THE DIGITAL FACILITATION PLAYBOOK:

Insights, benefits, tips, methods, and tools for virtual workshops

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IN THIS PLAYBOOK:

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INTRODUCTION

Digitization—and the <u>pandemic's unexpected push into the world of virtual meetings</u>—has paved the way for a new approach to collaboration that is both more effective and sustainable in the long run.

Digital facilitation means helping a group of people reach their common goals with the help of digital tools. This can happen both synchronously - that is, when we all meet at the same time, or asynchronously, that is, when we collaborate on different occasions—and usually from different geographical locations.

When it comes to facilitating workshops and events, everything about our ways of working has had to adapt. Using a physical whiteboard and sticky notes are no longer possible when you're forced to work remotely.

That's where digital facilitation comes in. Like any other professional facilitator, a digital facilitator will design a meeting agenda that ensures all the participants are working together towards a common goal. What's unique about experienced digital facilitators is that they know how to leverage digital tools to make the meeting as productive and engaging as possible.

In this playbook, we'll provide you with everything you need to get started with digital facilitation (a.k.a. virtual or remote facilitation). Our ultimate goal is to show you how conducting virtual workshops can be as productive as running them in person.

1. THREE TYPES OF DIGITAL FACILITATION

Digital facilitation is commonly used by facilitators, change consultants, organizational development practitioners, and learning professionals as a way to collaborate on workshops, events, change initiatives, and learning programs.

Digital facilitation can be broken down into three formats: virtual facilitation, asynchronous facilitation, and face-to-face facilitation.

Virtual facilitation

Virtual facilitation is when a digital facilitator guides a group of people to collaborate remotely in real time.

Video conferencing tools such as Zoom or Google Hangouts are typically used during virtual facilitation.

In short, virtual facilitation takes place at the same time but in a different place.

Asynchronous facilitation

Asynchronous facilitation is when a facilitator leads participants remotely at different times. The most common way we communicate today is with asynchronous tools like email and Slack, which enable us to interact remotely when it suits us.

The shortcoming of communication tools like Slack, is that they lack features for facilitating conversations and making decisions. Conversations tend to get lost in endless threads, and it can be impossible to organize all the materials and discussions from a workshop through these types of tools. This is where leveraging a digital facilitation platform can really make a difference.

In short, asynchronous facilitation happens at a different time and at a different place.

Face-to-face facilitation

Face-to-face digital facilitation means facilitating a group of people in the same space. Traditionally, meetings take place using this method but digital tools can be used to facilitate the process rather than relying on more conventional tools like flip charts and sticky notes.

In short, face-to-face facilitation happens at the same time, in the same physical place.

2. BENEFITS OF DIGITAL FACILITATION

To understand the benefits of digital facilitation we need to look at some of the challenges and limitations of the traditional model.

Involve a limitless amount of participants

Traditionally participants could either participate virtually or face-to-face, which limited how many people could collaborate. When leveraging a digital facilitation or digital collaboration platform, there is no limit when it comes to scaling up processes to involve large groups of people from wherever they happen to be.

Create a safe environment where everyone can be heard

Digital facilitation makes it easy for everyone – even the shyest ones – to take part in discussions and voice opinions at any point. However, we can all empathize with how difficult it is to involve each member of a large and diverse organization

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in any process — let alone a complex and strategic one that involves learning and development.

In a live workshop setting, it's typical for a few people to dominate a discussion while the rest of the group sits in silence. And because most companies don't only consist of fast-thinking and outspoken personalities, it makes sense to offer people various communication channels.

People like to collaborate and learn in different ways. To truly involve all individuals within a large and diverse group there needs to be multiple ways to enable participation. By allowing people to communicate not only in person but also in writing, through pictures, and even through video, you'll be able to truly benefit from everyone's point of view.

While digital facilitation definitely isn't a silver bullet that will magically solve all the challenges associated with organizational development initiatives, it does help with the people part of the puzzle.

Co-create—it's better for business

According to research by Great Place to Work, organizations that encourage all their members to innovate can expect 5.5 times the revenue growth of peers who rely on a less inclusive approach.

Why? The key here is that no one person can possibly have the collective intelligence of a large organization. However, by finding ways to listen to the experts of different fields, you should be able to harness the skills, knowledge, and opinions of everyone in the organization and that way reach your combined potential.

If you're able to replace traditional top-down management with a culture of co-creation and collaboration, your bottom line (and bank account) will likely thank you.

Share the responsibility of documentation

Normally the facilitator is tasked with the time-consuming job of post-workshop documentation. With digital facilitation, there is no need to spend time converting notes from flip charts and sticky notes into a consolidated set of documentation. Instead, you can delegate documentation between the participants and bake it into a workshop.

Digital facilitation platforms like Howspace provide a single place to host all exercises and discussions so you can save time and focus on the process instead of busywork.

You can also encourage participants to think outside of the box and share videos, pictures, and illustrations in addition to purely text-based roundups of what was agreed and discussed. This way, the memory of the workshop will last longer on everyone's mind and even those who couldn't make it to a session can easily catch on.

Automate notifications

To make sure that things move forward in the agreed schedule, it's good to send reminders to all the participants about their personal deadlines. However, managing that process manually can take a lion's share of your time.

By automating all the important reminders, you can spend more time on things that machines can't do for you — like answering important questions and facilitating brainstorming and conversations.

Amplify the impact of your workshop and events

Digital facilitation lets you work beyond a workshop or event. Discussions shouldn't be limited to a defined time and place, but rather precede beforehand and continue afterward.

With digital facilitation, you can encourage active conversations and activities before, during, and after sessions, giving participants more time to reflect. This creates social connectivity among participants, which translates to increased motivation, involvement, inspiration, and engagement.

This is especially beneficial for organizational development programs that need each person's buy-in. With digital facilitation, there is no "one and done" event. Instead, you can use an incremental approach and truly test out new practices throughout an organization and continue to receive feedback and iterate.

With Howspace it's easy to facilitate the process
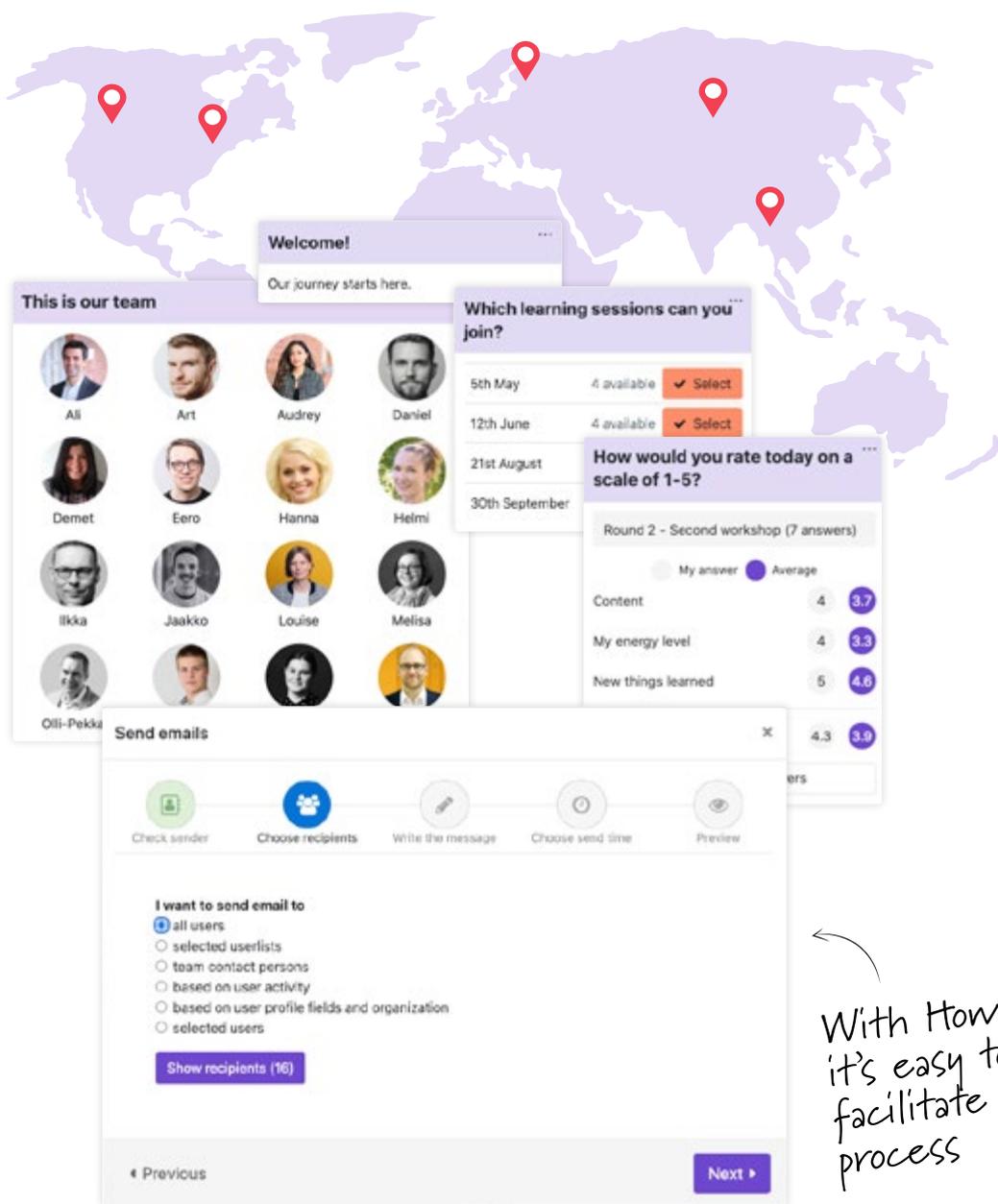
3. HOW TO FACILITATE A VIRTUAL WORKSHOP

There are many nuances when facilitating a workshop virtually versus in person. Besides being an expert on using digital tools, there are several other things to consider. These are our top tips on how to facilitate a virtual workshop or event.

