

Virtual Meeting Excellerator



How to Use Visuals to Get Engagement, Ideas and Action that Drive Results

"I loved the visuals that supported our discussions. Overall, I was more able to stay engaged with the work than I am in an onsite meeting."

– Meeting participant (via survey)



Meetings have always been important... and challenging. Now they're even more so. Change has made the stakes even higher, while moving everything online has made management more difficult.

Simply gathering people for virtual discussions isn't enough for them to do their best thinking. People who are feeling stressed can find it difficult to focus. They have to work harder to follow the meeting on-screen, so they get tired more easily. Complaints of "Zoom fatigue" are becoming widespread and can hurt morale.

Leading online is even more challenging. How do you read the room when there's little or no body language to see? How do you keep participants engaged when email, websites, games and apps seem to make multitasking irresistible? **You need to do some things differently.**

According to meeting expert Dr. Steven Rogelberg, **only 20% of leaders receive training on running meetings, and much of that training isn't meaningful.**

Online meeting training focuses on technology, not impact. Plus, as a leader, you've got a lot of other things going on! No wonder **running top-notch virtual meetings can feel tough** sometimes.

Hi, I'm Caryn Ginsberg. I wasn't always a trained facilitator either. My background is in strategy consulting. That work often included leading senior team meetings to assess position, define strategies and set goals and priorities. I've worked extensively in-person, but also remotely for many years (back when that meant phone calls and PowerPoint slides.)

I've used graphs, diagrams, templates and other visuals throughout my career. In 2014 I moved into graphic facilitation, integrating even more visual work.



WORK
PRODUCTIVELY



Online

SEE
DIFFERENTLY



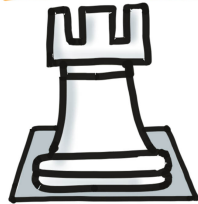
Visuals

THINK
CREATIVELY



Facilitation

MOVE
CONFIDENTLY



Strategy

Visual approaches are more fun, but more importantly, they're more productive. How many people on your team would say they're visual learners? Probably a lot!

Visuals are even more useful in the "flat" world of online meetings. My clients are getting **better results using these methods... from one-hour strategy workshops to 1½ day planning meetings.**

This guide shares tips tools and techniques I use to make online sessions more effective and enjoyable. They're based on my four-point *Vision ExcelleratorSM* approach. You can **work productively, see differently, think creatively, move confidently and have fun, too.** You can implement most of these tools quickly and easily. Use them to **get more out of your virtual meetings and advance your important work.**

"Capturing our thoughts visually brought a new dimension to our board retreat and allowed us to gain added depth, especially during our idea generation."

- Sharie Lesniak, Member, Board of Directors, Faunalytics



HOW TO USE THIS GUIDE

The approaches in this guide are ideal for decision-making teams of up to 10-12 people. Many of the techniques apply to bigger groups where you're trying to get input.

Think about the meeting(s) that would be most valuable to enhance. Examples could include:

- Senior leadership team – organization-wide or for divisions or departments
- Strategy – organizational; campaigns, programs, services or products; specific issues
- Board of Directors – retreats, special issues, ongoing
- Members or coalition participants – working groups, events

Keep in mind a couple of meetings where you'd like to introduce some changes. I recommend starting with something 90 minutes or less as a test case, if possible.

There are three ways to use this guide to move forward.

1. Quick wins

Scan the table of contents on page seven and then the full guide. Do you see potential for some of the tools to deliver immediate results for your meetings? (Look for tips with the quick win trophy symbol.) Read about one or two that seem most promising and try them first.





HOW TO USE THIS GUIDE

2. Deeper understanding

Read the guide thoroughly and choose a couple of tools to test. Consider having your team read it or ask individuals to focus on specific tools. Then you can work together to identify when and how to put some of the ideas to work.



