REMOTELY
PRODUCTIVE

LEADING BETTER ONLINE MEETINGS AND WORKSHOPS

ALEX PUKINSKIS

Remotely Productive

Leading better online meetings and workshops

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For Jean

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Preface

Remembering Jean Tabaka

I wasn't always good at leading workshops.

In fact, in my first year at an international consultancy, a client rejected me for a project because they didn't think I had the skills to run workshops well.

I was a bit surprised (and indignant!). But the truth was, at that point in my career I'd never seen a great workshop.

That all changed when I joined Rally Software and started working with ace facilitator Jean Tabaka. My job included teaching the basics of agile methods to our customers, and Jean took me under her wing as she taught larger workshops.

Early on in our partnership, we flew across the country to teach a 2-day Scrum class. We shipped a projector to avoid an expensive rental from the hotel, but the package didn't make it on time. Jean decided we would just forget the slide deck and teach the whole class using flip chart paper on the walls. This was my first exposure to real visual facilitation.

In 2006, Jean published her book, *Collaboration Explained: Facilitation Skills for Software Project Leaders*. Over the next decade, this book taught thousands of tech leaders to lead collaboratively.

Jean then created an in-person facilitation class that took my skills to the next level. Over the course of two days, we learned by doing. We went deep into all the skills needed to lead and design workshops, using sticky notes, flipcharts, dot stickers, something called 'pass the pen', agenda-writing and more.

I wouldn't have the skills I have now if it weren't for that class. And everyone who took the class loved it—many said it changed their lives. It certainly changed mine.

When Jean died suddenly in 2016, she left behind a number of us who felt committed to carry on the work of teaching facilitation and collaboration across the tech industry. This book is dedicated to her.

It's fair to say that I learned over 80% of the classical facilitation material in this book from Jean. She deserves a ton of credit. Think of Jean as Socrates and me as a lesser Plato.

The dance between vulnerability and control

Jean's teaching spanned a range of themes around trust, courage, and safety. She felt we got the best results when people felt seen, heard and valued. In the mid 2000s this was still a novel idea. Brene Brown hadn't yet given her Ted Talk[1] or written Daring Greatly[2]. Jean was going out on a limb, talking about her own experiences, and being vulnerable for many of us to see.

This is important because collaboration and facilitation are a dance between vulnerability and control.

We can only collaborate when we give some control to others in order to see what happens. We allow ourselves to be vulnerable to new information. Without trust and vulnerability, we hold back our selves, our opinions, our knowledge, our feeling and our time.

Think about your online meetings. How much trust and vulnerability do you see? Are these things even possible in a Zoom call?

That's where you come in, and where this book can help.

Chapter 1: Welcome

How much of this week did you spend in online meetings, listening to the same old perspectives from the same people?

Did the conversation race from topic to topic without reaching decisions or actions?

Were the remote people silent while the people in the room dominated?

Did you watch as people began to multitask, their faces flashing different colors as they worked in email or Slack with your call minimized in the background?

Did you sense that the smart, quiet ones were staying quiet because they couldn't see a way to break in before time was up?

I've felt this way a lot in online meetings.

You'd think we'd be good at this by now

In the years since since the pandemic began, many of us have been in literally thousands of online meetings. Why aren't we great at this yet? It's true, we do know how to take turns speaking and sometimes hit the 'raise hand' button. But in most everyday meetings, we're not collaborating very well.

I think it's terrible that in some of the best-off places in the world, we are creating misery through our meetings. Smart, capable people are sitting through meaningless speeches because they don't see a way to break in.

We need new online facilitators

When we meet in a room to work through tough challenges, we can hire a professional facilitator to help. By creating structure for how we collaborate, a facilitator helps the group to get somewhere. The techniques for doing this have been around for years.

But in our online-first, digitally connected workplaces, many new knowledge workers don't get a chance to collaborate this way. It might be five or ten years before they join any kind of collaborative in-person workshop.