Provide clear instructions and expectations

Just like we need to set rules and expectations for workshops in a physical space, we also need to provide clear instructions on how we communicate with each other during a virtual meeting, and on any digital collaboration platform.

It's critical to convey instructions both orally and in writing. Information and questions posted on digital collaboration platforms must be extra clear since you may not be immediately available to clarify. A quick way to ensure clarity is to have a colleague read your instructions to check if any questions arise.

There may be questions about how to use the technology, such as cameras and microphones, how to handle questions, and requirements in terms of communication and participation. If you are in a video meeting, make sure you have the same rules

for everyone. For example, instruct participants to keep their cameras on or off and when they have the opportunity to speak.

Create a secure environment and conditions for dialogue

Being an active participant in a physical room where you can see and read everyone's reactions is very different from turning on your microphone and speaking into the "ether" during a digital meeting. Even posting a comment on a digital collaboration platform can feel uncomfortable if you don't trust the people you are communicating with.

As a digital facilitator, it is your job to create conversation security in different ways. If the participants do not know each other well, spend time on icebreakers or other pre-engagement activities. You can also contribute to safety by providing quick and positive feedback to those who actively contribute.

You should also inform all the participants about how meetings are being documented. If it is recorded—share how the recording might be used. It's also a good idea to provide transparency on who has access to see what is written in your digital facilitation platform.

It can be difficult to create natural dialogue in a virtual meeting. That's why it is important that the digital collaboration platform you choose, provides you the conditions to create a dialogue between the participants in a simple and clear way. Different topics should be kept separate so that everything is not mixed or lost in a single conversation thread.

Utilize the digital platform for communication before, during, and after a workshop

An excellent way to build momentum for a workshop or event is to create pre-engagement communication. It's also valuable to think about what the participants can do beforehand to be able to start effectively when you have limited time together online.

You can utilize a digital facilitation platform before a meeting to do several things: help participants get familiar with each other, share the agenda, start a discussion, or obtain valuable information from the participants such as questions, requests, goals, skill levels, ideas, additions to the agenda, etc.

Simultaneous meeting time, whether it is a physical or virtual meeting, is limited and should be used as efficiently as possible. That's why it's truly beneficial to supplement your facilitation toolbox with an effective digital collaboration platform where you can deal with issues that do not take time away from a meeting. Digital facilitation platforms like Howspace make it easy to track feedback and engagement instantly and over time.

After a meeting, the platform can be used to share documents or to close cases that were not discussed during a meeting. Whether it's documenting activities or answering additional questions, a digital facilitation platform can be the hub to extend discussions and reinforce the impact.

Workshops are usually hosted to achieve a common goal, whether that's a change in an organization, improving ways of working, facilitating learning, creating

alignment, or sparking ideas. The digital facilitation process can serve as a conduit to start putting all your goals into practice, well beyond a workshop.

Make sure everyone's voices are heard

As previously mentioned, one advantage or leveraging a digital facilitation or collaboration platform is that there is no limit to the number of people you can invite. For virtual meetings, the bandwidth is limitless in principle, but as the number of participants increases, the call space is also reduced.

This can lead to people becoming unengaged, or even worse, tuned out. Inactivity causes meeting participants to lose commitment and focus. We've all been guilty of it.

As a digital facilitator, it's your job to try and let everyone's voices be heard. This is another opportunity to take advantage of a digital collaboration platform. You can use the platform to invite participants to share their ideas, questions, and experiences before, during, or after a meeting.

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Some platforms even let you instantly create polls or surveys, where you can quickly gather everyone's opinion during a meeting. A simple digital voting function that can also provide quick decisions, which in addition activates everyone.

Document the conversations

Now that we've established that digital facilitation platforms allow you to share the burden of documentation and document in real time, it's important to put this in practice, and not do it as an afterthought.

Pre-assign the responsibilities and give clear instructions on how and where any documentation should take place. This way everyone is prepared to share in the reporting and it is clear who contributed what. This makes it easy for follow-up activities and ideas.

When more people participate in documenting, fewer things will be missed, while involvement and engagement increase. Not to mention, the meeting leader will have more capacity to focus on the things that matter, and save time from post-documentation.

Vary the methodology

People tend to have a shorter attention span when it comes to working in a digital environment. It's also much harder to tell what the energy is like in a group. There are several distractions and interruptions that can happen, which makes it difficult to focus and easy to miss things. From the all-too-familiar faulty internet connections to unexpected construction noises, or children barging into your "office".