3. Needs-based

See where you stand by having your team complete the assessment on page nine. (Since leaders often rate their meetings more positively than other participants do, it's important to get input rather than just rating the questions yourself.) Discuss the results and how you might use some of the tools to address weaker areas.



The *Next Steps* section on page 24 will reinforce some of these points and expand on how to take action.

As you review the guide, think about how I've used visuals here. Do they make the information clearer? More inspiring? More fun? That's exactly what visual approaches can do for your meetings.

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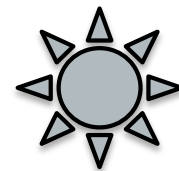
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Easiest to implement for quick wins

"I think this guide is good in getting people to think outside of the box."
- Anonymous feedback in guide survey



Work Productively Online

ASSESSMENT

So how good (or bad) are your meetings? **Clarifying where you are can help you decide where you want to go and how to get there. It also gives you a baseline you can use to assess your progress.**

Use the assessment on the next page to see what's working and what could be better in your online meetings. You can discuss the questions informally with your team or conduct a survey.

Even in the best organizations, people don't like to be critical publicly. An independent, confidential review can surface issues that might otherwise remain hidden. That's why I offer a complimentary survey and analysis to organizations with a senior team, board of directors, coalition or other leadership group of 7 to 12 people. (You can also include other participants for a total of up to 30 participants).



Please contact me at caryn@priorityvisions.com if you would like to discuss my running this survey for you.

MEETING ASSESSMENT

Think about online meetings you have attended in the past three months. Please indicate whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree or strongly disagree with each statement.

		Strongly Agree	Somewhat Agree	Neither Agree nor Disagree	Somewhat Disagree	Strongly Disagree
1.	Our meetings are productive.					
2.	I enjoy our meetings.					
3.	My time is used well.					
4.	I am clear on our purpose for each item.					
5.	I learn valuable new information.					
6.	We consider different perspectives.					
7.	I have enough chance to share my thoughts.					
8.	Our meetings generate new ideas.					
9.	I feel confident in the decisions we make.					
10.	Our meetings lead to action.					



Work Productively Online

SUCCESS MAP

Stephen Covey's quote, "Begin with the end in mind," applies to all meetings, but especially online. **Work backwards from desired outcomes** when planning your meeting to create a **success map for a meeting that gets you where you want to go.**

(Readers with nonprofits may recognize the success map as adapted from logic models used to define and enhance programs, which is where I first used this approach.)

1. What results do you want? - Outcomes

Are you looking for new ideas, opinions, priorities, actions or something else? Will decisions be made during the meeting or later?

2. For each outcome, what does that look like? - Outputs

What format do you need to produce for each outcome? Do you want a list, a ranking, a plan or a vote? Think about what you will need to document the outcomes, refer back to them and share with others.





SUCCESS MAP

3. How would you run your session in-person? - Activities

How would you use discussion, breakouts or individual work? What about flip charts or other visuals?

4. How can you work online to achieve all this? - Online

Now you're ready to explore technology options to make this happen!

I use columns in Excel for outcomes, outputs, activities and online, so I can see if I've got everything covered. You may prefer Word, handwritten or other styles.

Outcome	Output	Activities	Online
Outcome 1	Outputs Needed	Activities to Achieve	Online Tools

