

Facilitating Online Collaboration

Lead Great Virtual Meetings and Sessions



Course Overview & Outline

Welcome

Selecting Your Pathway Through the Course

Facilitating Online Collaboration is a comprehensive course on how to facilitate group work online. Whether you are leading remote or distributed team meetings or guiding a collaborative group through an online work session or longer workshop, this program provides the facilitation skillsets and mindsets you need to succeed.

This is an exciting time! Not so long ago it would not have been possible for “non-techie” facilitators to easily achieve what can now be achieved online. While web-based collaborative platforms have been around for many years, the capacity, quality, and user-friendliness of tech tools have quantitatively exploded. Online facilitation is now a feasible and attractive alternative to in-person meetings and collaborative work sessions for anyone using the guidance in this course.

No matter if you are just beginning your journey as a facilitator or if you already have experience guiding group process, through this empowering course, you will build your skills and knowledge to launch your facilitation of effective online group work.

Whether in-person or online, happily, the same underlying practices, activities, and techniques guide what and how you facilitate any type of group work for any size of group. If you do not already possess them, the foundations of best facilitation practices you acquire here are transferable. You are adding new tools to your facilitation toolbox that will enhance your agility and capacity to facilitate great meetings and group collaboration both in-person or virtually.

“I am just starting on my facilitation journey.”

If you are a new facilitator, in some ways you are at an advantage, as there is nothing you must unlearn. Simply determine your goal and follow the appropriate checklist and modules for the virtual work in front of you. Step by step, you will build on your solid foundation of facilitation skillsets and mindsets. Intend to build your repertoire of skills and online tools incrementally. Download all the modules of this complete online facilitation course so you can refer to them now or later as your facilitation work progresses.

“I have facilitated before.”

If you have facilitation experience, then you are not starting from scratch. However, do not expect to simply transfer your in-person practices to online work. You must be willing to re-imagine your approach. Be reassured though – your previous foundation will serve you well. Depending on what experience base you have, you may choose to strategically scan and find exactly the modules you need right now for your area of interest.

While both novice and experienced facilitators will benefit from moving *sequentially* through the modules to understand the conceptual models and facilitation terminology, your best initial pathway is as described below.

What Work Do You Want to Do?

Your journey through this *Facilitating Online Collaboration* course starts with answering this question: *What virtual work do you want to facilitate?*

“I want to lead virtual meetings.”

The meetings of a virtual team or group usually re-occur and have a standard predictable agenda. These typically include 1-on-1 check-ins; regular team huddles; weekly team meetings, monthly group meetings, as well as larger unit or organizational information meetings. All involve participants who share a common goal towards which they work, either as a primary part of their role, or as a member of a voluntary, appointed or elected body. Regular virtual meetings should last from 10 minutes to at most 90 minutes before a break. When you run these meetings, **things get discussed:**

- Share information.
- Provide status/progress updates.
- Check-ins with people; build team relationships.
- Obtain input and gain feedback on possible options.
- Coordinate regular tasks.

If leading virtual meetings is your immediate and primary goal at this time, your best pathway through the course is to focus on completing the modules for **Leading Great Virtual Meetings**.

START WITH MODULE 7 to gain immediate and empowering practical tips, tools and techniques for running live interactive virtual meetings. Then come back into the remainder of the course to complete the modules that have been flagged as most relevant to your current interest. This will allow you to pick up the concepts and tools that are applied in Module 7, the knowledge of which will support your success as a virtual meeting leader.

“I want to facilitate online collaboration.”

In contrast to regular meetings, online collaboration occurs in a working session with a group of people you’ve specifically convened to address a unique purpose. And by including a diversity of disciplines, views and knowledge, you increase the chances of innovation and sustainable solutions. Be prepared for longer timelines. Online collaborative sessions can last anywhere from 1/2 day to 2+ days. In fact, some workshops could spread out over weeks, with some work conducted live and much completed asynchronously. Working sessions go beyond discussion, and are specifically held to **get things done** (collaborate, decide, plan), such as:

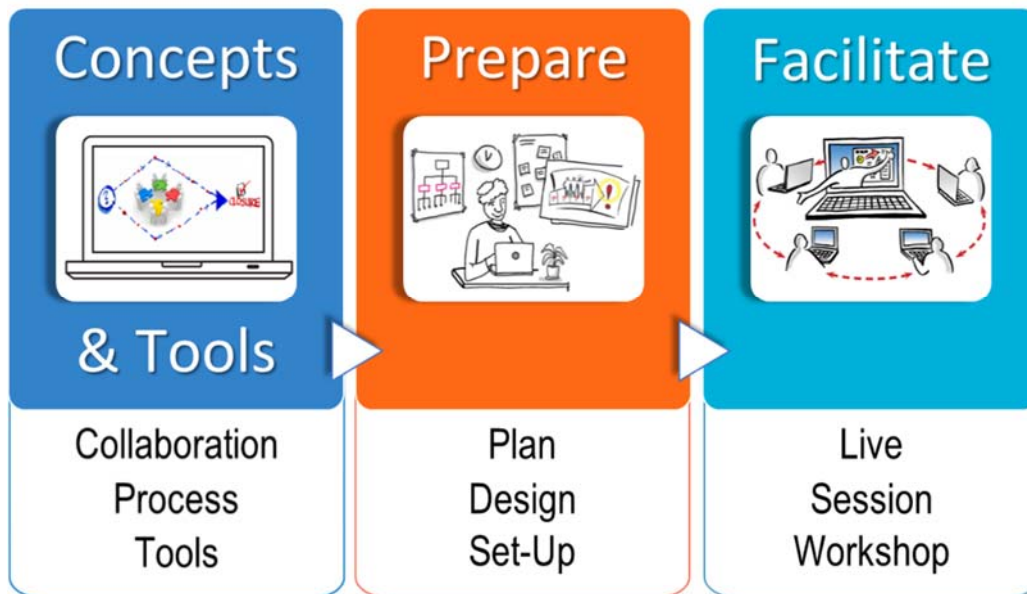
- Solve problems.
- Create ideas and designs.
- Improve processes.
- Develop strategy.
- Establish plans.
- Make and implement decisions.

If facilitating online collaborative work is your goal, the whole of this course has been designed to support you. Follow the **Facilitating Online Collaboration** checklist.

START WITH MODULES 4, 5, 6, 7 AND 8 to gain immediate practical tips, tools and techniques both for running an interactive live virtual session, and for facilitating an online collaborative work session, respectively. Then come back into the remainder of the course to complete the rest of the modules. (*Experienced facilitators: Use your judgement on how much time to invest in foundational concepts either as a quick refresher and/or for clarity on terminology used.*)

Overview

The Facilitating Online Collaboration course is organized in three sections each with three modules comprised of many lessons and bonus resources.



Section A: Right Foundation: Concepts and Tools

Your starting point as you begin this course is to acquire the right foundation of facilitation *concepts* to support your collaborative work, and the right foundation of *technology tools* to supporting working virtually. Section A covers:

- ✓ Module 1 -The promise and challenge of **collaboration** to achieve a unique goal with a diverse group.
- ✓ Module 2 – The **facilitation process** to guide the divergent, lateral, and convergent thinking for collaboration.
- ✓ Module 3 – The right online collaboration **tools** and the right **technology** foundation to support the work.

Section B: Solid Preparation: Good Process = Good Results

Planning and process design are **essential for the success** of any collaborative group work, and even more so in the online environment. Perhaps you could wing-it for in-person meetings with your team and get away with just showing up, hoping to find your way together. Doing so for collaborative work is almost surely a recipe for poor results. Your upfront investment in solid preparation is your secret to success:

- ✓ Module 4 – **Scoping** out the collaboration and planning out the work.
- ✓ Module 5 – **Designing** the agenda, process, and group activities to facilitate the session online.
- ✓ Module 6 – **Setting up** right for interactive real time virtual sessions and focused asynchronous work.

Section C: Facilitating Online: Discussion and Collaboration

There are two parts to any online collaboration: 1) the real time interaction and discussion that happens on a video-conferencing platform, and 2) the collaborative work that occurs live or asynchronously.

Facilitation covers the spectrum of group work from team meetings of 3-10 people, work sessions and workshops with 8-25 participants from the same organization, and multi-stakeholder sessions potentially with 25- hundreds and even thousands of people.

Section C, Facilitating Online, brings everything together. Your facilitation plan and detailed process design are applied to lead great virtual meetings and online collaboration:

- ✓ Module 7 - Running interactive **live virtual meetings** and work sessions.
- ✓ Module 8 – Facilitating a **collaborative work session** live and asynchronously.
- ✓ Module 9 – Facilitating a **multi-session workshop** with Five-step Workshop.

