

TTN Virtual Knowledge Team Expert Questions

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Interviewers Names: Ester Mae Cox and Penny McDaniel

Experts background or experience: Located in Oakville, Ontario Canada. Specializes in using web based tools to help clients in their work, quality professional who specializes in facilitation of strategic plans for boards and seniors teams, development of performance indicators, mediating board staff disputes and completing surveillance reports for clients. Certified ToP Facilitator, IAF CTF, American Society for Quality - Certified Quality Auditor and Certified Manager of Quality/ Organizational Effectiveness, and Certified Business Professional.

Please capture the highlights of your interview. Below are the questions identified by the knowledge team, feel free to adjust or go deeper depending on the expertise of your interviewee.

1. How do you elicit and sustain productive engagement?

All of my work is done through word of mouth and repeat business. I tend to sustain my clients over a two to three year period. The focus of my work is the most senior person in an organization along with the Board Chair. I maintain relationships with leadership in health related organizations on an ongoing basis. Currently, my best method of keeping in touch with key people is through my Blackberry. I tend to use PIN messages or short e-mail blasts to obtain work and support the relationships. The focus is understanding and anticipating the future work requirements of senior people in organization and then positioning the practice to respond to the needs.

2. How do you design a virtual meeting?

For me, a virtual meeting is just one tool in the ongoing work of a virtual team. A group working together on-line (Virtual Team) usually has a specific result they need to accomplish in a timely manner. The Virtual Team is pulled together to achieve the desired result. As a facilitator, my job is to make it possible for the team to accomplish the required results in a timely manner. Using open source and store bought software, I enable teams to work in a virtual framework. My work with teams include:

- a) Virtual meetings - conference call with web based technology to watch screens
- b) Survey Tools - Zoomerang
- c) Discussion Boards - used to track dialogue and activities inside projects
- d) Virtual Work Centres - Huddle, HyperOffice

3. What resources have you found most helpful?

Some of my favorite tools include:

Mindmanager by Mindjet - This is a power tool I use in 90% of my work for clustering, documenting and developing Facilitation Designs. I strongly recommend it for any ToP Facilitator (<http://www.mindjet.com>)

phpBBS Discussion Board - However, this application just took down my entire website so I would suggest not using this tool right now. (<http://www.phpbb.com>)

Feeddemon for Newsreader software - This is another power tool. It is windows based. However, I use for 90% of my intelligence work on the Internet. Easy to use yet powerful in developing indepth threads for materials. (<http://www.feeddemon.com>)

iGrafx for flow charting - A detailed flow charting program. I'm still learning and finding new and innovative ways to use this tool.

It is a Windows based tool that really helps me see the process related to the work of a senior team. (<http://www.igrafx.com>)

C4 Dreamweaver for Web design and editing php files - Not something I would recommend for ToP Facilitators. I use for my work on websites.

(<http://www.adobe.com>)

MySQL for data base back end work - This is a popular data base program used on the web. Some people would use Filemaker Pro or Access. I think it is important to have a good understanding Database structure as well as how to "normalize a table". Second Life - The emerging place on the Internet. It takes some getting use to. (<http://www.secondlife.com>)

The Bat! email client - I encourage people to try using at least three different e-mail clients to understand the real structure and design of e-mail. During our call, I'll share how insecure e-mail really is and how it should not be used for client files.

(<http://www.ritlabs.com>)

Groupmail by Infacta - One of the best bulk mailing programs I know of at this time. (<http://www.infacta.com>)

Copernic Software Search tool - Research tool I use for monitoring information on the net. I like because it tracks emerging information and sends to the client with me having to work at.

(<http://www.copernic.com>)

Evernote - An excellent program for keeping my notes on a daily basis. This response was drafted in Evernote (<http://www.EverNote.com>)

CMap Tools - This is a great program to use when working with groups on obstacles. It is free.

(<http://cmap.ihmc.us/conceptmap.html>)

Go to Meeting - This serves as the back bone for my online meetings with clients to help them see materials in advance. I also use it live during facilitation session to tie in people who are participating in the event. (<http://www.gotomeeting.com>)

Other:

Hyper Office is another virtual team space patterned on MS Outlook with some ability to mail other team members and store files some of these virtual spaces allow you to edit in the space, some don't. Some have tasking functions allowing you to go in and assign a task which notifies the other person and they can accept it or reject it.

Google Docs is a master information monster. Security is relative

Need some kind of webconferencing platform many have a download problem except GoToMeeting and a few others

4. How do you accommodate a variety of learning styles in your virtual facilitation?

I tend to see groups using a research model developed by Dr. T. Thomas of Austin Texas. The Thomas Concept allows me to better understand groups both face to face and on-line. You can learn more about the theory by visiting <http://www.oppositestrengths.com>. In a nutshell, I design around the eight patterns of core strengths. My experience has taught me that Riskers have a real challenge working through on-line sessions while Thinkers will work through the process.