Plus, I've learned that a lot of the traditional facilitation techniques just don't work in Zoom. I can't just ask people to talk in pairs, or move my body to the middle of the room to block eye contact and stop a conflict.

The good news is that the principles of facilitation can be adapted to work online, with a new set of collaboration techniques designed for our digital tools. That's what this book is for.

If we are meeting online, our workplace is online, so we need a new generation of online facilitators who can shape the way we collaborate in every meeting. I hope you can be one of them.

Who this book is for

This book is for anyone who leads online meetings and wishes for better results.

It's especially meant for leaders, but if you're an individual contributor who wants to spark a change in your company, you can also use these tools.

Don't assume this book is just for **remote** teams. Many of us are in a **hybrid** world, with a few people in the office and a few dialing in. These techniques are meant for you too.

How this book is organized

The book is in 3 parts:

- Part I shows the first steps to **improving your everyday meetings**. We'll walk through scripts for two meetings—-the decision meeting and the weekly team meeting—and give you 19 techniques you can use right away in your next meeting.
- Part II gets you started on **designing online workshops**: how to shape the path the group will follow to reach outcomes. We'll introduce some of the theory around how groups come to agreement and give you the tools you need to create your own workshops.
- When you are ready to go from basic meetings to great workshops, Part III will give you **online facilitation skills**. We'll teach you how to handle your tech tools, to open and close well, to weave together live work with asynchronous work and handle hybrid online/offline meetings. We'll also give you some emergency procedures for when things go wrong.

If you're looking for some techniques you can use right away, Part I is for you. If you want to understand the theory before you begin, Parts II and III will explain how and why those scripts work.

Why 'Remotely Productive'

The pun in the book title might not be obvious if English is not your first language. Used this way, *remotely* means 'a little bit'. Barely above zero.

When we're trapped in a video call, watching executives or senior leaders switch topics at random every 2 minutes, colloquially we might say the meeting *isn't remotely productive.* Not even a little productive, in other words.

The title also reflects my personal struggle with online meetings. Most meetings can and should be improved. But I don't think online collaboration can ever be as easy or as powerful as meeting face-to-face. So with the title, I want to temper your expectations a little.

Who is Alex?

In my day job, I lead product teams. Right now I'm Head of Product supporting a dozen product managers who lead 100 people across 10+ countries. but I've also worked as a tech support rep, computer builder, fullstack developer, agile coach, consultant, and trainer. (I like to try lots of different things!)

I've facilitated hundreds of meetings and workshops since 2005, ranging from 5-person team meetings to strategy workshops with senior executives to planning meetings with over 500 people.

I started experimenting with online facilitation in 2012, when I was leading the portfolio of an R&D organization spanning 9 hours of time zones. Since 2020 I have been doing about 90% online facilitation.

Much of my work is with tech companies, but I've also helped business groups, nonprofit boards and many others come to agreement.

I've learned a lot about facilitation from books, articles and conference presentations. And even more comes from Jean Tabaka. I'll give credit when I can identify a clear source. But know that many of these online techniques are just adaptations of standard 'together' facilitation practices that have been shared through the years.

Note on specific tool names

We have 3 primary tools for our online meetings: document software, collaborative board software, and videoconferencing software.

I often mention Google Docs or Miro by name in this book as a shorthand for collaborative documents or collaborative boards, respectively. For Google Docs, you can substitute other equivalent tools, like the Microsoft suite, Notion or Confluence, as long as they allow everyone to see real-time updates. For Miro, you can substitute another board tool like Mural, Figjam, Metroretro or even Apple's Freeform.

Likewise, sometimes I will mention Zoom by name, but feel free to substitute Google Meet, Microsoft Teams, Webex, or the videoconferencing tool of your choice. Nowadays, most of them offer reactions and breakout rooms, so you can make any of them work.

There are slight variations in feature sets that you may prefer. Jean preferred the chisel-tip Charters® flipchart markers, but I prefer the round-tipped Sharpie® ones.

