

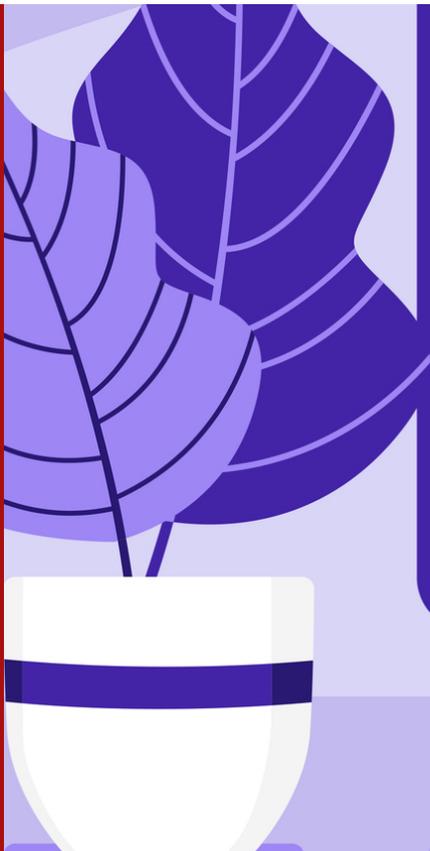
**Group Brainstorming Summary:**

# **Best Practices for Delivering Remote Meetings**

**Prepared by:**

**David Freeman Consulting Group**

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# Accelerated Learning Through Crowd-Based Facilitation

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On May 21st, 2020, the Professional Development Consortium held a first-of-its-kind virtual brainstorming event entitled: "*Collecting Best Practices for Designing and Delivering Engaging Virtual Training Programs and Meetings*".

Over 80 top training and learning professionals attended this highly interactive session, which was designed and facilitated by David Freeman J.D. of David Freeman Consulting Group, Ian Nelson from Hotshot, and Kristin Heryford from Cooley.

By the end of the program, the group generated nearly 100 tips, techniques and insights into how to design and run high impact remote programs. The following pages contain a lightly edited version of their input.

In no way is this meant to be THE comprehensive guide, but rather it's an initial collection of approaches gathered through a virtually facilitated process.

Which means, as a living document, we welcome your ongoing contributions. If you have nuggets to share, please reach out!

You can contact David Freeman at [dfreeman@davidfreemanconsulting.com](mailto:dfreeman@davidfreemanconsulting.com) or 310-773-7691.

# Preparation

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- Ask participants to complete a Survey Monkey about the substantive topic in advance so they are prepped for the session and you can tailor the content to their interests.
- Assign pre-work for lawyers (e.g. Book Club without A Book; circulate an article, video, TED Talk and meet in peer groups or mentoring circles to discuss the topics).
- Be sure to have a tech person/producer at every meeting to run the show for the presenter.
- Organize run-throughs with speakers, AD team, and AV team to test technology and session flow at least one day prior to training.
- Meet 30 minutes before the session to work out glitches.
- Offer sessions with an IT trainer to presenters to gain confidence.
- Practice use of the various features, e.g. know how to mute people.
- Make sure the presenter has a call-in number in case video gives out.
- Develop a lesson plan for presenters so there is less for them to do.
- Have plants prepared with questions.
- Have an agenda. Clearly designate who is planning to speak and when. Awkward pauses are worse in virtual training.
- Checklist for effective virtual conversations (EVC book Jennifer Britton - <https://www.effectivevirtualconversations.com/>).
- Create a quick reference card to train the trainers.
- Run of Show Script is SO important!
- Review PowerPoint decks that were used in live presentations. They may not work as well when the screen is being shared. Shift text and images to the left to leave room for the presenter's face.

# Preparation (cont.)

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- Prepare chat questions to facilitate engagement.
- Consider planning self-directed training programs for asynchronous learning. [Click here](#) to receive an ebook from Hotshot containing tips and resources for designing and delivering synchronous and asynchronous training programs.
- Have a program delivery tip sheet.
- Have a presenter tip sheet.
- Deliver a participant tip sheet and conduct training.
- BlueJeans Events was a useful platform for a new counsel retreat. It allows you to control mute/video and the organizers can chat "behind stage"
- We preferred Zoom over Webex.
- A big project involves overseeing a lot of moving parts, oftentimes from different people. To have a successful rollout, project managers rely on a well-crafted project plan to ensure objectives are met on time and on budget. A project plan is a formal approved document which is used to define project goals, outline the project scope, monitor deliverables, and mitigate risks.