This makes it crucial to vary your virtual meeting and facilitation methods— everything from how you talk to how you share information.

A simple way to do this is by posing a question and asking participants to write their answers on a collaboration platform. You can take it a step further by allowing

participants to actively respond to each others' responses. You can even instantly create a word cloud to visually see the responses. This helps with social learning.

Another method you could try is voting. During a virtual meeting, you can do this by hand-raising through video conferencing cameras or by utilizing a digital voting feature where the answer is displayed in real time and can be visually displayed on a graph.

Group discussions are also tough to tackle during virtual meetings. One way around this is to let 3-4 participants talk to each other about a topic, while the others listen. If a "listener" would like to jump into the conversation, he or she can virtually raise their hand.

Ask for feedback and iterate

Each organization's process is different, which is why it's important to stay open to feedback and iterate as you go along.

Digital facilitation platforms like Howspace make separate feedback forms obsolete and instead allow you to build a feedback loop directly into a workspace. Depending on the sensitivity of the feedback you're gathering, you can decide whether or not the comments will be available for everyone to see.

Managing physical meetings can be a challenge, even though it has long been our most common form of collaboration. Many people are unaccustomed to leading meetings with the help of digital tools, which is why it is also important that we focus on developing our competence around it. An important part of learning comes from experience and learning from each other. A fantastic way to continually develop your facilitation leader skills is to gather all meeting leaders at a regular cadence to jointly build a common knowledge bank.

4. FACILITATION METHODS

There are a plethora of facilitation methods varying from simple to very complex. Most of them can be recreated with one or a combination of digital tools. These are a few examples for inspiration.

Double diamond: Problem-solving and ideation

The Double Diamond approach is used for problem-solving and ideation. It is a structured approach to tackle challenges in four phases:

1. Discover/Research— insight into the problem (diverging)

2. Define/Synthesis — the area to focus upon (converging)

3. Develop/Ideation— potential solutions (diverging)

4. Deliver/Implementation— solutions that work (converging)

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With this method, you approach problems and solutions by using two different types of thinking: divergent and convergent. During a diverging phase, you try to open up as much as possible without limiting yourself, whereas a converging phase focuses on condensing and narrowing your findings or ideas.
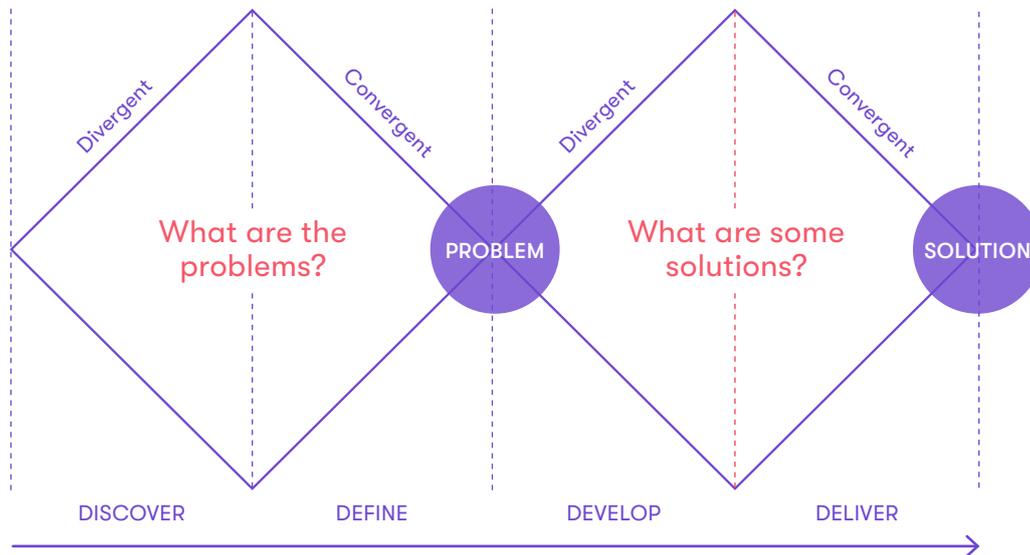

HOW TO DO IT DIGITALLY

For the Double Diamond strategy, it's really beneficial to spread out the phases and activities, by combining asynchronous and synchronous work.

On Howspace, we do this by:

1. Gathering ideas on the platform before a face-to-face or synchronous meeting and allowing participants to add additional ideas that may come up after a common meeting.

2. Next, ideas can be prioritized and filtered by polls, likes, or giving points.

3. All project phases can then be documented on the go, in a single Howspace workspace.

4. The same workspace can be used to continue the delivery phase.

Digital facilitation also allows you to scale participation for a large group of users. Even if other employees or other stakeholders can't attend a workshop, they can still be invited to give input or help to prioritize ideas.

Another benefit of leveraging a digital facilitation platform like Howspace is that you can anonymize participant comments at any phase, which can add an additional layer of security and openness.