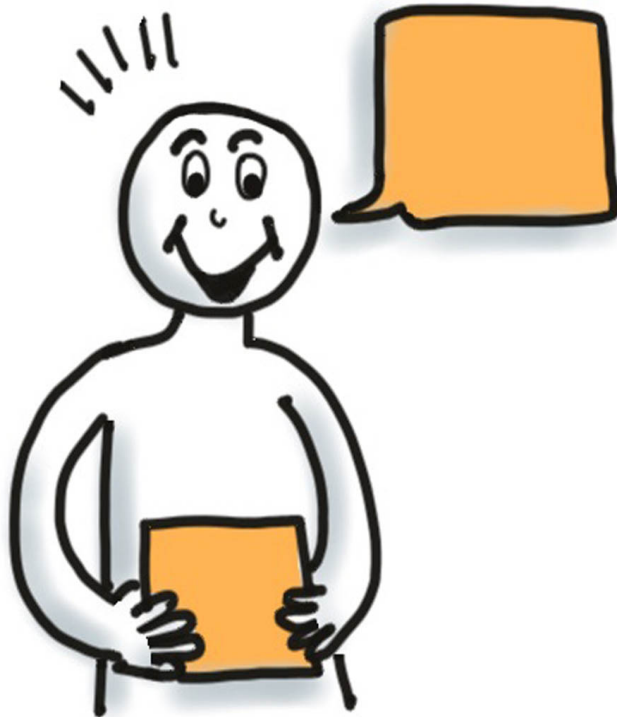


See Differently with Visuals

SHOW & TELL



QUICK WIN!
Very Easy to
Implement



Having people share images to communicate ideas, like the show & tell we did as kids, **engages meeting participants, supports better understanding and promotes creative thinking.** Though this activity may bring back memories of your youth, there's nothing childish about it.

You can alert people in advance to bring an image that represents their response to a question. For example, in an online strategic planning meeting I co-led for Faunalytics, a market research nonprofit focused on animal protection issues, we asked staff and board members to bring an image that represented why they were part of the organization. The visuals and discussion grounded everyone in the mission and provided an inspiring start to the day.



See Differently with Visuals

SHOW & TELL



QUICK WIN!
Very Easy to
Implement

In another retreat, participants shared images reflecting how they intended to be their best selves for the session. This bird showed how one person wanted to be relaxed with any ups and downs, just as birds ride wind currents.

Participants can print or cut out images to hold up to their cameras, or they can share their screens. (Make sure anyone planning on screen sharing has tested how to do that before the meeting.) If everyone has hardcopy images, having them all share them again at the same time at the end and taking a screenshot is a great way to capture the experience.

You can also have participants look for images during the meeting. Thinking about which image to bring back can give people **new perspectives**. The time to reflect individually also provides a **much-needed change** from group work, **increasing energy**. If time is tight, you can share images you've chosen in advance and let participants choose which one best represents their response to a question.



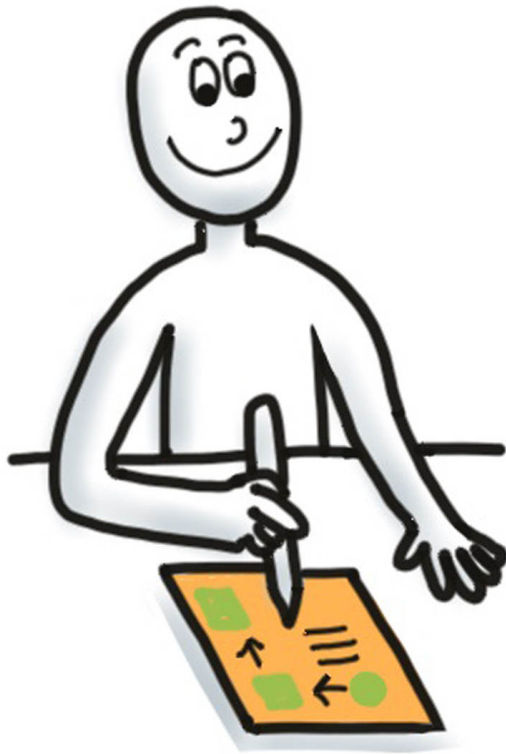


See Differently with Visuals

GRAPHIC RECORDING

“The white board and drawing was such a perfect way to keep our attention and on point with the material. I just loved it!”

– Jill Eckart, Managing Director of Nutrition, Physicians Committee



Images drawn live help **participants get engaged, see relationships between ideas, retain important points and enhance their thinking.** The graphic recording images **reinforce key takeaways** long after the gathering. They can create buzz on social media for public meetings, events and conferences.

