

8 RESOURCES FOR MORE

EFFECTIVE VIRTUAL CONVERSATIONS



Worksheets

Video

Transcript

Checklist

The Heart of Coaching Giveaway 2018

8 Resources for More Effective Virtual Conversations: Webinars,
Virtual Retreats, Virtual Group and Team Coaching

Welcome to the
Heart of Coaching 2018 Curated Collection of Virtual Resources



With Jennifer Britton

Ready to start your online adventure?

From Webinars, to Facebook Live to extended virtual and team conversations online, virtual events continue to expand. This curated collection of resources for this year's Heart of Coaching includes several items across the phases of planning and marketing your next virtual event.

Thanks for accessing this digital resource!

Jenn

Jennifer Britton – Potentials Realized | Effective Virtual Conversations

Excerpt	The Business Case for Virtual Work
Planning Sheet	What could your virtual programming look like?
Transcript	Getting Ready for Blast-off – Pre-program Planning for Virtual Calls (Effective Virtual Conversations Call – November 6, 2017)
Template	Virtual Session Checklist
Video	Marketing Your Virtual Group
Worksheet	Marketing for Your Virtual Group
Worksheet	2018 Content Calendar
Exercise	Working with Virtual Cards
	About Jennifer, Potentials Realized and Effective Virtual Conversations

The following comes from My latest book, **Effective Virtual Conversations**. It's likely that you may get asked "Why Virtual?". Here's what I write:

" In 2011, \$35.6 billion dollars was spent on self-paced eLearning around the globe. By 2014 it was a \$56.2 billion industry, set to double by 2016. While there have been declines in self-paced e-learning, blended learning approaches which incorporate live and digital e-learning have become increasingly popular.ⁱ

Globally, it is estimated that \$39 billion is spent on meetings every year. In July 2012, it was estimated by cNBC that every adult in the US spent 388 minutes, or almost 6.5 hours, each month on social media.ⁱⁱ

With so much time spent in meetings, in teamwork, and in conversation in the virtual space, isn't it important to take time to make our virtual conversations more effective and engaging? Here's where this book comes in—as a conversation starter and as a reference and go-to primer.

To many, the virtual world can be seen as a time-sucker—but it has become an important channel for communication. The world has become a smaller place in the last decade and that is not going to change. Even with a push to greater nationalism across Europe and parts of North America, many organizations remain global in scope and excel due to the sharing of ideas, and conversations, across geography. If physical movement of talent becomes hindered, virtual conversations will fill the void.

WHY IS THIS IMPORTANT?

There are many reasons why it is important to take a look at virtual conversations, teamwork and learning, namely:

The Move to Just-in-Time or Real Time Processes – We live in an era of immediate gratification. Recent research points to the "Uber effect," which is the ability to acquire anything real time or just-in-time. This is changing the landscape of what is seen as "effective" in the learning space by professionals. Learners and other professionals are asking, "If I need it now, why shouldn't I be able to get it or access it right away?" On-demand and mobile platforms offer this real-time learning. Internet-based work allows for us to connect and work real-time, no longer necessitating long travel or delays in our collaborative spaces.

Time Efficiency – Virtual approaches provide many benefits in terms of time and budget. They provide a reduction in the amount of time people need to spend away from the office to engage in learning. Why travel if you don't have to?

Reduction of the Carbon Footprint (Eco-Friendliness) – Britain's Open University found that e-learning consumes 90% less energy than traditional courses. They found that the amount of CO2 emissions (per student) is also reduced by up to 85%.ⁱⁱⁱ

Bringing Expertise Together – Virtual conversations and learning allow you to collaborate and learn from the best across time differences. These peer partnerships span geographic boundaries, changing the way we see the world, how we share information and what we create.

Bringing Peers Together from a Wider Cross-Section – The virtual space allows us to connect people from around the world in similar passions. With Zoom and other video-streaming meeting services, virtual meetings sometimes feel as if we are across the table from each other in terms of our ability to see each other and engage in real-time conversation.

Real-time Learning – With the advent of mobile technologies, smart devices bring conversations and learning to us immediately—from the office to commuting, our phones have created a new window to the conversation and learning ecosystem.

WHY VIRTUAL LEARNING?

Many companies are leveraging virtual learning for a number of reasons including:

- Reducing travel and associated costs
- Supplementing learning experiences for global teams
- Fostering cross-sectoral and cross-functional learning across the organization, or locations
- Reducing the cost of meetings
- Saving time from travel
- Reducing their carbon footprint

Excerpt: Effective Virtual Conversations, pages 6-7, Jennifer Britton, 2017. All Rights Reserved.