DETAILED COURSE OUTLINE

Content	Format	Focus
GETTING STARTED		
<ul style="list-style-type: none"> Course Overview and Outline (<i>this document</i>) 	PDF Video	Both
<ul style="list-style-type: none"> Leading Great Virtual Meetings Checklist 	PDF	Meetings
<ul style="list-style-type: none"> Facilitating Online Collaboration Checklist 	PDF	Collaboration
SECTION A: CONCEPTS & TOOLS		
MODULE 1: COLLABORATION		
<ul style="list-style-type: none"> Module 1.1 Facilitating Collaboration: Working with Diverse Groups 	PDF Video	Both
<ul style="list-style-type: none"> Module 1.2 Collaboration Principles: Shifting from Partial to Whole System View 	PDF	Collaboration
<ul style="list-style-type: none"> Module 1.3 Dialogue and Engaging Multi-Stakeholder Groups - BONUS 	PDF	Collaboration
MODULE 2: PROCESS		
<ul style="list-style-type: none"> Module 2.1 Process: Facilitation Diamond: Divergent, Lateral and Convergent Thinking for Collaborative Work 	PDF Video	Collaboration
<ul style="list-style-type: none"> Module 2.2 Practices: Core Facilitation Practices for Guiding Groups Live During Any Meeting or Session 	PDF	Both
<ul style="list-style-type: none"> Module 2.3 Core Process Techniques in Your Facilitation Toolkit 	PDF	Both
MODULE 3: TOOLS		
<ul style="list-style-type: none"> Module 3.1 Tools: Picking Your Tools for Online Collaboration 	PDF Video	Collaboration
<ul style="list-style-type: none"> Module 3.2 Right Technology: Right Technology & Virtual Considerations 	PDF	Both
<ul style="list-style-type: none"> Module 3.3 Interactivity: Interactivity Tools and Participant Styles 	PDF	Both
<ul style="list-style-type: none"> Links to Tech Resources 	Online	Both

Content	Format	Focus
SECTION B: PREPARE		
MODULE 4: PLAN		
• Module 4.1 Scope Out Your Online Collaboration	PDF Video	Both
• Graphic Worksheet: Online Work Session Plan	PDF	Collaboration
MODULE 5: DESIGN		
• Module 5.1 Design: Step-by-Step Design. Helpful Online Resources	PDF Video	Collaboration
• Module 5.2 Steps to Creating Meeting Agenda	PDF	Meeting
• Graphic Work Session/Workshop Journey	PDF	Collaboration
MODULE 6: SET-UP		
• Module 6.1 Ready: Ready Your Virtual Space. Yourself. Your Participants	PDF Video	Collaboration
• Module 6.2 Asynchronous: Any Time/Any Place PreWork and Group Work	PDF	Collaboration
• Module 6.3 Community: Expectations and Session Norms. Connections/Warm-Ups	PDF	Both
SECTION C: FACILITATE		
MODULE 7: LIVE		
• Module 7.1 Live: Running Interactive Live Virtual Meetings / Sessions	PDF Video	Meetings
• Module 7.2 Discussion: Leading Engaging Large Virtual Meetings	PDF	Meetings
• Module 7.3 Manage. Trouble Shoot and Shine!	PDF	Meetings
• Checklist: Great Virtual Meetings	PDF	Meetings
• Checklist: Trouble Shoot	PDF	Meetings
• Bonus: Death by PowerPoint	PDF	Meetings
• Detailed Large Input-Feedback Meeting Process Design - Editable	Word	Meetings

Content	Format	Focus
MODULE 8: SESSION		
• Module 8.1 Work Session: Demo: Facilitating A Simple Collaborative Online Work Session	PDF Video	Collaboration
• Detailed Collaborative Work Session Process Design – Editable	Word	Collaboration
• Module 8.2. Breakouts: Leverage Small Group Work and Engagement	PDF	Both
• Links to Helpful Resources	Online	Collaboration

MODULE 9: WORKSHOP

• Module 9.1 Workshop: Overview of the Five-Step Workshop	PDF Video	Collaboration
• Module 9.2 Activities: Selecting Activities for Participant Mindset	PDF	Collaboration
• Module 9.3 Facilitating Through the Groan Zone and Dynamics Styles	PDF	Collaboration
• Module 9.4: Generic Workshop Agenda Flows – Bonus	PDF	Collaboration

If Your Interest Is, Then Read...

At the start of each Module, you will find a more detailed description of your pathway, depending on your current interest and level of experience. An example is given for Module 1 on the next page so you'll know what to look for.