Practical Thinkers need technology that works in short order while Theoretical Thinkers get frustrated or lost in the process. Finally, the Dependent riskers really would prefer to be in a face to face meeting and will continually state that throughout the meeting while the Independent riskers will be on-line long enough to get their assignment and then get off the meeting. We need to balance the thinkers and riskers.

As an example, The Riskers, Theoretical thinkers and Independent Riskers would be boarded to tears with a "focused conversation on-line". However, to keep them engaged, I would run a back channel to allow them to pick up an assignment and get off the virtual meeting in just under 15 minutes.

Understanding the core strengths of the individual is key to really building strong virtual teams and the use of on-line facilitation methodology.

5. What criteria do you use in choosing tools for virtual facilitation

I determine the virtual tools based on the needs of the client. Over the years I have found client needs and group capability are the best factors to determine the tool of choice for facilitation events. I use the ToP Design Process when building a design for a group. Once I have a design, I build a virtual design to support the rational and experiential aims of the group design.

6. What else do we need to know about virtual facilitation

Like music, I encourage a hands on approach to practice. There is simply no one tool or approach that will work. It is important to work hard at working with existing technology to support client needs.

I am big supporter of the following:

Learn as much as you can about how e-mail really works. You will be surprised about how insecure it really is. Learn how to identify factual information from false information. Email is not secure it can be intercepted, read and passed on to others when it may not be appropriate. Need to be careful where email comes from – you just don't know what's at the other end of the line and sometimes you are blocked and don't know it. You must create a discipline of not relying on email all of the time.

Set up a virtual space for project and run it. It's one of the best ways to learn about how group work in a virtual space.

Avoid using "face to face meetings" as the "standard" for doing virtual team work. It will be very frustrating transition. Instead, start with a blank page and focus on design with the client and the group. The focus on "building a virtual sticky wall", can lead one down the wrong road very quickly. Instead, focus on developing solid rational aims with a group. Then, the required technology will follow. You will be surprised about the wealth of tools that will do the job. (I am amazed at skill level of the average team member in using the Internet. I think people often over estimate what people can do with the Internet. Also, I find people often fail to take the time to work outside their comfort zone)

Have a mix of web based tools and machine based tools. This is helpful when you are working in a place with poor Internet connection

Practice using the tools everyone day. I have four key tools I use for most facilitations that include Mindjet, Go to Meeting, RSS and Evernote. I set aside about hour a day to practice in these areas. I'm currently expanding my list to add back in Crystal Reports and iGrafix

Remember the world of Windows. I enjoy working with my colleagues who love their Macs. However, there are lots of windows users out there in today's world. The client does not want to

hear about, "well on a Mac". It really makes them crazy. Stay focus on the application and the end result. I have found that really does make a difference in working with clients.

Read the literature on Virtual Team - To make a difference in working virtual facilitation, it is important to read the literature on virtual teams. The best way to sell the practice is to demonstrate that you are a strong virtual team. Give people a chance to see your "virtual team" in practice (eg., Host gotomeeting client design sessions instead of a face to face meeting, turn over design results in 60 minutes or less, use computers in live sessions with virtual writer and graphic team members. People need to see the virtual demonstrated before they will trust on-line sessions)

Security is relative. Huddle is pretty secure. Privacy is different depending on the country you're in. USA has the Patriot Act – problem is they can raid a server at any time and don't have to tell you about it.

Most websites including Facebook is a composition of many many fields of a database. When you want to create a database ther are 28 – Drupal, Mombo... many are open source

7. What do you find most critical in choosing tools for ToP Virtual Facilitation? (ToP Experts only)

The Design eye process is critical in determining which virtual tools to select. You can find additional information on the tool in the Huddle Website. Also, consult Wayne Nelson at ICA Associates for additional information

Keep a very open mind when exploring tools. Please remember there is no quick fix. Instead, start with the group first and then explore tools last. That process has worked well for me.

Complete no less than five facilitations before considering teaching this material to ToP facilitators. One needs to develop a real comfort with this before it can be taught to others.

Mindjet can cluster live time – no cards or markers allowed in the room – have to do it real time on screen. Clustering gets very powerful with that and with one click can Cluster to a Word doc or PPT, can convert action plan to a GANTT chart.

Seems to me there are places in our processes where we should push to asynchronous

8. Who are other experts we might want to contact?

I would encourage you to talk with Dr. Thomas to learn more about the Thomas Concept. It is a very power tool to use with groups and can make a significant difference when selecting tools for virtual work.

9. What other critical documents, articles, books or resources should we read?

Please read through the Baldrige Quality Award Standards as you continue your exploration of virtual facilitation.

Highlight key points that you believe are relevant to the ToP Virtual Team's Work: