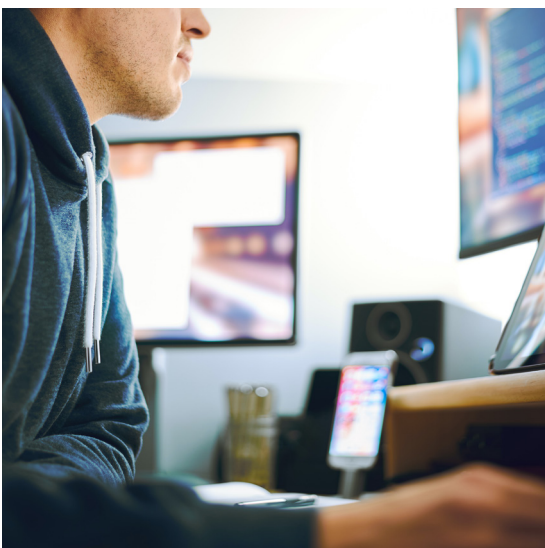




# PROPELLER

## FACILITATING A REMOTE WORKSHOP

### TIPS & TRICKS FOR SUCCESS





**With the recent shift towards increased remote work, Propeller consultants are fielding recurring requests to translate our previously-planned client workshops and interactive, multi-hour events into a digital environment.**

### **What makes this request unique?**

- **Workshops are usually intended to drive team collaboration and shared decision-making**
- **Workshops usually have larger group sizes than a regular meeting**
- **Workshops usually require several hours across several meeting spaces**
- **Workshops usually utilize break-out sessions and group activities to encourage interaction and keep energy high**



# THE NEED

*How we can move our workshops from a physical to a digital format without losing the connectivity we aimed for in the first place?*

Armed with the need to continue delivering dynamic, effective workshops even from a remote environment, our experienced Propeller problem-solvers have uncovered some best practices for facilitating interactive, full-day workshops online.



# BEST PRACTICES



## START WITH THE BASICS

You likely won't get everything you need in one tool – use your existing conferencing software for the core conversation, and supplement with a few lightweight apps for additional interactive content.



## SET EXPECTATIONS

Agree on ground rules ahead of time for specific meeting etiquette. Articulate which sessions are “video/audio on/off,” as well as how participants can raise their hands, offer suggestions or feedback, and engage in side conversation. Larger kick-off sessions or leadership announcements may be more manageable without participant audio and video. Also consider utilizing the “Chat” channel for input, and allow the facilitator to call on people directly.



## SCALE BACK THE NOISE

Be realistic about what technology can deliver across larger remote groups. If you're used to leveraging flashy videos or music to kick-off your workshops, realize that you may be limited by your video conferencing bandwidth.



## DON'T GIVE UP ON THE BREAK-OUT

Breakout groups help drive engagement from even the shyest members of your team. Rather than avoiding them for remote workshops, set up several dial-in connections in advance where teams can meet separately. Compile a shared document or reference guide ahead of time with all the virtual call information in one central place. It may also be helpful to keep one central Slack or Teams channel open throughout the day for cross-team comments or general chatter.



## ORGANIZE EFFECTIVELY

Speaking of team sizes— aim to keep your group size at a manageable level. Larger groups may be necessary for leading larger kick off or summary presentations, but aim for maximum of seven participants if your goal is real-time collaboration.

# BEST PRACTICES CONTINUED



## DOUBLE-DOWN ON DOCUMENTATION

In an environment where you can't always visually confirm understanding, it's especially critical to capture ideas, decisions and key points in writing. Leverage the technology you're using to ensure your team is all on the same page and aligned. Summarize extensive discussion into key points that everyone can agree to – this will help ensure you're properly translating your teams' thoughts and ideas for future reference.



## ALLOW FOR SILENCE

Unlike face-to-face workshops, you may not be able to easily read the room and gauge participant reactions. Get comfortable with a little bit of silence on the end of the line – trust that people are thinking and that questions will arise from the void.



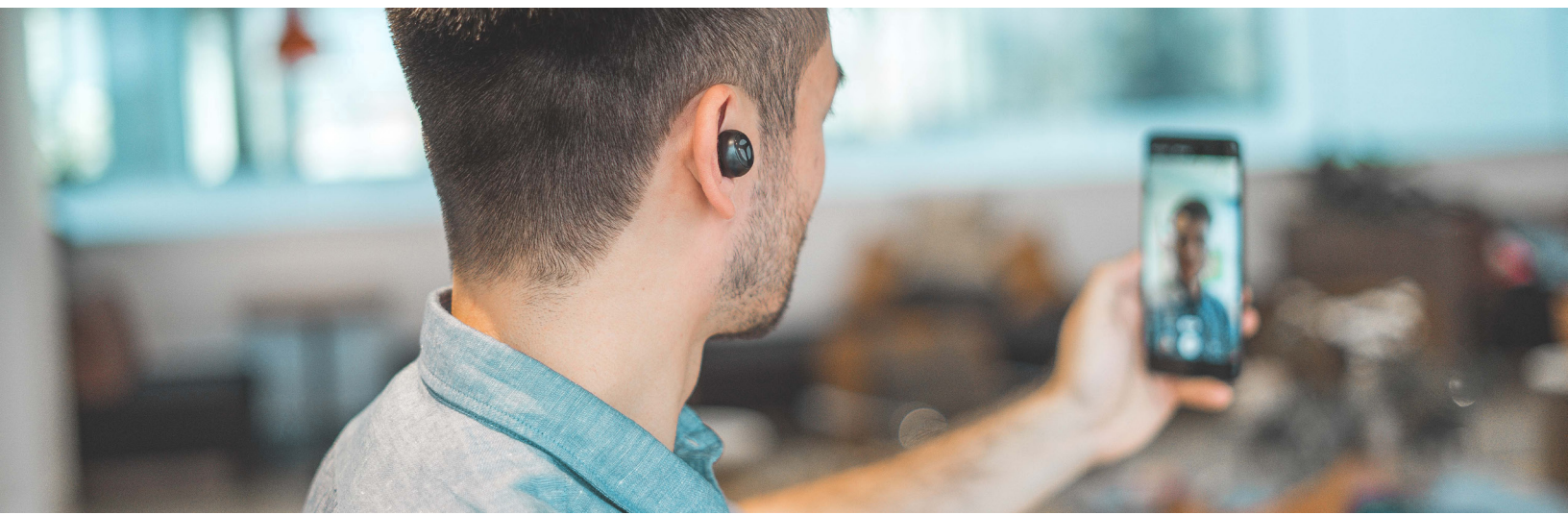
## PRACTICE MAKES PERFECT

If you're going to bring in new tools you're not familiar with, be sure to practice a run-through with another person in advance. Check for any kinks to the overall workshop format, visuals, and flow between tools before the live event.



## INVEST IN GREAT FACILITATORS

Strong facilitation skills are especially critical in a virtual environment – a good facilitator should still be able to call-out teammates by name to expand on ideas, and will ensure everyone has an equal level of input into the workshop's success. Make sure each group has its own facilitator rather than sharing facilitators across break-out sessions.







# CHOOSE YOUR TOOL WISELY

Like any software selection process, be sure to articulate in advance what requirements and features are absolutely required for the workshop's success, and which features may be more “nice-to-have” bells and whistles. Below is a list of requirements you may want to consider:

1

## **USER EXPERIENCE AND INTERFACE:**

As with most software selection, you may find yourself making a trade-off between features and usability vs pricing and access. Scrumblr, for example, is open-source and free for anyone to use, but is pretty limited in what it can offer beyond a traditional sprint planning board.

2

## **PRICING:**

If this is a one-off workshop, you may not be willing to invest in a heavy piece of software requiring multiple licenses for your team to access. Many providers are offering free access at the moment or may have free trial periods, but be sure to pay attention to any limitations on number of participants, etc. with a free account. Stormboard, for example, is free for up to 5 users, or you can register for a free trial and invite as many users as you'd like.

3

## **USER REGISTRATION:**

Some tools allow you to invite multiple collaborators via a shared link without signing-up or creating a new account. This may be particularly useful if you're only planning for a one-time event and want to avoid the hassle of having a large team register for a new tool in advance.

4

**REMOTE COLLABORATION:**

Do you need live, real-time collaboration with multiple people accessing or updating work simultaneously? Or will you plan to have one facilitator sharing their screen and managing the flow of information? You may initially think that real-time collaboration is critical, but our experience shows that having a dedicated facilitator actually helps drive engagement and structure. Either way, determine your preferred workshop format in advance and consider how that will translate to a virtual world when selecting your tool.

5

**REPORTING:**

Consider your potential need to reference your workshop activities and output. More lightweight offerings may have a time limit for accessing the same URL with your data (especially if you're using a Free Trial offer). More developed software may have the option to export your work into various formats (PDF, Word, Excel, PowerPoint), thereby reducing the need to take screen shots of your work for future reference.