Anonymized comments
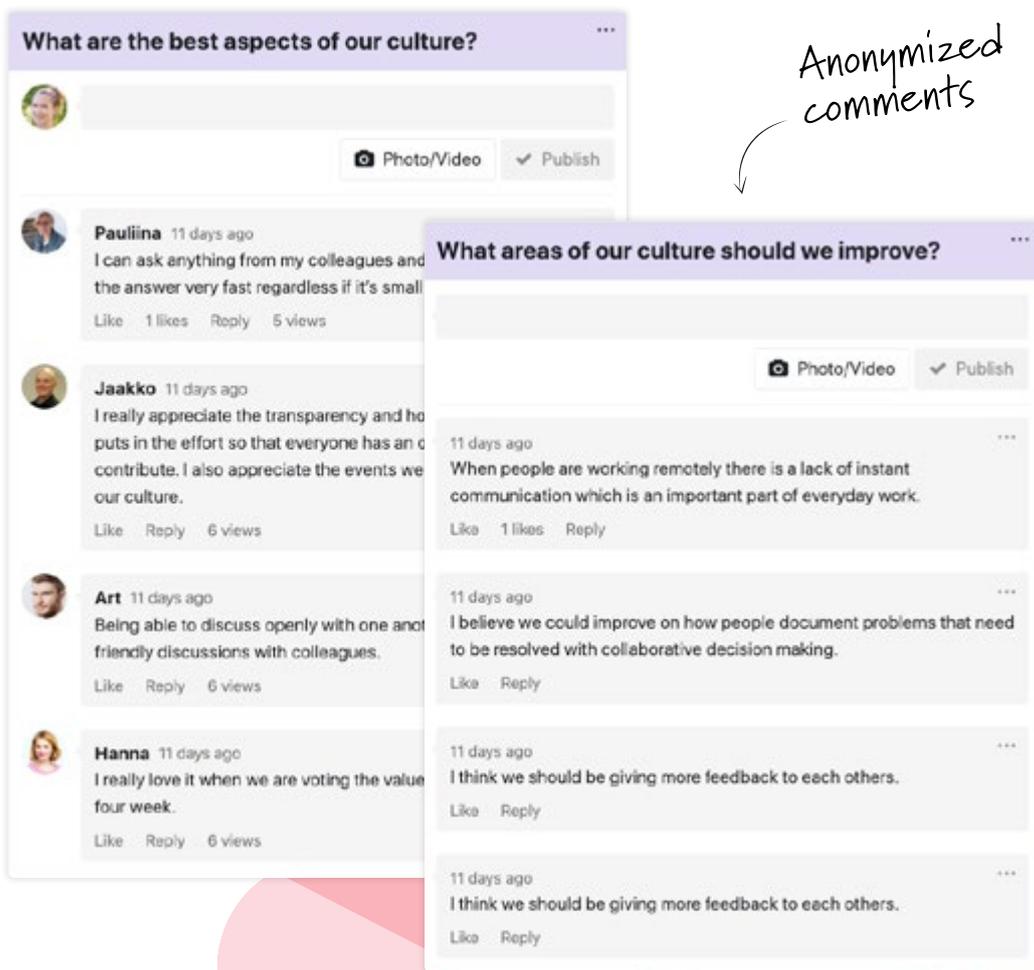
Open space: Engagement and participation

The Open Space facilitation format is designed for self-organization, inclusivity, and emergent agendas.

One major characteristic of this approach is that a session starts without an agenda, but the process is designed to ensure that the issues that are most important to the people involved will surface and become part of the agenda.

The key question to ask is "What are the important things we should talk about to improve?"

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OPEN SPACE CONSISTS OF FOUR PRINCIPLES
AND ONE LAW. THE FOUR PRINCIPLES ARE:

1. Whoever comes are the right people

2. Whatever happens, is the only thing that could have happened

3. When it starts is the right time

4. When it's over it's over

</div>

The law is called "The Law of Two Feet." The idea here is if at any time you find yourself in a situation where you're neither learning nor contributing, use your "two feet" and go somewhere else where you can.

HOW TO DO IT DIGITALLY

Traditionally Open Space is highly dependent on the ability to meet physically, but with today's technologies available, there are many opportunities to digitize parts, if not all of the process.

