtual meetings.

What is necessary?

1. Clear design of the process: It is crucial to design the process with clear learning objectives in mind. Logical sequencing of activities and good flow are crucial and should be considered in the design phase. It is also important to consider time and resourcing to ensure sound delivery of the event

2. Consider your audience: From the start of the planning process, this should focus on contents (what would this audience find interesting/ relevant) and digital capacity. A well designed and facilitated process shows respect for its participants, and the time and engagement they are giving to the process.

3. Effective facilitation: Facilitating virtual events requires facilitation skills and is more challenging as we are dealing with time lags and often delayed or absent visuals. Creating an environment that makes participants feel safe and heard is important – and this is enabled by effective facilitation. This includes actively listening to what is said, summarizing decision points or action items in an on-going manner, and managing the process. Effective facilitation also includes being familiar with the technology – and being able to support participants in using the technology without frustration.

4. Flexibility is crucial: Facilitating virtual meetings always requires flexibility and thus will require a good team (with clearly defined roles and responsibilities) to address potential challenges or needed course corrections. This means that spaces should be designed with shared principles, open leadership, and opportunities to collaborate.

5. Learn effectively from success and failure: Reflection on the event and documenting lessons learnt are crucial to debrief with the team and to improve future processes. These reflections can provide participants with an opportunity to make recommendations for future learning events.

What are important additions that will make meetings Virtually Amazing?

6. Maximize interaction and engagement: Virtual processes are removed from the actual reality of the environment of the participants and it is thus important to maximize personal engagement and interaction between them. This requires careful design considering the learning objective and audience. We also need to consider the size of the group and thus some processes might be more appropriate to smaller/ larger groups and different types of processes. Short turn taking, and surprising processes keep participants engaged and can generate enthusiasm for the topic.

7. Enable creativity: Engaging agendas can include elements of surprise and invite participants to take small risks during the process. Carefully crafted processes enable participants' creativity, and thus contribute towards an inspiring event. Of course, it is important to provide an opt-out version (as in face to face meetings) to allow for a safe space at the same time.

8. Creating a virtual sense of community: engaging virtually can often make participants feel removed and disconnected. The design of the process should therefore consider how to create a sense of community in the process. Bringing personal or physical aspects into the meeting process can help. They can bring a sense of proximity to participants the meeting.

Creating engaging and effective virtual dialogue
Virtual dialogue is supported by effective technology, a sound process design, and skilled facilitation. If you feel you would like to discuss the above further, please feel free to reach out to our team.

Further reading
So You Want to Host a Web Meeting? By Nancy White, with Pete Cranston, Susan Stewart and Bonnie Koenig

Getting in touch:

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