If you are interested in reading more, download this excerpt of Chapters 1 and 4 of the book. You can access it at:

http://www.effectivevirtualconversations.com/uploads/1/9/9/2/19920499/excerpt_of_effective_virtual_conversations.pdf

12 THINGS TO KEEP IN MIND WHEN YOU MOVE TO VIRTUAL PROGRAMMING



Page | 4 While there is a myriad of things to keep in mind when running a virtual program (webinar, virtual group or team coaching call, video-based program), here are 12 things I usually invite new coaches, facilitators and trainers to the virtual space, to think about.

1. It usually takes more time than you think.
2. Keep it simple, not simplistic
3. Expect the unexpected – the unexpected will often happen – whether it’s tech challenges or someone can’t get on, or....
4. Consider how processes can support your work.
5. Use Visual Anchor points to help focus the conversation.
6. Prepare and practice so you know the platform, you know your content or roadmap of the call.
7. Connect with your group/team as early as possible. Adjust for their needs.
8. Create shared expectations early on. This could include Group/Team Agreements, Ways of Working.
9. Let people know what to do in the event of technical difficulty.
10. Always have a back-up.
11. Less is more. What are the three bullet points you want to highlight.
12. Trust and connection is key. People will not engage if they do not feel comfortable and connected.

What else is important for you to keep in mind as you go to move your programming into the virtual space?

WORKSHEET -



What could your virtual programming look like?

Use this worksheet to capture your ideas as you read through the transcript of the Preparing for Blast Off call (next).

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WHAT IS THE PROGRAM I WANT TO CREATE?

WHAT ARE 2 OR 3 ADJECTIVES I WOULD USE TO DESCRIBE THE PROGRAM?

WHAT IS THE FIRST IMPRESSION I WANT TO CREATE? WHAT IMAGES OR OTHER CAN HELP?

WHAT DO MY PEOPLE WANT? WHAT ARE THEY LOOKING FOR FROM THE CALL?

IF I AM GOING TO DO A PRE-PROGRAM CALL, WHAT QUESTIONS DO I WANT TO ASK?

WHO ARE THE CLIENTS (FOR THIS WORK) AND WHAT'S IMPORTANT TO THEM?

WHERE WILL PEOPLE GO TO ACCESS THE PROGRAM? (HIGH-TOUCH? LOW TOUCH)

WHAT ENGAGEMENT POINTS WILL I BUILD IN? (REFLECTION, ANNOTATION ETC)?



WHAT WILL THE ROADMAP OF MY CALL LOOK LIKE?

WHAT WILL SUCCESS LOOK LIKE? FOR ME? FOR MY GROUP MEMBERS?

WHAT PLATFORM AM I USING? WHAT SHOULD I NOTE ABOUT THAT?

ON THE DAY OF THE PROGRAM, HAVE I RUN THROUGH MY PRE-PROGRAM CHECKLIST? (SEE OTHER TEMPLATE). WHAT DO YOU I NEED TO NOTE?

WHAT QUESTIONS AROUND EVALUATION SHOULD I NOTE?

WHAT ARE MY NEXT 3 STEPS AROUND THIS PROGRAM?

- 1.
- 2.
- 3.



TRANSCRIPT – PREPARING FOR BLAST OFF – PRE-PROGRAMMING PLANNING FOR VIRTUAL EVENTS

November 6, 2017 (11 – 11:30 am ET)

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The following is a transcript of one of the many community calls I've held around my newest book, Effective Virtual Conversations. You are invited to join me for an upcoming monthly community call. They are usually held on Mondays at 11 am ET on zoom. Information is always posted at our Facebook page – EffectiveGroupCoaching.

Good morning, good afternoon, good evening. We have global representation on this call which is always great and we are back together for another Effective Virtual Conversations call. These are at least for Fall 2017 a bi-weekly call that I'm doing as my new book, **Effective Virtual Conversations**, comes out into the world. They're short, they're sweet, they're only 30 minutes in length. I want to thank you for joining me.

So, today's topic is all about getting ready to launch. The frame of our conversation is helping you think about **What are the things you want to do as you get going with virtual programs?** During the call I want to walk you through a quick pre-program checklist. I'm going to take you into some habits that you might want to think about format. And, if we have time we'll start talking a little bit about first session.

In the virtual space today some of you may be coaching, some of you may be training, some of you may be doing retreats for full days. So, the first session might look a little bit different. The notion is to get you thinking about what's going to work for you. So, I hope that you'll grab to take some notes. (*Heart of Coaching Readers – use the worksheet which preceded this to take notes for yourself*)

Just to let you know where these calls go – they are linked to Effective Virtual Conversations.com. There is a Community Call page there. And what you will see is under the Community call Page is a growing body of new resources. So, I started with these back in July 2017 with our launch call.

