

VIRTUAL EXPERT INTERVIEWS

SUBJECT MATTER EXPERT NAME: Anne Sturdivant

INTERVIEWERS: Sunny Walker, Sheila LeGeros

Anne confirmed it's OK for us to share the notes with the team.

1. How do you elicit and sustain productive engagement (over a session)? Are you thinking of how to do ToP training virtually? Yes. My ideal situation is to have both people on the phone and on something like Webex. I have no clue if that's possible for you. That is like the Cadillac of virtual work. They are not very good from a facilitation point of view. That isn't because the tools are bad, it's because people don't know how to use them -- they don't know how to translate them into a facilitator world. Most of those Webex-like tools have white boards, question areas, polling areas. A few years ago I was doing a project with American Express with 25 people around the world who were local extensions of me (a change coach). We would have a 90 minute call with training. I would do an icebreaker with the whiteboard capacity of Webex. I asked participants to draw a picture of what kind of day they had or what kind of mood they were in right at the moment. It was incredible. This was a bunch of techy guys and they didn't think I was nuts. They were drawing pictures of their day right there on the white board. Then we proceeded to do things like a change project that impacted employees worldwide. They were to keep in touch with their supervisors worldwide. We brainstormed employee issues. I kept notes on the whiteboard and used it like a flip chart -- only I typed it. They were easily talking about what they were seeing. We turned it into an action plan and to do's and the whole thing. If you can manage it, it gives you the capability to really move into a virtual kind of situation with very few changes. Yes, you can't see their nonverbals. I've learned to start asking them, "what's going on in your face". "It's quiet right now, tell me what's happening." In the beginning I started sweating bullets, but I got so that I trusted when they would tell me when they had reactions that would be helpful for the group to know.
2. How do you design a virtual meeting? I'm trying to think if it's different. I did a webinar a year ago. We consciously did things to prompt as much interaction as possible. To do a typical design, and then translate it into technology. If you design it for virtual you'll have blinders on about what's possible. We pushed as much as possible to insert interactive stuff. I have also run work team meetings virtually. You know when you might do a small group thing -- I've had them actually do that at one site -- they come back to the larger group. The more you can do that the better.
3. Once you've done a design in your ordinary mode and you've adapted it to virtual, aside from interactive pieces are there any other things to think about? If you are constrained by just phone, then for sure. You can do a combination of PowerPoint with a participant booklet and be on the phone. It's a way to get around the expense of Webex. If you're on the phone only then that's one consideration -- the pre-work in terms of getting things out to people, and making sure they know what they're supposed to have out in front of them. I ran a check-in meeting for American Express for managers around the world. I was super diligent about watching time, being clear

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on the agenda, doing pre-work beforehand with people who had items on the agenda so they were clear about their timeframes. I had a tip sheet that I made up when American Express internals were going to be taking that phone calls over. Mostly good meeting management skills. It's super important to do it especially if you are just on the phone.

4. Is there anything in terms of timing or pacing that's different in virtual meetings vs. face to face? One of the things is that people will try to multi-task. In some cases you can't control that. In other cases I outline up front that if it doesn't demand their attention then something is wrong with what we're doing and they need to say so, and we need to pause and figure that out. When you're in a learning mode multi-tasking is not going to work. I don't think people can last more than 90 minutes in terms of an attention span. When people sit on the phone for 3 hours or a whole day, it's a total waste of people's time. It's about being aware of whether people are checked-in or out. You can't see when they're restless. You have to ask them. It has to be a ground rule that they tell you when their brain is worn out or they are getting distracted. The pacing is about keeping people's attention when there is limited sensory perception available. The pace is somewhat faster. I think you need to be more directive as a facilitative in some situations. I'm not the kind of in person facilitator who will say, "what do you think Susan?" because it's not my responsibility to pick on Susan. But, I might tend to do that, or use a round robin with a particular order in virtual settings. I am more apt when there is a decision point to do that.
5. What resources have you found most helpful? There is probably a lot more out there now. When I first started doing virtual facilitation at least 15 years ago. I just had to figure it out. There is probably a lot more out there than there was then. I haven't done Google searches. I used to do a seminar on virtual team leadership. I've read a lot of books. They are more general in approach. They don't carry as many practical suggestions as I would like.
6. How do you accommodate a variety of learning styles in your virtual facilitation? I would be tempted to help people find out their learning style and have them be responsible for getting what they need out of the session. As an opener you could introduce resources to help them figure out their learning style and talk about ways that virtual learning might be approached with their learning style so they themselves take responsibility for their own learning. I tend to use Myers Briggs. In my design I think about how to give think time for the introverts, and what's going on for the sensors who need concrete things to think about vs. floating in conceptual thought. I run the the design through as many modes of communication as I can, and through the Myers Briggs styles.
7. What criteria do you use in choosing tools for virtual facilitation? Generally, the flexibility to genuinely engage people to interact. I do not like what some people do with one-way communication. Who ever learns that way? To me, it's about the ability to engage people actively -- it's at the top of my list. Cost effectiveness is another one. How reliable it is is crucial. I do not want to spend 20 minutes at the beginning