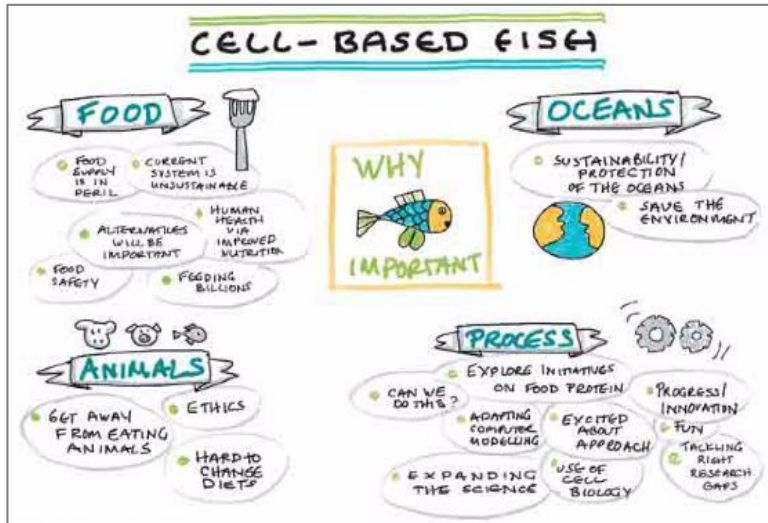
How to add graphic recording to your meetings:

1. **Set up a flip chart.** Capture highlights on a pad and easel in camera view, just as you would in person. While this isn't true graphic recording if you take text-only notes, it's still helpful to capture the conversation and vary the format.



See Differently with Visuals

GRAPHIC RECORDING



- 2. Work with a professional.** The digital image on the left is an [example](#) that I did during a webinar with scientists, media and other influentials about producing fish for food using cell-based technology.
- 3. Train your team.** Leading organizations use visual thinking to get better results not only in meetings but also in other group and individual work. No drawing ability required! I've trained groups from AARP, Johns Hopkins University and Stanford Graduate School of Business.
- 4. Invest in a staff member.** You may have someone on staff who would love to learn how to graphic record and be a resource for your organization. I'd be happy to talk with you or that staff member about books and training programs to get started.



Think Creatively with
Facilitation

BRAINSTORMING



QUICK WIN!
Very Easy to
Implement

Brainstorming to spark creativity and innovation is integral to many important meetings and to successful strategies. Here are a few ways to make your online brainstorming more productive:

- 1. Make the question visible.** Don't make people remember, especially if you're giving them more than one question at a time. Show the question in addition to saying it.
- 2. Include relevant visuals.** Photos, images, graphs or diagrams can engage participants and stimulate thinking. You might even distribute the question with visuals in advance to make sure people have everything handy and to suggest they prepare considering the question.





Think Creatively with
Facilitation

BRAINSTORMING



QUICK WIN!
Very Easy to
Implement

3. **Give everyone time to write.** It's tempting to jump in and hear from the first person who's ready. But others benefit from brainstorming on their own initially. That allows them to think without being influenced by leaders or other potentially dominant people. Encourage participants to write or even draw their ideas to surface more possibilities.
4. **Collect starting thoughts in writing.** Sometimes it can be helpful to get initial ideas by having people post them on the whiteboard, in a shared document or in the chat. That's especially true if one or more people tend to take a lot of air time. After that first brain dump, you might give people another round of individual time to build on what they've seen.

Depending how you capture the feedback, It can help to have co-facilitators, so one is leading discussion while the other tallies results.

Chat

Lisa: Which two of the potential priorities we've identified do you think are most important?

Shonda: Understanding the age 35-55 segment, developing related services

Malik: Related services, enhance social media

Ahmed: 35-55 segment, strengthening our brand

Jim: Strengthening brand, lowering cost



Think Creatively with
Facilitation

BREAKOUT GROUPS



I've been surprised to find a number of my clients haven't used breakout groups online. I'm not surprised they've been delighted when we've tried them together (which is why I've included them here even though they're not a visual technique).