In August we covered engagement and platforms so those that are interested in learning more about **where do you host these calls? What does virtual facilitation look like? What are the differences and similarities?**

In September I did call on **Activities to open and close virtual programs**. Again, virtual programs can look very different from one call to the next. Today we're on zoom but you might be in any given day hosting webinars, doing a conference call. Obviously, visually those look and sound a little bit different and very much we want to bring as much as we can people into the space. So I've got some people live here with me. I will invite you throughout to unmute yourself to ask questions and or you can also use a chat function here on Zoom so I'll try to incorporate your questions.

Our lens today of course is - **All about what you can do pre-program to give you better results**. So, I'm going to invite you just for a moment to think about **-What is the first impression you want to create?** If you put some adjectives around your upcoming work with groups or teams in a virtual space, **what are the three adjectives which describe the first impression you want to create?** Take 20 seconds right now to write that down. Top three adjectives on what's a first impression of what you want to create. (PAUSE)

I think we all have our own go-to of what's comfortable. What gets us in the flow? You know one thing that I've really loved sort of experimenting with a little bit more in the virtual space is more around visuals and some of you on the call might be wondering where do I go. **Where do I go to get some good images?** Because you need to really respect intellectual property. Of course, with today's global village we want to also make sure that we're crediting people as we can. I have a subscription through Adobe Stock and so every month they get access to 10 more photographs. And that really builds up over time. So whether you are able to do a webinar, whether you are designing e-learning, whether you just want a photograph to sort of like get people in the mood around your topic it's important that we have a lot of variety.

There is also a commercial license for those of us that are business owners and I think most people here will either be a business owner or a corporate employee. So really key that we're doing it right and we are also investing in our work. The nice thing about Adobe stock is that it doesn't cost too much every month in order to do it.

So now that you've got an idea of what results are, **what impression do you want?** It's really key that we get the group going. What you can see on the screen here is actually the interface of one of the programs that I run throughout the year and this will continue into 2018. This is the interface for a program I run called **The Learning Lab and Design Studio**. It is a group for people doing group and teamwork and I love it because we meet twice a month. There is a curriculum that every month has a different theme. They are broad enough so this month we're into **TEAM TRENDS**. Last month we talked about **MICRO-LEARNING**. A month before that we looked at **exercises**. We look at something different every month.

There is a resource portal at the Learning Lab and Design Studio. I want to draw your attention here to the top of the iPod flash tablet here. What I'm able to do for the LLDS is upload everything into a resource portal so whether people can join us live (and there are committed individuals who been there at 5 and 6 a.m. on a Friday morning or whether people are only able to join us once a month) or they log in afterwards, they can go online to this - it's called the **Learning Lab and Design Studio.com**. You can just go there to see the outside interface.

As we go to start thinking about getting the group going, what are the things we need to put in place - not only the art form but more importantly the platform and applications which allow us to do things like people connecting people (during the call, before the call). So, if you've ever done any work with me or read my books I'm really big on spending time a little bit of time before you get going with programming by reaching out with a **quick pre-program call**. Maybe you prefer to do that verbally. That's my preference. Or maybe you want to do a survey. You could use Survey Monkey to do this or just simply do it with an e-mail. Before the program begins it is important to ask people:

- 🗣️ What's brought you here?
- 🗣️ What are you excited about?
- 🗣️ Why are they joining you for this program?
- 🗣️ What are their goals and what are their needs?

It takes a little bit of time and of course that adds up. If you have four people in the group it'll take you an hour. You've got eight people in a group at 15 minutes a person that gives you two hours. *It takes time but it is well worth the investment.*

Page | 9 I'd like to give you a chance to think about your own program, so **please write down three questions you'd like to ask your group members. Preprogram.** Take a few seconds to write that down. (PAUSE) Heart of Coaching, note it on your worksheet.

My guess is you probably got a selection of the questions here on the list. **Chapter 6 of Effective Virtual Conversations also includes more questions** – the entire chapter is all about preparing for blast off, so I will be referring to these tips as we go.

I would also like you know continue to think about **who is your client and what's going to be important to them.** Some group members love hearing on your first call what the program is going to be all about, here's what we're going to do and here's what we're focusing on.

Other group members want to jump right in. So getting to know people before you get going is really critical. It's also critical in building the trust and connection needed for successful group work.

Another key thing that you're going to want to think about is materials. Have you even sent out the materials. And a quick rule of thumb whether it's a work sheet whether it's a hard copy or downloadable. You want to make sure that before the program you take a few minutes and build it into your calendar and send it out. My rule of thumb is send it out a week before. I always want to get materials at a week in advance. This markers gives me a mental moment to say hey it's a week in advance. I know for virtual programs sometimes I get upwards of 75 percent of my registrations in the last week before the program. This week before marker is in some ways me putting a stake in the ground knowing that yes every Monday at 11 30 this is going to be my time with a group. You will want to make sure that you have thought through what you want your materials to look like and how they could be stored.

In a bricks and mortar world for a lot of virtual things. We don't have the big old closets that we used to have. But you do want to think about a **storage system** and your storage system is your laptop. It is your digital files and your backup. A big consideration is how are you storing things? How are you securing things. How are you going to get them to people? Is it all at once. Or is it what we call a drip format. In the drop format you can release materials as you go.

Going back to the interface at the Learning Lab and Design Studio (LLDS), the nice thing about that platform which is hosted on Teachable is that people can go and get the material all at once. For some programs when we're meeting five or six weeks I drip it out so I will send an email with the materials for the next week. For ongoing longer groups like the LLDS I post things to the LMS Site or I upload them into the cloud. Through our LLDS teachable site so that people can just simply go there and access it. I don't follow up with a follow up e-mail. It's not a group that has regular communication in between the sessions like others can have. You will want to think **about “What is this program? Is it high touch or low touch. Where can people go to I access it?”**

And that's just one of many considerations because you will always want to have a backup copy and know where it is. So imagine a call like this. It's 11 25, the call starts at 1130. All of a sudden your computer system goes down. You have people calling. Where do you go. You will want to make sure first you have a backup laptop and second backup files of that presentation.

As a best-practice for preparation I try to always have a backup laptop that I can quickly set up. And be here on Zoom or wherever I need to be. But for high scale presentations definitely I always have a copy on a desk. It's something I mentally check on. Actually, it's one of the first things I'll do the morning when I am virtually speaking. As I come into the office in the morning I'll look through my schedule see what presentations I have especially ones that are a one off where you know it's really critical that I'm there. I mentally run through a checklist of:

- 🗨 Do I know where my backup copy is?
- 🗨 What tech tools (i.e. mobile phone, extra laptop) do I have if things happen?
- 🗨 Are my back-up devices charged?

And also build in time if you can for helping people get to places. So keep an eye on your e-mail. If it's feasible if it's not.

Now by the time you're prepping for a program you probably have an idea of what **size is the group** is.

What you see here on your screen is a cartoon from the Teams365 blog (<http://www.potentialsrealized.com/teams-365-blog>). And it's actually one that shows up in a new book. This is Jo, a new team leader and she spends her life working virtually. You know this is part of her team. It's a team of five. A team of five is a beautiful size to be working with. It allows you to do lots of breakouts. It allows you to be in larger group discussion. When designing for engaging virtual conversations, you will really want to think about the size of the group because having two people on a call or five people on a call. Very different than having 300 people on the call.

Last month I had over 325 people on call I lead. The feedback indicated that this was one of the best webinars I had attended with this association. And that's because I built in **Reflection points (Where people could pause during the call and take notes). Chat points – where they could share their ideas with each other through chat.** Unfortunately we couldn't do breakouts but I built in a lot of interactivity so that people like you're doing already and the first sort of 15 minutes. Writing things down. Thinking about things on Zoom. Normally we don't have polls but if you have larger groups you want to get to make sure that you have polls set up.

So, what I invite you to do right now is see if you have **annotation**. Please go to your annotation bar and on the screen, and start to mark it up. Write out for us your response to the question, "So far in this presentation what's the one thing you need to be thinking about in your next program, in the program you're going to be launching. Next year next fall this fall. What is the one thing you need to be thinking about?"

Annotation on Zoom is usually found in a keyboard below as a button, or it will be found in your options bar. It's going to be a little pen - if you want to grab that right now. If you can't find it, just let me know. I want you to think about what's the one thing you want to keep an eye on?

Another thing that's really critical with prepping for calls (which is really the focus of today) - it's like helping you get on the mark as I call Chapter 6 preparing for blast off- is creating a **roadmap**. Think about what is the thing you need to do helping folks join in as you begin. There's a lot of moving parts of your call. If we use this Roadmap almost like the start of the road if we consider this little area down here to point one as maybe the first five or so

minutes. If you have a new group it's going to take you some time to get to point one where you actually have everyone on board and everyone ready to go.

You will want to know how you need to scale the roadmap of your call within the time you have because one of the things that just isn't really feasible in virtual events going longer. Chances are just as we have today, I know for a fact that we have people in four different geographic locations. Four very different time zones of the day some people moving towards lunchtime, others moving into the middle of the night and so 30 minutes needs to be 30 minutes. It's really important that you mentally think **through your roadmap with your call and think about what areas need to get squished or compressed if things are taking longer**. Now I like to use a lot of charts and tables and if you take any work with me you can refer back or think back to the **design matrix tool**.

But some people like to get a little bit more metaphorical and actually use a structure like this -The roadmap as a just sort of their indicator if you had a 60 minute call. Where do you want to be by maybe five minutes in. Point two is going to be 20 minutes into the call point three is another 15 minutes after that 35 minutes and then points four that 15 minutes and that's where I need to be in order to take any questions.