# Sample Meeting Lengths

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- We ran a program for 3 hours with breaks.
- Tried 45-minute programs and incorporated Q&A along the way rather than at the end.
- We initially started with 60-minute town halls/homerooms and changed to 30 minutes.
- We are doing more 45 minute programs - only issue is CLE.
- 30 minutes is more effective - reduces "Zoom fatigue."
- I'm finding the first 5 (sometimes 10) minutes are now more social (in live situation this would have occurred before the formal start), so 30 minutes would be too short. As long as it's interactive, 45-60 minutes has been good. And if we finish early, great!
- We had a couple of 30 minute meetings, with the presenters staying online for Q&A after the 30 minutes.
- We are mixing topics that ordinarily would not go together to keep people interested and to keep people for 50 minutes.

# Meeting Flow and Facilitation Techniques

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- Have a good cadence during sessions.
- Use a moderator for the back and forth conversation to help with flow.
- Have more than one instructor to make it more interactive.
- Encourage back and forth conversation between the presenters rather than each one lecturing for several slides at a time.
- Encourage speakers to alert attendees they will be stopping for Q&A in a moment and to start putting in questions. Our platform, BlueJeans Events has a 20 second delay so giving this warning usually helps eliminate awkward pauses.
- Use likes/concerns/suggestions technique when someone attacks another person's idea.
- Ask participants how they would solve a specific issue.
- Use slides with photos and graphics, not just text (best practice without Zoom too).

# Opening the Meeting

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- Have something fun on screen as people are joining the call can serve as a conversation starter.
- Speaker arrives early and greets participants as they arrive.
- Allow for a couple minutes of casual conversation and interaction at the beginning of meetings to establish rapport (useful even among those who know each other - reestablishing "virtual rapport" really helps to set up a productive video discussion to follow).
- We've started programs with WebEx bingo.
- Open with a question to get participants talking.
- Use a True/False warm up question (participants answer in chat box).
- Have an icebreaker / fun intro.
- Prepare an off-the-wall question, like *"What's your favorite Netflix show OTHER THAN Tiger King?"*
- Include housekeeping notes slide at the beginning at the PPT, explains how to submit questions, where to find CLE forms, etc.
- Remind presenters and attendees that tech glitches happen and to give grace.

# Engagement and Interactive Exercises

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- Remote training gets more participation than live programs.
- We had people change their name in Zoom to be their favorite quarantine TV show.
- Have the speaker/trainer ask direct questions (not open-ended) and ask everyone to type in via chat.
- If you are calling on someone, say their name before asking the questions.
- Give time to contemplate, then ask to share.
- Do more breakouts.
- Zoom cocktail party: <https://medium.com/swlh/how-to-run-a-zoom-cocktail-party-and-have-better-classes-conferences-and-meetings-too-dc2c5b58f8be>.
- Tell a joke or share a recipe. Perhaps even more than once.
- Integrate masterclasses on baking, cooking, fitness, wine pairing, baton twirling, etc.
- Teach Zoom tips in the session, e.g., changing your Zoom name.
- Use interactive features of Zoom & outside sources (polling, whiteboards, screen share).

# Engagement and Interactive Exercises (cont)

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- Generally, include as many interactive breaks as possible.
- Use breakout rooms on Zoom for small group discussion.
- Make people co-hosts so they can go between breakout rooms.
- Utilize the Q&A feature in Zoom.
- Utilize the polling feature.
- Using chat AND asking a direct question ("*Which of these do you prefer and why?*") is more effective than asking open-ended questions.
- Integrate discussion topics during the lecture.
- Assign takeaways.
- Head-Heart-Gut Coaching Model for reflection and take-aways from session.
- Ask "*How does this apply to ... ?*"
- Asking for one word answers (or opinions that really can't be wrong) in the chat box is a fast easy hit – something like "*Tell us one word that comes to mind when you think of X...*" or "*Name one thing you could do to deal with this problem.*" Then you can tease out the thoughts from the one word contributions.
- Use hypotheticals for mentor/mentees - good for 1:1 relationship building.
- Include short video segments.
- Convert in-person trainings (including DiSC) and activities simulations like deposition training or mock trials to the virtual setting.

# Biggest Challenges

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- Learning about running the technology for remote coaching and professional development.
- Complementing live webcasts with just-in-time trainings.
- Asking presenters to get out of their comfort zone by doing something other than lecturing, i.e. create poll discussion, ask questions of the group.
- Synchronizing multiple speakers.
- Getting people engaged and talking without using breakout rooms.
- How to get more participation in a large group.
- Getting attorneys to buy in and be willing to learn about remote tools.
- Taking more sessions online instead of waiting until “normal” again.
- Remote social events for summer associates.
- People talking over others.
- Negative Nancy - how to manage?
- Getting people to show their faces.
- How to call on people. Cold calling may not be well received.
- Make sure summer associates aren't expected to be on Zoom 8 hours a day; need to find a reasonable limit and expectation to avoid Zoom fatigue.

# **We invite you to contribute to this collaborative resource ...**

If you have anything to add to this document, or if you are interested in conducting a virtual planning session at your firm, please reach out to David Freeman at [dfreeman@davidfreemanconsulting.com](mailto:dfreeman@davidfreemanconsulting.com).