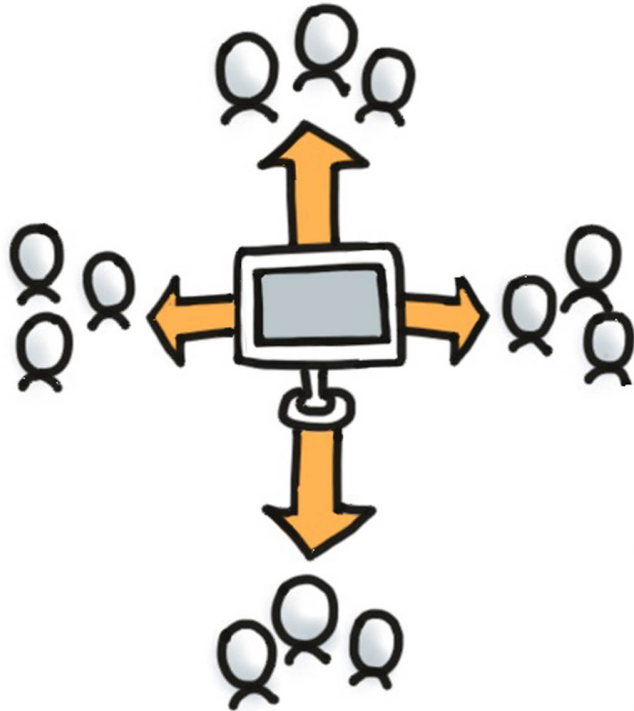
Breakout groups enable simultaneous processing of ideas, leveraging your meeting time. They enable participants to engage more closely with a smaller group, **strengthening relationships**. They also **encourage participation** from people who may be more hesitant to speak up in the full group. Together, these factors can produce **more and better ideas, decisions and actions**.

As a meeting host in Zoom, you can join a breakout group to observe or address questions, send messages to all groups (including time remaining) and close the groups when you're ready.



Think Creatively with
Facilitation

BREAKOUT GROUPS



Here are some tips to get started:

1. Review Zoom breakout instructions [here](#).
2. Zoom doesn't let you assign people to groups in advance. You can take the random groups it makes live, or you can move people. It's easy to rearrange, but it can take a few minutes for a bigger group. You might have participants consider a question while you adjust the groups, then launch the rooms.
3. If you are leading the meeting, consider having someone else be in charge of setting up the groups.
4. Test the breakout room function in advance. Use multiple devices or buddy up to have participants for multiple rooms.
5. Have conference call lines available. Consider distributing before the meeting.



Move Confidently
with Strategy

TEMPLATES

Sometimes a wide-open, freewheeling conversation is best to foster innovative ideas. Other times, a structured conversation makes sure that participants **address key considerations or options they might otherwise miss**. That's when templates can help **prompt focus and capture ideas**.

A template is a pre-made visual used to capture parts of a discussion. You can use them in many situations. Most of my work has been evaluating strategic issues and direction. I've used templates to help groups **assess competitive position** (yup, even for nonprofits), **evaluate strengths and weaknesses, set priorities, define goals and define action plans**.

	1	2	3	4	5
	Individual Outreach	Corporate Campaigns	Legislation	Brand	Budget
Organization 1	1	2	1	1	2
Organization 2	3	1	2	1	1
Organization 3	5	4	3	2	4

5 Significantly superior to our organization
4 Somewhat superior to our organization
3 About the same as our organization
2 Somewhat weaker than our organization
1 Significantly weaker than our organization

This template shows a generic **matrix for a nonprofit to identify what's distinctive** compared to similar groups. A business would use columns such as products or services, distribution, marketing and profitability.