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Quite often, the first part of the process is done beforehand and asynchronously. Here's an example of how we do this on Howspace:

1. Invite participants to propose topics as chat comments.

2. Participants can like a comment to show their interest or agreement. Another way to prioritize is by using Howspace's voting or polling features.
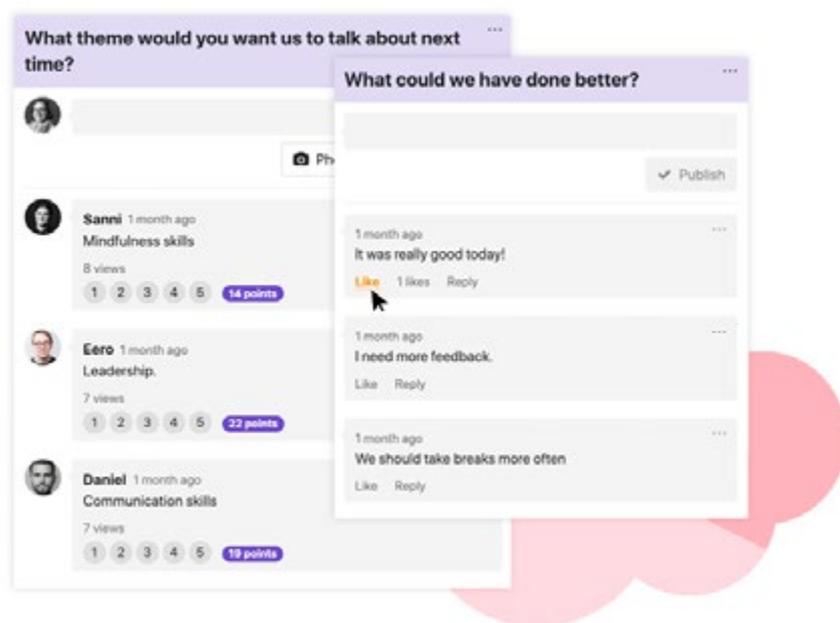
3. The facilitator can then organize the topics by likes or votes and decide how many topics will be covered in a given session.

4. From there, the facilitator can create a loose agenda and assign the host of each topic as the person who created the original comment. Howspace's booking feature can also be utilized for choosing which topic participants will start with.

5. A separate page within a Howspace workspace can be dedicated to each topic, where you can document everything, and even attach instructions, images, videos, or any other file type. If doing a session virtually, you can utilize a video conferencing tool side-by-side with Howspace.

Whichever live method you have in mind, it can be used as a starting point for designing your digital workspace. If you are used to attaching sticky notes to a wall, one way to do this virtually is by creating anonymous chats side-by-side to add ideas in different categories.

A digital facilitation platform creates a single hub for all documentation, where anyone can contribute, from anywhere, whenever an idea strikes them. As the creator of Open Space, Harrison Owen says, "spirit and creativity do not run on the clock."
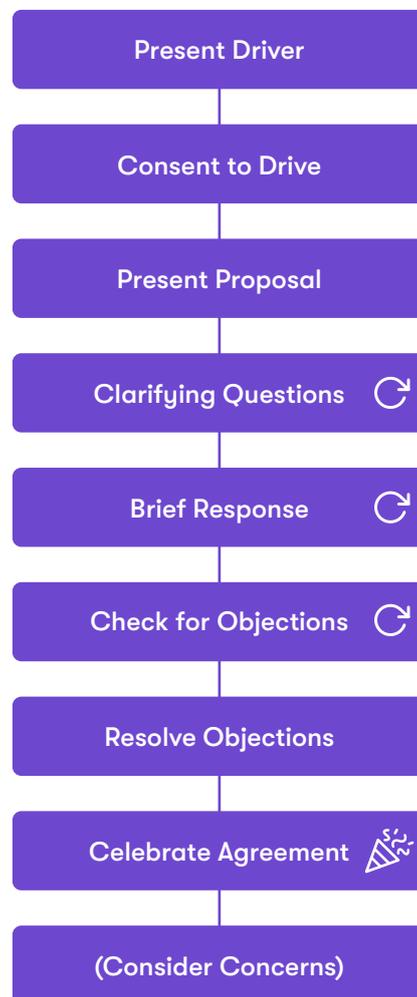
Sociocracy 3.0: Decision-making

Sociocracy 3.0 (S3) is a transformational technology that helps organizations improve performance, alignment, fulfillment, and wellbeing.

A large part of S3 is a consent decision making process that is used to propose agreements that are transparent and that everyone can stand behind.

The process includes an "implicit contract of consent" which says:

1.   In the absence of objections to an agreement, I intend to follow through on the agreement to the best of my ability.

2.   I agree to share objections as I become aware of them.

| Present Driver |
| Consent to Drive |
| Present Proposal |
| Clarifying Questions ↻ |
| Brief Response ↻ |
| Check for Objections ↻ |
| Resolve Objections |
| Celebrate Agreement 🎉 |
| (Consider Concerns) |

A final decision cannot be 51% agreement and 49% disagreement (like you can end up with by democratic decision making). Consent means "I'm willing to give this a

try" and everyone needs to be on board for a decision to be reached. Objections and concerns will continue to be discussed until everyone gives their consent, which creates decisions with 100% buy-in.

HOW TO DO IT DIGITALLY

The decision-making process following the Sociocracy 3.0 method can be used to set strategic goals for the year. Here's an example of how our clients use Howspace to digitally facilitate this process:

1. A chat is opened up on a Howspace workspace, where all participants are given an opportunity to suggest ideas over the course of a few days or weeks. A facilitator can provide pre-set categories such as brand, company culture, and internationalization, which can also be done in separate chats to keep topics organized.

