

CHECKLIST +
BEST PRACTICES



Preparing + Delivering
Your Remote Session

Facilitate Virtually

Utilize this checklist to deliver remote meetings with ease. Additional tips and tricks provided!



Beginning of the Meeting Checklist

Audience: Facilitator

Identify who is in the room versus who is remote

Pro Tip: Display names visually in the room so participants remember to bring their perspective into the room

Tell participants you will call on them by name throughout session

Ask participants to self-identify before speaking

Ex, "This is Robyn. I have a question on..."

Test technology features with a check-in question/poll/raise hand

Provide a way for participants to reach the facilitator or tech support person

Quickly review the process for how you will check in with in-person and remote participants



During Meeting Checklist

Audience: Facilitator

Speak more slowly and clearly than usual

Be explicit about Purpose, Outcomes, and Agenda of the meeting, re-stating decisions that were made, actions, owners, and due dates

Reference which document(s) you are in and which page/slide number you are on for all materials and revisit often to make sure people are tracking

Use participant list to do roll call, e.g., alphabetically, rather than ask "who is on the line"

Be explicit on key points, ask people to slowly repeat key inputs

Use a checkbox or other way to track how many times each person has engaged

Poll for input by going through the attendee list

"For those of you on the line, who has something to add?"

"Sarah in Dallas--what's your read on what Sanjay just said?"

"To the group in Boston, Fred, what would you guys change about what we just discussed/decided?"

Check in with your troubleshooter/chat monitor throughout

When calling on a remote participant, say their name first, then the question

e.g., "Patti in Cambridge, in a moment, I'm going to ask you to address this question: 'How many people were impacted by this change?'"

Make a deliberate pause and check in after presenting small chunks of content

Answer questions from remote people before calling on in-person participants

Ask for disagreement, not agreement

e.g., "Who CANNOT see the screen?"

Facilitate Virtually

PREPARING + DELIVERING
YOUR REMOTE SESSION



After Meeting Checklist

Audience: Facilitator

Immediately share key notes, actions, and decisions with each group after the session to ensure understanding

"Hotwash" what went well, what could have gone better with internal team, meeting owner, participants



Tips + Tricks General Facilitation

Audience: Facilitator



Be Present

Minimize distractions

TACTICS

Manage Self - Remove distractions, “get grounded,” notice what irks, excites, or bores you

Manage Others - Model pacing and tone for each conversation



Paraphrase

Reflect back to gain understanding

TACTICS

“Shed light, not heat.”

Example 1: “What I’m hearing you say is…”

Example 2: “Sounds like there are two different views on this…X and Y.”



Seek Clarity

Ask for clarification to make sure everyone understands

TACTICS

Example 1: “I’m not sure I’m following, could you go back to (this point)?”

Example 2: “I’m seeing some blank faces, could you please clarify?”



Articulate What Is Going On

Help the group see patterns

TACTICS

Example 1: “I’m noticing about half the room has their arms crossed…”

Example 2: “The group said this decision was made, but several people keep bringing it up. What still needs to be resolved?”



Establish Safety and Manage Conflict

Invite and manage conflict to get better results

TACTICS

Ask the group to play the critic/skeptic

Example 1: “What holes would a skeptic see in our plan?”

Be the mirror, not the lightning rod. When the group yells at the facilitator, don’t take it personally.

Example 2: “I get it, you’re not happy. These three things are contentious.”



Use Silence

Give the group time to process, honor different processing styles

TACTICS

Pro Tip

[Watch the feather fall]

Example 1: “Let’s reflect on this individually for two minutes…”

Example 2: “Let’s hear from someone who hasn’t spoken yet.”



Drive for Outcomes While Staying Flexible

Facilitate the process, drive toward outcomes, and be flexible on process to achieve them

TACTICS

Construct and use a POA (Purpose, Outcomes, Agenda) to guide meeting; set up a Parking Lot to capture follow-up conversations; and establish Guiding Principles to keep the group focused

Use “we” and “your” language to remind the group it is their meeting and their time, not just the facilitator’s

Example: “We are running over time on this agenda item. Do we want to stay here and cut other items short, or should we ‘Parking Lot’ this topic for now?”