Consider where you want to be at different stages and you'll think about your main points, your engagement points and any pause and next steps. If this is one of the first effective virtual conversations calls that you have jumped in on, do check out the call that I did in **August 2017** on engagement points you want to get people to be thinking things, writing things down, much more frequently than we do in the in person space.

So. **What will success look like?** And going back to your own idea, I'd like you to jot down - we talked earlier about what's the environment you want to create. But now I'd like you to figure that same program and **think about the three adjectives that will describe what's the end result you're aiming for**.

Please take a moment to **note for yourself what will success look like. How will you know this virtual call has been successful for your participants? Or in other words, what are the end results you were aiming for?** Take 20 seconds to note that for yourself.

(PAUSE- Refer to workheet)

Our Success Factors really will shape everything from the graphics we use, to how often do we engage with people etc.. And this really brings us part and parcel to another consideration on that pre-program checklist to get us a frame as **what is the platform you're going to be using. Are there any issues to note. Are there any special access codes you need? (Refer to worksheet)**

So about two years ago I did a series of posts on different virtual facilitation tips. You can find them at FacilitationSkillsIntensive.com and Teams so you can find them at. Yet another Web site facilitation skills and sense of dot com. And you'll also find them at the Teams365 Blog (<http://www.potentialsrealized.com/teams-365-blog>).

Virtual Facilitation tip number eight is - Choose the platform that best fits your content, your purpose and your interactivity. Sometimes we have influence over the platforms that are used. Other times we don't. But we really do want to make sure that we are choosing a platform that is the best one for a purpose for content and interactivity. And anyone with questions after today's call around platform do check out the earlier call I did here at the Effective Virtual Conversations community calls from August of this year (2017) - notes at the end.

Another key thing to have in mind. I know this is a lot of different things but you might choose to put things in a notebook. So I have a new group starting this afternoon. I've got a brand new notebook somewhere on my desk but just put their contact details in it. So here we go - here's the brand new notebook again I will show you the page but just you know you want to have your contact details. For your group phone number and e-mail address because Murphy's Law will happen. And all the sudden you'll be on the line, systems will go down. You want to have a quick way to get in touch with people. **That goes hand in hand with having your back up.**

The other thing that I would say is that there is always something else and as much as what we've taken from today's calls on **Page 219 of Effective Virtual Conversations**. There is always a myriad of other things you want to consider before you get going.

I'd like to invite you right now using annotations or chat (**Heart of Coaching, note this in your worksheet**). Just to let us know your things like:

- 🗨️ Do you have a backup?
- 🗨️ What is your roadmap?
- 🗨️ What's the environment you want to create?
- 🗨️ What else do you think you're going to need to think about. As you go to do your own group or team or individual virtual call.

Just take a moment to note anything else for yourself, that you would put on your checklist.

PAUSE

One that we haven't explored today. - and I'll just throw it out here - is the **ways of working**. So most of us know that it might work as a coach really important that we create some **group agreements** and that's something you're going to want to speak to very early on. Not only just on your first call but like it's something you can warm people up to asking them. **What to you know what they want and what they need in terms of having a positive learning environment.** *It's a small point but a really key point in creating safety.* And we've got another excellent point you know **evaluation**.

Here is a question which came up in chat - dealing with technical difficulties in the middle of the call. Okay so **technical difficulties**. And thank you for the acknowledgment that I do so well. Technical difficulties will inevitably happen. And this just in part I think. Confidence in your own ability to navigate and provide clear instruction on. If you're not seeing someone this is what you can do or if annotation isn't working then go to chat.

You know we always want to think in a **contingency line but we also want to make sure we understand the platform**. And we only are able to do that through practice. So before you go to launch your own programming virtually do think about what's going to help you get very comfortable with these different elements. Many of the platforms whether it's a WebEx or zoom or whatever you can go on by yourself or you can invite friends and family to just help you explore it. There are also, of course, different tutorials but I think you know for some of us we see a tutorial but we want to practice it as well.

that's where I think if you have a group of friends, colleagues, loved ones, who will give you five minutes of their time that can be really valuable so that you can understand **how do I switch between screen sharing or bring something else up**. This is why I love you know things like zoom. It really makes it very easy or easier than some of the other platforms as a facilitator because there's a lot of things going on. Technical - Participant Y is.

Another thing that we haven't talked about in terms of pre-preparation which is what is so important on all of our work is **evaluation**. Now we are going back to the start of the program design.

Questions to consider when thinking about evaluation:

- ☛ Are you doing a pre-program check point or benchmark?
- ☛ Are you giving people a list of the skills that they're going to be learning in your work together or
- ☛ Are you having them self-assess where they are now so that you are able to look at where you might go that you know or where they are the end of the program.
- ☛ Are you putting into place any measurements that need to be explored, looked at etc.?

So, there's a lot of things to be keeping in mind but helpfully it's fun.