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of a session helping people to get in. That's a mess. I teach at the University of St. Thomas. They have an online asynchronous system. That's OK for certain kinds of things, like post something for everyone to read and give your observations about it. By the way I use ORID a ton virtually and everywhere. Like when I'm dealing with the American Express group, I teach it to them and have them use it to. So when they see I am moving into ORID they know what I'm doing.

8. What else do we need to know about virtual facilitation? The struggle was and still can be maintaining my own confidence and my own centeredness and just being fully present virtually. It takes a lot of concentration and energy and a lot of trust in myself and a group. I mentioned the thing of sweating bullets sometimes. It's really important to establish the tone of the group early on so you don't have to worry about sweating bullets. You can say, "I'm feeling a little disconnected from you, so help me get connected." The psychological piece of being a virtual facilitator took and takes a lot of attention. I would be totally focused on what was going on. It took a lot of energy especially in the beginning. Maybe that's my nature. I've seen other people do it quite flippantly. I've found the need to be very, very present when facilitating virtually.
9. What do you find most critical in choosing tools for ToP Virtual Facilitation? (ToP only experts) I have taught other people ORID so much, and have attributed it to ICA. I do consensus workshop type work virtually. If you have Webex you can use the whiteboard for that. You can use the polling feature to facilitate that. You can do grouping and naming. You can take notes for them and ask them to tell you what to do and you do it in front of them. I don't remember if a mindmap is part of ToP. I have tried to do that too. It can get kind of bananas -- I've experimented with mindmap and other brainstorming kinds of modes. If it's not workable, sometimes I have them use a blank sheet of paper in front of them, and have them do their own flip chart individually for themselves so they can stay with the whole group and can be seeing what's emerging in front of them. I've done nominal group technique where you go round robin. I've had them keep track of the ideas as they go round robin and then try to generate a consensus after the round robin. Some of the facilitation tools we use are adaptable. You just have to think outside the box about what is possible.
10. Who are other experts we might want to contact? One of my colleagues at the U of St. Thomas -- her research is in the arena of virtual. Rama (Ruma) Hart. Her email is rkhart@stthomas.edu. She is on summer break and she still does her email. I would give her a little background on what ToP is and what you're trying to do. Ask her for resources or tips. A lot of what she deals with is the trust in virtual teams. In the situation that you're going to be in -- would you be teaching ToP over a period of time? Ask her for sources to help. And leave the door open to come back later as you know more.
11. What other critical documents, articles, books or resources should we read? When we did the workshop for virtual team leaders we put together what we hoped would be a book. At the time most publishers already had something or didn't know what

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we were talking about. I still have that. We took the stages of team development and we took situational leadership as an organizing principle. It's about 75 pages long and have no problem sharing it with you. See if there is anything helpful. If you do end up using some of it, then attribute it. You can integrate it into your own stuff. There is a Harvard Business Review article that I will look up and send to you. It's indirectly related to training virtually. It helped me with intact dispersed work teams. The research says that virtual teams can actually be more productive than face-to-face. That was a big turning point for me. All of our assumptions about face-to-face are couched in some myths about personal interaction. We're not talking about second best. In some cases it can be better. Some of why they turn out better is because they don't waste time chatting during staff meetings. They can talk instantly with each other and solve problems -- there are sites for product teams with a chat facility in this spot. It's like having their own combination of Webex and Twitter -- they're the only ones that can get into it.