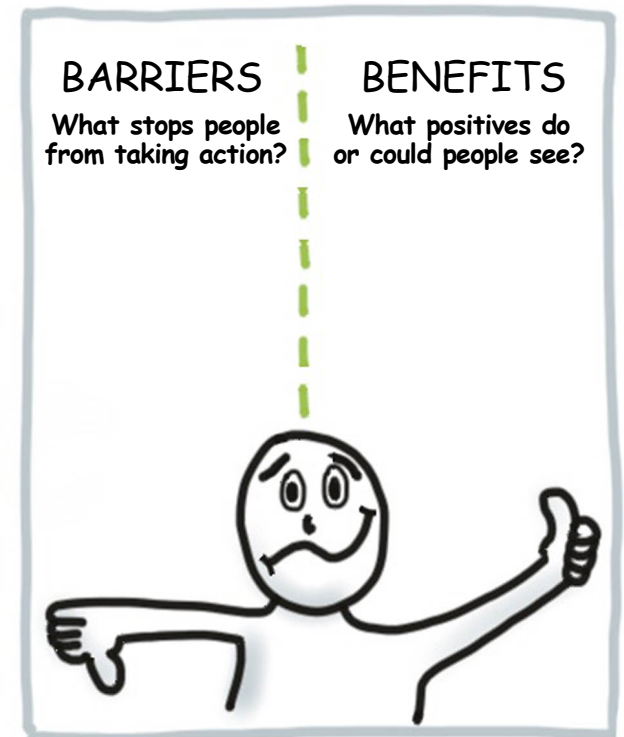
Move Confidently
with Strategy

TEMPLATES

I've included this **audience analysis template** in the bonus materials at the end. It's a **simple yet powerful** way to think about what barriers and benefits your audience sees to taking the action you're promoting.

For a nonprofit, examples could include people eating more plant-based foods, businesses reducing waste or elected officials voting for living wage legislation. Associations might look at similar external issues or at the barriers and benefits their members see in attending an online event or participating in a program. Businesses usually look at sales, but there can be other customer actions such as joining a loyalty program, signing up to receive text messages, etc.

You can create templates (with or without images), set them as backgrounds in PowerPoint and then type on them. You can use Excel, Word, Google Sheets, Google docs and other programs. If someone uses a tablet, they can annotate by hand or work in a drawing program.





Move Confidently
with Strategy

CONFIRMATION



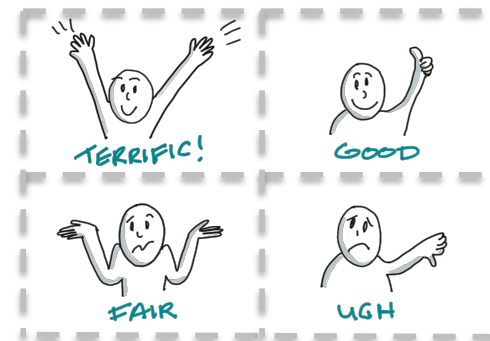
QUICK WIN!
Very Easy to
Implement



When you move from one agenda item to the next, is everyone on board? Visual methods offer quick, easy ways to **get a read and hear important perspectives that may not come out otherwise.**

The simplest approach is a thumbs up or thumbs down. I've provided **two multi-card options in the bonus materials** for nuance.

1. **Four impressions.** Use the cards labeled terrific-good-fair-ugh to see how people feel. Let those who report "fair" or "ugh" share brief thoughts. Consider their comments and the mix of responses to decide to move on or talk more.





Move Confidently
with Strategy

CONFIRMATION



QUICK WIN!
Very Easy to
Implement



FULLY SUPPORT



HAVE
RESERVATIONS,
BUT CAN SUPPORT



DO NOT SUPPORT

2. Three-level vote. I learned this approach when I was Director of Key Segment Strategy for the secondary mortgage agency Freddie Mac.

It differentiated enthusiasm from willingness to go along. We always listened to people who were opposed.

How do you use the results? You might agree that if a significant number are opposed or if not many people are fired up, you explore if there's a better solution before proceeding.

NEXT STEPS



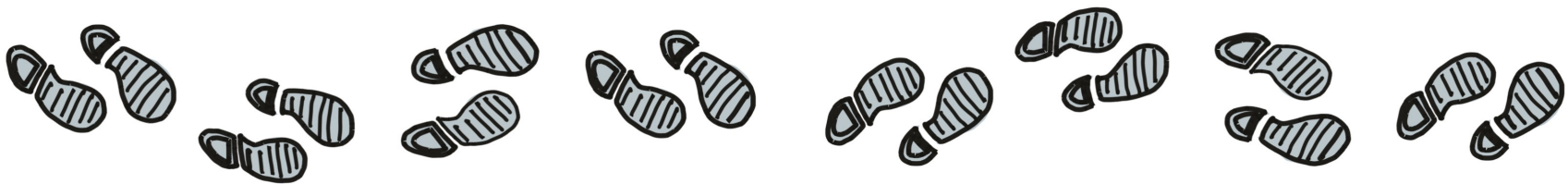
I hope you've enjoyed discovering fun, easy ways to engage your team and make your online meetings more effective. What's next?

The “**keep it simple**” principle applies! It's tempting to try a lot of new things at once. But doing so can overwhelm you and your team. Begin with just one or two changes, then add more as you see how it goes.

1. Remember to consider using the **assessment questions** at the outset to see where you are and prioritize what you want to improve.
2. Decide **which meeting** will be the first for you to try some new tools. Again, I recommend starting with something 90 minutes or less. Make sure it's far enough out that you have ample time to plan your approach and test any tech.

NEXT STEPS

3. **The most important tool is the success map.** Tightening up how you define your desired outcomes, outputs and activities will go a long way toward designing terrific meetings online or in person.
4. As you create the success map, ideas for visual **online tools can naturally emerge.** If not, choose a couple of tools and see where they can vary the format to increase energy and stimulate new thinking.
5. **Let people know you plan to do some things differently.** Encourage your team to have an open mind. Leave time on the agenda or in a brief follow-up survey to **get perspectives on what's working and what needs tweaking.**
6. **Update your meeting assessment from page nine periodically.** What's improving? What still needs focus?



IF YOU'D LIKE HELP

The tools in this guide can help you **improve thinking, generate new ideas, make the best decisions and get the results you need** from your online meetings. Of course, in such a short piece, I can't cover all the details about how to combine analytical, facilitation and visual processes to create the most powerful strategic sessions. If you'd like to draw on my experience, here's how:

Complimentary Support

I'd love to **implement an online meeting assessment for your team or consult with you for 20-30 minutes about an upcoming meeting**. Connect with me at caryn@priorityvisions.com to start the process.

Engagements

Want help **designing and delivering visual agendas and activities that engage your participants in different ways to stimulate their thinking**? Learn more about my work at <http://priorityvisions.com>, and contact me there or via email to discuss how I can enhance your meetings.



Virtual Meeting Excellerator



BONUS MATERIALS

- **Audience Analysis Template**

See page 21 for overview.

Use it to better understand the audience(s) you're targeting, so you can devise more effective strategies to overcome what's stopping them from taking the action you want them to take.

Email me at caryn@priorityvisions.com if you'd like a jpg file to use as a PowerPoint background.

- **Confirmation Cards (two styles)**

See page 22 for overview.

If team members don't have printers, you can mail copies in advance or have them draw/write their own.

DESIRED ACTION (WHAT):

TARGET AUDIENCE (WHO):

BARRIERS

What stops people from taking action?

BENEFITS

What positives do or could people see?



PLEASE PRINT AND CUT SO EACH DRAWING IS ITS OWN PAPER





**FULLY
SUPPORT**



**HAVE RESERVATIONS,
BUT CAN SUPPORT**

**PLEASE PRINT AND CUT SO
EACH DRAWING IS ITS OWN
PAPER**



**DO NOT
SUPPORT**