

Online Facilitation for Inperson Facilitators

Bill Harris
Facilitated Systems
<http://facilitatedsystems.com/>

March 24, 2000

Abstract

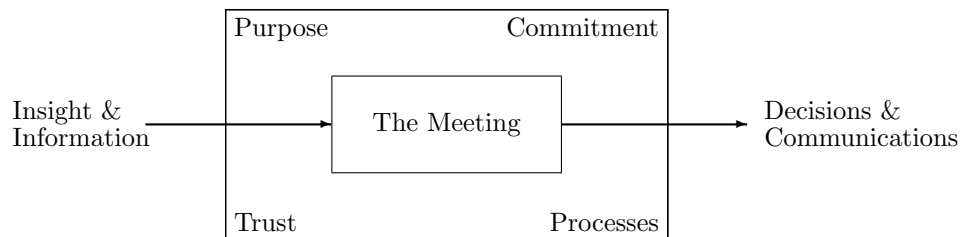
Many view online meetings as second class alternatives to inperson meetings. My experience suggests otherwise; online work has advantages over that done inperson. This essay offers experienced inperson facilitators ways to think about the benefits of online meetings.

Common meeting elements

Common wisdom holds that online meetings are less effective than inperson meetings. You can't get as much done; you can't work as fast; you can't build trust; you can't fix meeting problems. Why? Because you are limited to the single dimension of a phone call, a video connection, or a bit of text on a screen.

I've found that view to be limiting. Online meetings share common elements with inperson meetings. Those elements can be used in ways online that give them more productive power.

What are those common elements?



Successful inperson meetings require a *clear purpose* and *commitment to keep the group focused* on that purpose. Focus may be driven by an independent facilitator or by the group leader, or facilitation responsibilities may be shared by all group members.

Commitment to the team and its purpose requires some level of *trust*, which itself is based on openness and knowledge of each other.

Successful meetings require a *linkage from the outside world* into the meeting. Information must be available to help with decision making or problem solving. People's insights must be brought to bear on the issue.

Successful inperson meetings follow various *processes* to be more effective. These include effective problem solving techniques, information solicitation techniques, and team building activities.

Finally, if the team is to do anything, there must be some *linkage from their results to the outside world*. Action items may be created and assigned; information may be disseminated.

All of these elements exist online, as well, where meeting participants may be spread across the world, linked only by a Web site or mailing list. Certainly the online facilitator must become familiar with various specialized technological tools, but the important part remains aligning the meeting design and execution with the meeting purpose and group culture. A successful online meeting occurs because that alignment works, not because the technology dazzles.

Facilitation differences

The two environments do demand different approaches and provide different benefits, often favoring online work. Here are some differences I've seen.

Temporal design and speed

There are two main categories of meetings. Synchronous meetings happen at the same time for all participants. Typically one person talks while everyone else listens. Then someone else talks. Most inperson meetings fall in this category, as do teleconferences.

Asynchronous meetings don't require everyone's simultaneous presence. Such a meeting may last several days, with people joining, catching up, and contributing when it fits their schedules. They are typically conducted by email or asynchronous Web conferencing.

Asynchronous, online meetings usually start more slowly. (Pacing in synchronous meetings doesn't differ much from inperson meetings.) In a *real* meeting, everyone shows up at the appointed time (well, usually), and work starts immediately (well, almost always). In asynchronous, online meetings, it takes time for messages to move from one person to another. That can make it seem like the process will be slower.

Such asynchronous meetings can actually produce output much faster. In the beginnings of project management, the emphasis was on organizing and arranging tasks so that everything got done in a logical order. Speed came by shortening individual tasks. We have evolved towards concurrent engineering, where speed is gained by putting independent tasks in parallel, a far cheaper approach.

That's what online meetings can bring: cheap speed. Individual dialogs aren't necessarily quicker, but you can run multiple conversations in parallel without confusing people. That lets you work faster overall. Inperson, those side conversations tend to interrupt progress.

How does a facilitator take advantage of this without creating confusion?

- Stagger task starts.
- Run different conversations in different spaces.
- Have different facilitators for the different parallel topics.
- Use different channels for the different media.
- Use different subject lines for the different conversations.

Some of those are inexpensive and easy; some cost more. Pick the one that meets your purpose, or combine them creatively. See what happens, and adjust your pacing far enough ahead so that you stimulate actions when you need them.