2. Howspace's chat AI clustering features can create a summary, theme cluster, or a word cloud of a chat, which can serve as a starting point for a discussion during a virtual or face-to-face meeting.
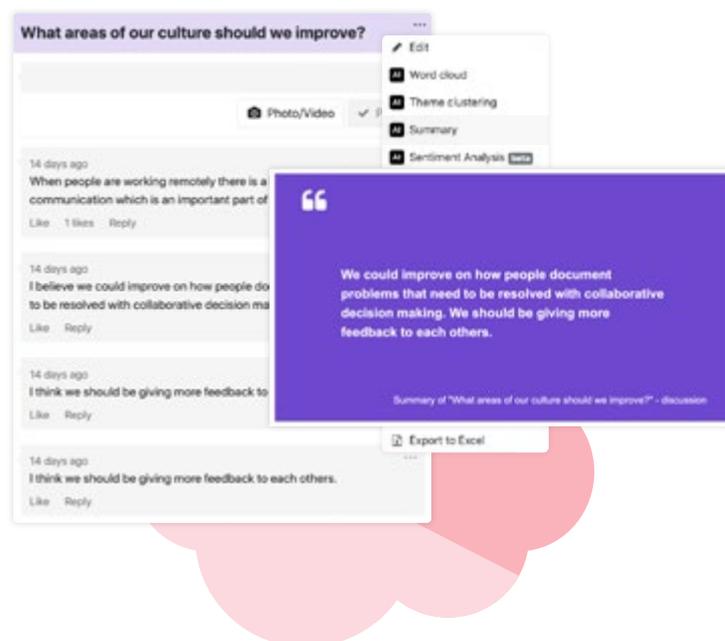
3. From there, every topic can be discussed in smaller virtual groups that discuss the summary, build on the content, and create suggestions that the group is happy with. Howspace also has a booking feature, in case different sessions need to be scheduled.

4. Once all the suggested goals have been discussed, groups can post the final suggestions in Howspace and create a vote. This helps to prioritize, voice any objections, and make immediate decisions.

5. Objections should only be given, with an improved suggestion. All objections and concerns can continue to be discussed on a chat.

6. Finally, participants can quickly vote again until everyone gives their consent, and only then will a decision be made.
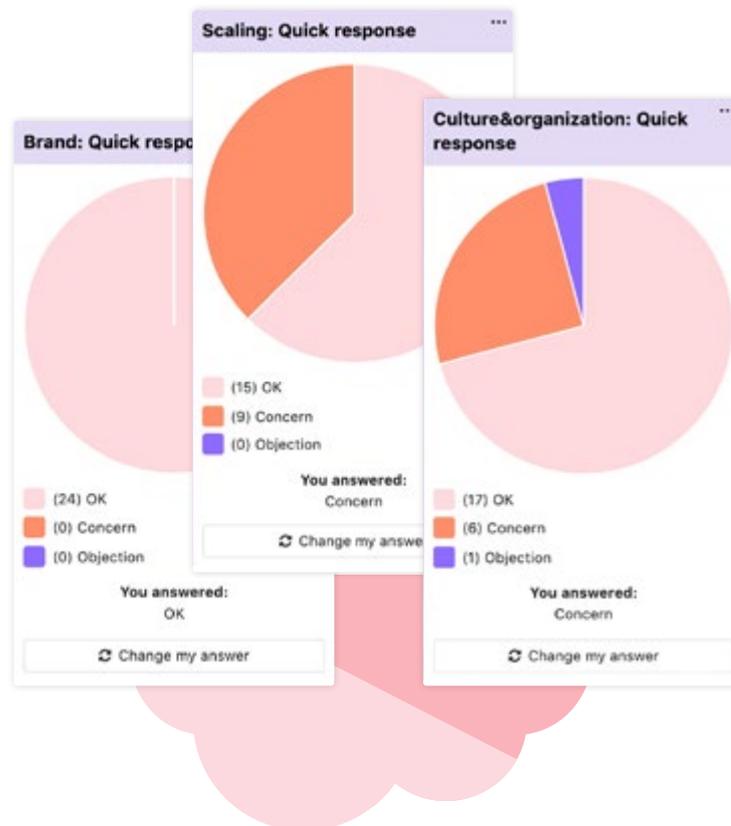
5. DIGITAL FACILITATION TOOLS

As a digital facilitator, it's important to know what tools are available to you, and how to effectively use them. There is an overabundance of options, but here are some popular ones broken down into different categories.