6

**DATA SECURITY:**

Many SaaS are likely hosted by Amazon Web Services (AWS) and therefore held to AWS' strict data security policies. Be sure to also review the provider's data encryption policy for transfer to and from their aligned cloud service provider. In all cases, double-check that your preferred software has the necessary data privacy and security policies that align with your own organization's needs.



# VISUAL COLLABORATION TOOLS

TOOL NAME	THE PITCH	SPRINT PLANNING	IDEA GENERATION & GROUPING	LIVE COLLABORATION	WHITEBOARDING	PROCESS MAPPING	LIVE VOTING	NOTES
AWW APP	Online whiteboard for realtime visual collaboration <a href="https://awwapp.com/">https://awwapp.com/</a>			✓	✓			A simple solution for basic whiteboarding functionality. Free account allows use of three boards, which are removed after 2hrs of inactivity. Paid \$10/month subscription provides for unlimited boards & collaborators
WHITEBOARD FOX	Simple online whiteboard <a href="https://whiteboardfox.com/">https://whiteboardfox.com/</a>			✓	✓			Completely free, which means it could be overwhelmed and potentially slow for large groups
LIMNU	The online whiteboard you've been looking for <a href="https://limnu.com/">https://limnu.com/</a>			✓	✓			Another basic whiteboard solution but has more color/shape features than AWW or WHITEBOARD. Paid plan of \$10/month provides for limited boards or users
BUBBL	Bubbl makes is easy to organize your ideas, stay on task and collaborate <a href="https://bubbl.us/">https://bubbl.us/</a>		✓	✓	✓	✓		A flexible, distraction-free mind-mapping software that be used for multiple purposes. Free account includes up to 3 mind maps and image export. Paid accounts with unlimited maps and storage begin at \$4/month.
REETRO	Agile retrospectives made easier <a href="https://www.reetro.io/">https://www.reetro.io/</a>	✓	✓				✓	Offers selection of pre-formatted retro boards for user feedback. Includes analytics to compare feedback across multiple retros. Free with account registration.
TRICIDER	Collect ideas and vote <a href="https://www.tricider.com/home">https://www.tricider.com/home</a>			✓			✓	Lightweight survey tool to collect and vote on ideas. Could be used to prioritize agenda topics prior to workshop. Free with account registration.
SLIDO	Audience interaction made easy <a href="https://www.sli.do/">https://www.sli.do/</a>						✓	Popular tool for soliciting audience feedback in larger groups and/or classrooms. The QR code feature is especially helpful – participants can use their phone camera to access your survey and avoid any tedious registration.
SCRUMBLR	Open-source scrum tool to manage an agile sprint board <a href="http://scrumblr.ca/">http://scrumblr.ca/</a>	✓	✓	✓	✓			Completely free, very basic open-sourced software. Most suitable for light-touch Agile program planning.
STORMBOARD	An all-in-one digital workspace to hold meetings, monitor projects, and get work done <a href="https://stormboard.com/">https://stormboard.com/</a>	✓	✓	✓	✓	✓		A favorite pick among our respondents. Wide range of features, intuitive UI/UX design and plenty of integrations to move from project planning to execution. Free account for up to five people, 30-day trial plan for unlimited users.
LUCIDCHART	A visual workspace that combines diagramming, data visualization, and collaboration <a href="https://www.lucidchart.com">https://www.lucidchart.com</a>		✓	✓	✓	✓		Another favorite consultant pick. Although mostly knows for process mapping, Lucidchart has an extensive library of easy-to-use templates, including idea boards, swimlane diagrams and timelines, as well as numerous integrations for exporting your work. Free version provides limited shape libraries and 100 basic templates.
MIRO	The online collaborative whiteboarding platform to bring teams together, anytime, anywhere <a href="https://miro.com/">https://miro.com/</a>	✓	✓	✓	✓			Flexible canvas that can adapted for multiple purposes, especially for idea generation and clustering. Free version provides three editable boards with unlimited team members. Paid team accounts include Kanban templates, high-res exports, and Jira & Confluence integrations
BLUEJEANS	Brings video, audio, and web conferencing together <a href="https://www.bluejeans.com/">https://www.bluejeans.com/</a>			✓	✓			Potential solution if you're already using BlueJeans as your video conferencing platform. Allows for blank whiteboards or annotation of existing documents within conference calls.