Sensing and responding

Many notice the lack of familiar perceptual cues in the online world. As a facilitator, you can't see who is falling asleep, who is reading email, who is carrying on a side conversation, or who has left the meeting. You certainly can't see whether people who aren't participating are angry, bored, or simply missing due to other work.

The lack of clues affects the participants, too. If you are a physically charismatic facilitator, you may be used to engaging people through your repartee, your mannerisms, or your dynamic behavior. Those physical activities don't carry across to most online spaces.

How do you tell, inperson, whether someone in a meeting is bored? It's largely a matter of observing cues (yawns, eyelids shutting, etc.) and making assumptions. We have much practice in doing this, as most of us have interacted inperson daily for as long as we can remember. What we may not always remember is that those assumptions are dangerous—a yawning person may really be tired, not bored—and that we should attempt to verify our more important assumptions.

The same pattern holds in online spaces, except that we have far less practice in interpreting actions. That could be beneficial, as it may lead us to check out our assumptions more often, but the risks of not checking are higher.

The key is to observe behaviors (usually visually, not aurally, when inperson), make hypotheses, and then verify those hypotheses. When we understand how people are responding, we can tailor our facilitation appropriately.

Online spaces (especially asynchronous ones) offer more options for checking assumptions than do inperson spaces. If you stop to ask someone if they're bored in a face to face meeting, you interrupt the flow of the meeting. In an online, asynchronous event, you can use the phone, email, or text chat to

engage the person without disrupting the flow of the main conversation. Some synchronous spaces offer participants the option of giving the facilitator clues (“Speed up; this is elementary,” or “Slow down; I’m getting lost.”) You can make notes about observed behaviors without others (or you) being distracted by that activity. You have more time to craft interventions to correct problems.

Spatial design and diversity

As inperson facilitators, we often think of our work as being done in a conference room or perhaps a set of conference rooms. In reality, the environment of the people with whom we work (the social system with which we’re dealing) is far larger, encompassing conference rooms, offices, hallways, the cafeteria, even restrooms and locker rooms—all the places people talk. Some of the work outside the conference rooms is not explicitly work-related, but it builds trust and relationships. That leads directly to results in the conference room.

Online environments can encompass multiple venues, too: asynchronous Web conferencing, email, mailing lists, phone conferences, video conferences, and text chat. We can make use of several of these to provide separate spaces to accomplish work, spaces to learn, and spaces to evaluate each other and build trust. As in the face to face world, that lets us have focused business meetings and develop or maintain trust, without one activity interfering with the other.

In my experience, one should concentrate the diversity in either the online or the inperson environment. If much of the work is done inperson, but some (perhaps by necessity) is done online, then the online component always seems to have second-class status.

For example, I’ve seen groups with a larger subgroup in one city and another, smaller subgroup in another city. Both subgroups have all the typical range of interpersonal work: meetings, chatting in the hallway, and talking at someone’s desk. But conversation between cities is largely limited to phone conferences, and those, for some reason, focus on business issues. Occasionally people from one site travel to the other.

The result? The team remains largely split, because the casual information sharing that is important to team success rarely crosses between subgroups. Often the smaller subgroup feels the most isolated.

Perhaps it’s caused by our familiarity with inperson work. When we can work in both ways, there’s a great temptation to do certain types of things (including building trust) inperson. We reinforce that by putting people together temporarily through travel. Because of familiarity, we feel good about such inperson work, and we tend to believe that more travel would solve our problems. Lacking large travel budgets, many teams remain split along geographic boundaries.

As a result, I get more nervous when I see a team split into two groups than when I see a team that has none of its members located together.

Conventional wisdom suggests starting a group with an inperson meeting. I’d suggest starting in the online environment. We all have experience dealing

with the inperson methods, so moving *into* that environment is easier than moving *out* of it.

Building trust

One of the first things most of us do in meetings with new people is to have introductions. Everyone thinks up something to say on the spot, most of us don't pay a lot of attention to others because we're trying to plan our own introductions, and we get to know each other later over coffee or snacks.

In the online space, you can have each person introduce themselves with a brief but persistent bio, posted on a Web page. People can think about how to introduce themselves, and they can modify it later, when they are suitably inspired.