Video conferencing
ZOOM, TEAMS, GOOGLE HANGOUTS

Survey tools
GOOGLE FORMS, TYPEFORM, SURVEYMONKEY

Whiteboarding / Post Its
MIRO, MURAL, STORMBOARD

Note-taking
EVERNOTE, WUNDERLIST, ONENOTE, GOOGLE DOCS

Audience engagement
MENTIMETER, SLI.DO, STORMZ

File storage and sharing
GOOGLE DRIVE, ONEDRIVE, DROPBOX

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Collaboration and dialogue facilitation

[Howspace](#) is the only tool available that allows you to facilitate a dialogue. It was built specifically for digital facilitation, and you can do almost everything in the set of tools we just shared, all on a single platform:

- ⊘ Pre-engagement: Create agendas, pre-communication, and activities

- ⊘ Note-taking and documentation

- ⊘ File storage and document sharing (videos, images, documents)

- ⊘ Surveying, polls, pulse, and checkpoint questions

- ⊘ Chat with facilitator-specific features (anonymize, voting, hide comments, etc)

- ⊘ Dialogue AI summaries (theme clustering, summary, word cloud)

- ⊘ Assignments, exams

- ⊘ Booking system and timer

- ⊘ Post-engagement through ongoing discussions and activities
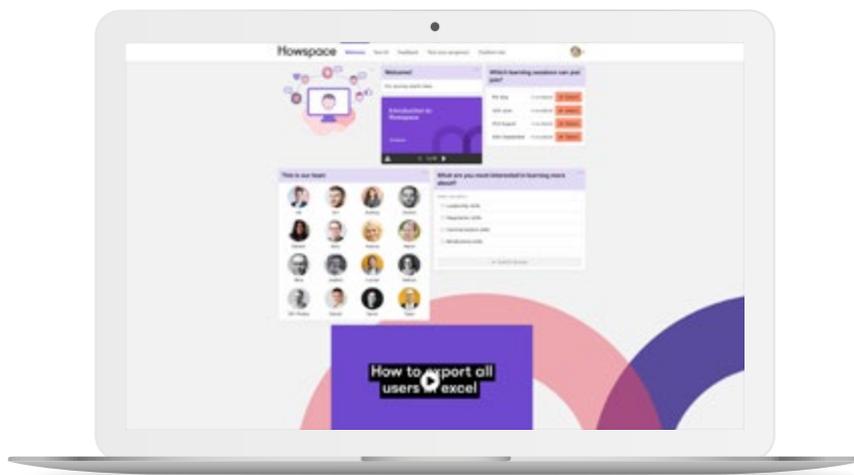

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Combining tools

Many virtual facilitators combine the tools mentioned above. A typical combination is utilizing a video conferencing tool side-by-side with a separate digital facilitation platform like Howspace.

In large virtual workshops, it's advantageous to use different tools just like you would in a live setting. Perhaps answering questions through a virtual poll would be more effective and efficient, since it won't take away time from a live meeting. How about whiteboarding on a tool like Miro, and then dropping into your digital facilitation hub?

Sometimes writing can be more effective than talking. This is an opportunity to post ideas on a digital facilitation platform and create groups or workspaces based on them.
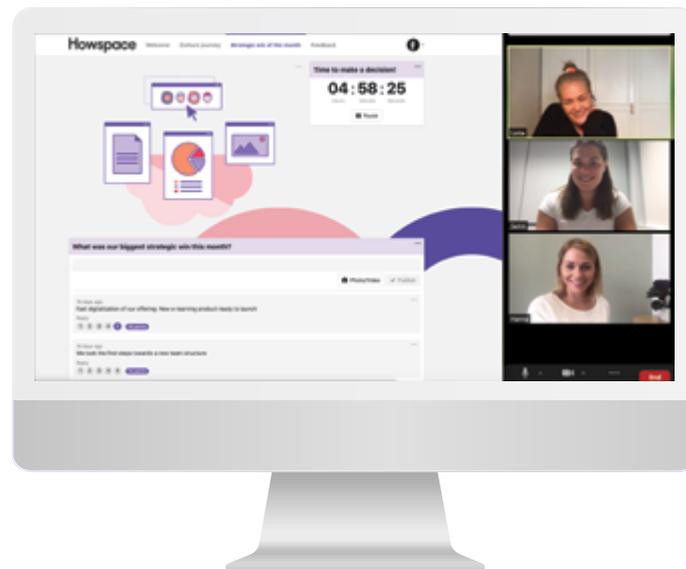
⊕   **PRO-TIP:** Create a script for yourself which reminds you when to use each tool, and clearly communicate that to participants as well. Don't forget to test new tools and tool combinations with a colleague beforehand, so that you can start a workshop relaxed and with a plan in mind.

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CONCLUSION

As the world catapults towards digitization, digital facilitation will increasingly be crucial to our ways of working. We hope this playbook has given you the insights and tips you need to effectively virtually facilitate anything from small group meetings to large-scale events.

If you're ready to dive into digital facilitation, why not give Howspace a try? You can build a free workspace for your workshop or event right now.

Start your free Howspace trial →

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www.howspace.com