

ONLINE FACILITATION BEST PRACTICES AND RELATIONSHIP BUILDING

TOP 10 TIPS FOR ONLINE FACILITATION

- 01 Spend the first two minutes of a call discussing the call agenda and objectives so participants know why they are there.
- 02 Do a quick roll call at the beginning of the call, including participant names, organizations, and roles.
- 03 Review mute/unmute protocols at the beginning of a call. If possible, use software that allows participants to “raise hands” as you control the mute/unmute to avoid participants talking over each other.
- 04 Ask participants to state their name before speaking.
- 05 Keep everyone engaged by calling on all participants. Avoid individuals monopolizing conversation by thanking them for their comments, and asking others what they think.
- 06 Do not spend time on group calls catching individuals up. Schedule separate calls or use email to ensure participants are up to date on all information and action items.
- 07 Practice active listening and identify interests. Ask clarifying questions if ideas or comments are unclear.
- 08 Keep time. Remind participants how much time a particular topic is allotted on the agenda, and check the temperature of whether to allow more time for discussion. Do a status check 5 minutes before the end of the meeting.
- 09 Follow up with individuals separately on a given topic or action items that need further discussion.
- 10 Keep track of next steps as the call goes on, and review “next steps” at the end of your call.

ADDITIONAL RESOURCES

[27 Unwritten Rules of Conference Calls](#)

[Conference Call Etiquette](#)

[Virtual Team Building](#)

[9 Tips for an Engaging Online Meeting](#)

WAYS TO BUILD RELATIONSHIPS AND MAINTAIN MORALE VIRTUALLY

SMALL BREAKOUT ROOMS are available on platforms such as Zoom. You can break your team up into small teams for small group discussion, and bring them back to the conversation for a report-out.

Use the **GOOGLE DOC COLLABORATION FEATURE** OR **ZOOM ANNOTATION OR WHITEBOARD FEATURE** to allow for team note-taking, idea generation, and idea voting.

BREAK THE ICE by starting a meeting with a virtual ice breaker: a fun survey question, virtual tour of participants’ room, discussion of participants’ favorite objects in their office, or stream professional development talks (think Ted Talks).

Sometimes email can feel too formal. **UTILIZE A CHAT TOOL**, such as Microsoft Teams or Slack as an informal way to engage with your team, send messages, and funny GIFs.