What you can see on the screen is another one of our cartoon characters from the new book. So earlier you met Jo. This is Jane. Jane she is a virtual facilitator. Notice all of the skills that are just in front of her. She's a new virtual facilitator so she knows she's doing tech savvy, she works on her feet, she builds connection, she's well-read. She's comfortable in not being able to see because that's a really big one. We need to also make sure that we are optimistic to a certain extent. I would say optimistic in the fact that, "it's going to work". The technology is going to work maybe not always optimistic in the outcome because we want to keep groups in teams where they're at. But we also want to be very comfortable in being a multitasker. So lean into your skills are still out there. Things like using intuition, being a good troubleshooter, being a great host. These are things that are really key skills regardless of running a one-off webinars. Or are actually doing a series of virtual calls?

There's always learning to be done. And I'm hoping not just out of our quick time today that you have got a couple of steps you'd like to commit to for yourself. I want to give you a pause point to think about what are your next steps for your work. **If there is one thing you want to put attention around in the next week, or the next couple of months for example before the end of the year. What are your next steps going to be?** Take a moment to note those.

Now, a great question has just been posed through the chat. **How do you deal with a person who never got on and is angry or disappointed?** Such a great question. So here's how in programs that you control (i.e. not a forum like this so a forum like this the stakes are higher). You know I know one of you earlier today reached out and said I don't know how to get the call. I was on another group so all I could do was send the link. You know I would have loved to have been able to pick up the phone to say here's how to do it and walk you through. IT's not always feasible so you will want to think about how you support technical difficulties in your programs.

If you are hosting a program on a certain platform, always meet people there for the pre-program. So if you're kicking off with a six-week session. Do your pre-calls on the platform. So they know how to get on and the chances are reduced that there's a possibility that they're not going to get on. If they are angry or disappointed reassured that you've got a recording you might even if it's appropriate offer to stay on the line answer the questions or meet with them again if it's appropriate. Again there's so much variability here. But I think in the virtual space we have an upcoming call on this so I'll just go to this slide with an overview of what's next.

Our next **Effective Virtual Conversation call will focus on Tricky Issues in the virtual space.** It's next week Monday. And I will be talking about some of these situations where what do you do. What do you do if someone can't get on. Well the challenge of the mindset in the virtual spaces – **the mindset is that it's not going to work right.** That is probably the belief system we need to adopt and we need to help our group members also do some troubleshooting. There may be instances where it's just not feasible for people to get on.

So, you can do what you can, by meeting people on it before you start the program. You may also have multiple instructions. One reason why I like Zoom is because in the options people have to join in. You can not only zoom in by computer you can also phone in and that gives people options. And once they have options if they can't get on their computer they're going to get on the phone. So, it automatically puts people to a greater sort of ease.

Now earlier in this call I was asking you to **reflect on what do you have upcoming related to this topic?** So I'm going back here. I've already talked a little bit about the LearningLabandDesignStudio (<http://www.learninglabanddesignstudio.com>). That's an annual group that meets twice a month. Also the Virtual Facilitation Essentials is a five week program. If any of you have taken Group Coaching Essentials™ program with me it's comparable but with a focus on virtual facilitation, with all different content. Most of these programs are listed over **EffectiveVirtualConversations.com** Some programs are still listed over at GroupCoachingEssentials.com, if it's related to group coaching.

If you're hungry for more join me either next week (or a future call). Same time same zoom line for tricky issues. And if you are hungry for more reading definitely pick up a copy of the book. If you haven't picked it up yet you can go to Amazon. Amazon is probably the easiest order fulfillment place anywhere.

You can also join me for one of those programs or take a look at the Teams 365 blog (<http://www.potentialsrealized.com/teams365blog>). This fall I am doing a series there on Tuesday and Wednesday series on different virtual and remote team exercises. Tomorrow at the blog we're going to be looking at how do you help virtual teams had better feedback conversations. Last week we looked at how do you help a virtual team have a difficult conversation. It's a slightly different lens and there's just so much to do that is in a space that I think increasingly more and more people are jumping into. And, still not a lot of resources.

Page | 15 So, as always, I want to thank you for your time today. If anyone would like to share their next step I'd love to hear that because it's all about **helping our clients create a bullet plan**. And this is just another quick way right. And we've used a couple of different techniques to help you leave with your next steps including:

- 🗨️ Post It Notes (graphic);
- 🗨️ Three bullet points that you might include at the end ;
- 🗨️ Reflection Questions;

AND getting people to naturally think that what are your next steps.

I would like to invite you to share your ideas and takeaways anytime at our Effective Group Coaching Facebook page. I hop you come back and join us next week – same time, same zoom line, for another 30 minutes on tricky issues in the virtual space. You can view most of the past recordings at <http://www.EffectiveVirtualConversations.com/community-calls.html>.