These introductions remain available during the entire time the group works together. That helps people make connections all during the meeting, not just at the beginning.

But introductions aren't sufficient to engender trust. For that, we need to see how others behave in a variety of situations. Often we do that through play. We kid people and see if they become offended (or if they cross any key boundaries when they kid us). We create small, fun, unimportant tasks to share to see their commitment to team effort. We go places together to have the time just to talk about ourselves, which builds on the introductions done at the start.

We have been acculturated to avoiding play on computers, at least while we're at work, lest we be seen as misappropriating company resources. Yet that play has an important role in group work. Be creative in considering a broad range of play activities expressly focused on building trust and forming teams.

Accessibility

I once knew a manufacturing engineer who asked some test technicians what problems they found in testing a certain line of products. They gave a few answers, none significant. Then the engineer took data on what parts were replaced in the test process; one part stood out with a very high failure rate. When he asked why they hadn't told him about that part, they said, "Oh, that's not a problem. We replace those every time."

Similarly, there are distinct problems with inperson meetings that we don't see because we deal with them almost every time we meet. They include

- The need to synchronize schedules
- The need to be in the same physical place
- The need for the appropriate information

With people becoming increasingly busy, getting the same free time on several people's schedules is hard. Even the act of searching through calendars to find possible meeting times takes away from productive work.

In many situations, getting common times is only the first step. You also need to get the people in the same place. If everyone works in the same building, that may be easy. If some are out with customers or work in different offices, you have to schedule time for the commute plus time for the meeting. If some work in different locations, you need to allow time and money for travel (or relocation, if you're dealing with longer term projects).

Once everyone is together, you need the appropriate data to make decisions. Sometimes that's in papers you brought, but sometimes it's on a computer or in a file at someone's desk. Sometimes the information must be generated by running database queries. You either stop the meeting to get the data, or you assume that you can make the appropriate decisions based on the collected wisdom in the room (occasionally known as "winging it").

If you work in an asynchronous, online environment, you don't have to worry about any of these things. Each member can work when it fits their schedule and their personal working style. You don't have to worry about interrupting someone's productive work with a meeting or conversation. If it's all done asynchronously, each person can choose when to participate. The number of synchronous connections can decline.

If you need access to data, the person closest to it looks it up. This needn't cause analysis paralysis; the online environment allows you more freedom in deciding what data is appropriate by making the cost of obtaining data more uniform.

How to choose between online and inperson

There are valid ways to choose whether to work inperson or online. Inperson work has certain strengths:

- Familiarity
- Informality (no technology needed)
- Ability to read non-verbal cues
- A natural information constraint

That last one requires explanation. Inperson, we are limited by the number of words that can be spoken in the time allotted to a meeting. That limits the number of ideas to consider and keeps us from becoming overloaded.

In asynchronous, online events, we can have multiple streams of textual and graphical information coming our way, seemingly without limit. As long as it remains manageable, we may find that to be good. Above some limit, we lose the ability to process it. Inperson meetings provide a natural limit. That may be one reason managers often prefer inefficient meetings to written reports. The act of getting a topic on a meeting agenda is a prioritization process that weeds out things a manager doesn't have time to consider.

Here is a table of reasons that might help you select the appropriate meeting mechanism.

Inperson	Online
Everyone is present at the same time and place	You must deal with multiple issues in parallel
You want to meet <i>now</i>	You need flexibility in people assignment across geographic boundaries
You need to limit information transfer	You need to lower your costs in a distributed team
Your success depends upon casual interactions; your participants aren't computer oriented	You sit together, but interruptions hurt productivity
	You need to maximize group productivity in the longer term

A final reminder

Facilitation is an art, much like theater or music or sculpture. In the online world, you are designing a space that is both permanent and ephemeral. The structure may remain in an archive, but the experience of being in the dialog can't be repeated.

If you do the same thing each time, it will bore. You'll get stale results from stale processes. If you change without reason, you'll lose your audience.

Design a space for your meetings that meets your purpose and adds something extra that can draw out what your group wants to produce. Use the best of the approaches that have been developed over time, but don't get carried away with fancy techniques that overwhelm your purpose. Ruthlessly subjugate your techniques to your purpose.

But don't be afraid to try something different, when you find something that has that spark of creativity which will ignite your group into better work than they thought possible.