**Virtual Collaboration - Planning Worksheet**

**Describe your current typical meeting:**

|  |  |  |
| --- | --- | --- |
| How many in attendance? | Concentration and location of participants? | |
| Participant trust/familiarity? | Technology used? | |
| Typical purpose of meeting? | |  |

1. **EVALUATE the meeting** (abbreviated)

Reflect on a few recent virtual meetings. How would you rate this typical meeting today?

(Scale 1 to 5: Rarely=1, Usually not=2, Sometimes=3, Usually=4, Always=5)

|  |  |
| --- | --- |
| Meeting type: ***Fully Virtual*** OR ***Mixed******Location*** (circle one) | Rating: 1-5 |
| Meeting agenda and desired outcomes are sent in advance |  |
| Facilitators are fully prepared to support collaboration and outcomes |  |
| Facilitators ensure that ALL participants are heard |  |
| Facilitators vary techniques to keep participants engaged |  |
| There are meeting guidelines that participants follow |  |
| There is a high level of participation in the meeting from most attendees |  |
| Technology is used to enhance meeting productivity and outcomes |  |
| Meeting maintains high energy and innovative feel |  |
| Discussions stay on topic and other items are handled separately |  |
| There is minimal multi-tasking and side bars |  |
| Action items are documented and clear to all at close of session |  |

1. Themes of the lowest scoring questions

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* Gaining Full Participation
* Hearing from All Participants
* Reading the Audience
* Building Trust/Community
* Creating Open, Innovative Space
* Facilitator Preparation
* Systems/Technology

**TECHNIQUES To Try:**

* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
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**Facilitator Checklist (abbreviated)**

(meeting of 5+ people)

Preparation:

* Design the meeting to match the audience and purpose (technology, agenda, etc)
* Define the purpose and outcomes you need – clear agenda sent ahead

Here's what we're talking about, what I hope to accomplish, and what I expect from you

* Prepare for “high-priced talent”
* Be selective about invite list
* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Engaging Meeting:

* Use attendance list for Round Robin
* Give everyone a job
* Play favorites!
* Use the “3 minute rule”
* Share the mic
* Vary techniques and have some fun
* Meeting “Golden Rules” (Net-iquette)
* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Strong Close:

* Clear next steps, owner(s) and timing
* Don’t forget the parking lot
* Get feedback on what worked
* Thank those that contributed, facilitated or added extra energy
* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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312-339-2301