So, with that, be well everyone. Have a great day. And I want to say thank you for joining us!

End –

Call Led by Jennifer Britton, November 6, 2017

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Virtual Session Checklist



1. PRE-PROGRAM

- Connect with participants to validate program needs (email, phone, skype etc.)
- Develop an FAQ and post
- Finalize program design, interactivity and platform. Invites out with welcome letter and/or materials
- Identify pre-work
- Post any booklet/worksheets
- Marketing as needed - Enrollment

2. KICKING OFF SESSION

- Welcome, WIIFM, Introductions, What You Can Expect, WOW
- Overview of the program/conversation
- What do you want to get out of the call? What will success look like?
- When to Meet, and How. How to contact you.
- Materials available

3. DURING THE CALL

- Questions to focus and motivate
- Engagement touchpoints (7-10 min): Questions, polls, chats, media, breakouts
- Pause Points – reflection, next steps
- Setting people up for success Do it now! Action during the call

4. FOLLOWING UP

- What want to celebrate? What did you learn?
- Next Steps – Who will do what? By when? How? Check points. Accountability partners.
- Keeping the focus and conversation alive
- Other touchpoints/focus/connections
- Evaluation

(Excerpt: Effective Virtual Conversations, Copyright 2017, Jennifer Britton)

MARKETING YOUR VIRTUAL PROGRAMS



And now on to marketing! Design is only one part of the equation. Marketing is often when many coaches will find their time. To support you in this area of your work, do check out this related resource:

Effective Virtual Conversations Call – [Marketing and Filling Virtual Programs \(October 16 2017\)](http://www.effectivevirtualconversations.com/community-calls.html) which can be found at <http://www.effectivevirtualconversations.com/community-calls.html>

Part of Marketing success is about having a plan and taking consistent action. You may want to this page and the next to support you in identifying content you want to put out during 2018.

What channels do I want to use to get my message out?

- | | |
|------------------------------------|--------------------------------------|
| <input type="checkbox"/> Twitter | <input type="checkbox"/> Speaking |
| <input type="checkbox"/> Facebook | <input type="checkbox"/> Articles |
| <input type="checkbox"/> Pinterest | <input type="checkbox"/> Newsletters |
| <input type="checkbox"/> Blog | <input type="checkbox"/> Referrals |
| <input type="checkbox"/> Instagram | <input type="checkbox"/> Other |

List 10 topics you could write/speak/connect about:

- | | |
|----|-----|
| 1. | 6. |
| 2. | 7. |
| 3. | 8. |
| 4. | 9. |
| 5. | 10. |

NOW.... Return back to the channels list and make a note of the frequency you would want to communicate on each channel.

- 🗨 When will I schedule this? (Use the 2018 Content Calendar on the next page to schedule)
- 🗨 How will I keep motivated?

Note your next 3 steps:

- 1.
- 2.
- 3.

2018 CONTENT CALENDAR



Use this content calendar to keep track of your focus this year. It's part of the monthly resources I have available through the Teams365 planning resources - Get [] Done™

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2018 Content Calendar

January	February	March
April	May	June
July	August	September
October	November	December

Planning Tools: Get [] Done(TM) - Teams365 from Jennifer Britton, Potentials Realized. All Rights Reserved

VIRTUAL ACTIVITY – FROM 40 WAYS TO WORK WITH VISUAL CARDS

Page | 19 Having a variety of activities and exercises to engage your virtual group and team members is critical for success. A favorite resource is visual cards. There are many decks available which you can find at CoachingToys.com, including our ConversationSparker™ Cards. Here's a set of instructions on how you can work with visual cards when opening a group or team session around intentions:




Intentions

Key Theme Areas – Focus, Opening, Grounding

Setting an intention can create focus. AS Wayne Dyer wrote, "Our intentions create our reality".

Providing a pause for people to set an intention can be an important part of grounding in a workshop, retreat or other learning process.

Time: 5-10 min minutes

Who For: Individuals or teams

Instructions

Option A – Ask each participant to think about what they want to get out of the experience and have them select a photo. If the group size is small enough, have each person share their intention as you go round the group. If the group size is larger, have people pair off and share their intention with one other person.

As people hear from each other, you may ask people to notice who has a similar intention, or where you might be able to support others.

Option B – Select one photo and show it to the group. Have people explore and identify what it means for them in terms of framing the experience.

Depending on time you may ask the group to notice:

- What are the similarities?
- What themes are showing up?
- How do you connect with other's intentions?
- How does everyone's intention connect?
- What are the three adjectives which summarize the intentions we've heard?
- What environment have we created together with these intentions?

Notes

Share your ideas with others
www.conversationsparker.com |  EffectiveGroupCoaching | (416) 996-TEAM (8326)



Intentions

Notes

"We either live with
intention or exist by
default."
- Kristin
Armstrong

SPARKER QUESTIONS

- What do you want to get out of the experience?
- What is your intention for our time together?
- What is the perspective you want to approach our work together?
- What emotions do you notice as you look at the card?
- How can this help you make decisions right now?

VIRTUAL TIPS

This is an excellent starter activity to set the tone and help people get focused in a virtual domain. If you are able, share the photos in the whiteboard. If you are not able to do that have people reflect on the question of what their intention is and have them verbally share it. This can be an important process in connecting the group. If feasible try to hear from each person.

POSSIBLE USES

- Opening a learning experience
- Grounding group members at the start of a process
- Connection

RESOURCES TO SUPPORT YOU IN YOUR WORK



For more on the topic of Effective Virtual Conversations, you may want to check out these great resources:

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21 **Books:**

Britton, Jennifer. **Effective Group Coaching**, Wiley, 2009 (Check out Chapter 7)

- **From One to Many: Best Practices for Team and Group Coaching, 2013**
- **Effective Virtual Conversations, 2017.**

Duarte, Nancy and Diane Snyder. **Mastering Virtual Teams**, 2006.

Fogelberg, F. **Live Connections: Virtual Facilitation for High Engagement and Powerful Learning**, 2016.

Huggett, Cindy. **Virtual Training Basics**, ASTD Press, 2010

--- **The Virtual Training Guidebook**, ATD Press, 2013

--- **Virtual Training Tools and Templates**, ATD Press, 2017

Other Go-To Resources:

BusinessBalls.com – Check out the different activity outlines here

MindTools.com – Great resources around facilitation of all kinds

Wilderdom.com – Check out their group activity toolkit

Our Resources:

EffectiveVirtualConversations.com – including community call information and some of the past recordings

Conversation Sparker™ Cards and the 40 Ways to Work with Visual Cards :
<http://www.conversationsparker.com>

Blog topics can be found on virtual facilitation and virtual and remote teams at
<http://www.potentialsrealized.com/teams-365-blog>

Check out the Virtual Conversation Sparker Blog at EffectiveVirtualConversations.com

Thanks for joining us for this resource! What was your biggest insight? Share it with us online using #hocevc2018 as your hashtag.

Jennifer Britton, MES, PCC, CPCC, BCC

ABOUT JENNIFER BRITTON, EFFECTIVE VIRTUAL CONVERSATIONS

AND HER WORK:

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From Corporate Boardrooms, to South American jungles, from Canada's Lakeland beauty, to hospitals, coach and author Jennifer Britton has spent the bulk of her career supporting better conversations and learning with groups and teams. Jennifer is a well-known author and thought leader in the area of group and team coaching. Her first two books, **Effective Group Coaching** (Wiley, 2009) and **From One to Many: Best Practices for Team and Group Coaching** (Jossey-Bass, 2013) have been used as a required and recommended book by many coach training schools. Since 2006 she has worked with hundreds of coaches through the ICF CCE approved Group Coaching Essentials and Advanced Group and Team Coaching programs. A former team leader and Director with the United Nations, Jennifer returns to her roots as a virtual team leader, weaving it with her last 14 years experience as a virtual coach and facilitator, in her newest book, **Effective Virtual Conversations** (published 2017). This book is geared for professionals of all kinds who are looking to create more engaging, and effective, virtual conversations.

Jennifer has designed award-winning virtual and in-person leadership and coaching programs. She received the Prism Award for Excellence in Coaching in fall 2016 from ICF Toronto for her work in developing a coaching culture within healthcare. This work was also honored with an Award of Excellence – Curriculum Design from the Institute of Performance and Learning in 2017.

Since 2004, Jennifer has supported thousands of coaches in launching their own group and team coaching practices. Since the 1990s she has been involved in developing leaders and facilitators who work virtually.

Jennifer is a Professional Certified Coach (PCC), Board Certified Coach (BCC), and is a Certified Professional Co-Active Coach. She holds a Bachelor of Science, and a Masters of Environmental Studies.

An avid blogger, connect with Jennifer online at **EffectiveVirtualConversations.com** (Virtual Facilitation), **GroupCoachingEssentials.com** (Group and Team Coaching) and **Potentials Realized.com** (Leadership Issues).

Connect with Jenn at	 @jennbritton OR @teams365	(416)996-8326
 EffectiveGroupCoaching	 jenn.britton	info@potentialsrealized.com

ⁱ <https://elearningindustry.com/top-10-e-learning-statistics-for-2014-you-need-to-know> (accessed 3/25/2017)

ⁱⁱ <http://www.cnbc.com/id/100275798> (accessed 1/17/17)

ⁱⁱⁱ <https://elearningindustry.com/top-10-e-learning-statistics-for-2014-you-need-to-know> (accessed 2/27/2017)