If participants already have a board tool or document tool that they're familiar with, I recommend going with that one. Using something the group already knows will save you 3-5 minutes at the start of a workshop compared to introducing something new.

Chapter 2: Why we can't escape remote meetings

Many of us are now so used to working remotely, we've designed our lives around it! But some companies are experimenting with return-to-office mandates. Is the age of remote work coming to an end?

Remembering the colocated days

I must admit to some nostalgia. I love working face-to-face with others. I love that feeling of being part of something bigger.

When I worked at ThoughtWorks, we'd get the whole team together in one room all day, every day—clients and consultants sitting side by side around a big table, negotiating what to build, and pair programming (literally sharing computers) to make it happen.

Then, I spent 9 years at Rally Software in close collaboration as we went from startup to IPO. Our teams sat together, and we even iterated on how to design the collaborative space for multiple teams. Even as we grew to 5 cities in the US and Finland we still kept our teams physically together so they could work in the same space.

We did this because colocation has one key benefit: what Alistair Cockburn calls *osmotic communication*. When a team sits together, they overhear things that help their work. If you get the space designed right, with walls in the right places, they're not overhearing noise from other teams at the same time.

For about fifteen years I got accustomed to this ensemble feeling. Mike Burrows, creator of the *Agendashift* method, describes the ideal in his *Agendashift True North* statement: "Right conversations, right people, best possible moment. Needs anticipated, met at just the right time."

It takes some real work to get the org design right to make this happen, and many companies don't succeed at creating that feeling. But it's definitely possible, and colocation makes it 10 times easier.

Colocation for workshops

It used to be routine to bring people together for workshops: to reflect and improve, to solve big problems, to plan what's next. At the time when I first learned to facilitate, the conventional wisdom was that for tough work, you want to come together in the same room. Remote participation was usually an afterthought; we accepted that it was worse, and we tried to make it bearable.

The world has changed

The above heading is a cliché, but there's no way around it. In 2020 both people and companies learned that:

- Remote work is easier than we thought
- Flexibility can be a huge benefit for employees, especially those with families
- The productivity penalty is not as clear as we expected
- **Most companies were not using their offices in a way that creates any leverage from collocation**

Distributed work, even in the office

I've come to accept that remote work is going to be a part of my days, even when I'm personally going into an office. Here's why:

Talent demands it. Writing in Berlin in 2024, it seems that teams who want to hire the best engineering talent simply have to be open to remote work. There are a set of skilled people who refuse to commute to an office daily.

They have a good argument, because **tech companies usually fail to build collocated teams**. It's one thing to come into the office if you have a team room designed for the 5 others you work with daily, with a door that closes and the right setup. This can be great for focus.

But most tech companies have a patchwork of people they've hired over the years in different cities. Building teams is a hard problem for engineering leaders. Usually it's about skills and who's available. Timezone might play in if there's an 8-hour difference, but location is often the last factor considered.

So going into the office means going to an **ill-fitting office environment**. I'm a product manager, so I have lot of meetings. If I have 6 hours of calls with people in other offices, it's hard to do this in the office. I can't book a room for 6 hours, and there are rarely private offices free for the whole day. It's better to spend the day at home at my desk or even the dining-room table.

The situation is worse for an engineer. Dropping into the office on Tuesday probably means sitting with a random mix of people, some of whom are starved for social contact. The chances of getting even an hour or two of productive flow drop to almost zero.

Even if companies begin to rethink the office and improve it, with plenty of private offices and permanent team rooms with doors that close, the **cat is out of the bag**. The convenience of occasional remote work is much too great. And the benefit of far-flung talent

means we're going to keep meeting online, even when many of us are sitting together physically.

Online by default

I own several 'facilitation kits' with sharpies, stickie notes, colored dots and Flipchart markers that have been sitting on my shelf for years. When I tried to use them last month, I realized that the stickies were so old they wouldn't stay stuck to the wall.

While I would love to lead more in-person workshops, I've come to realize this isn't realistic for everyday work for most companies. People are spread across many cities. Not only is the cost of travel high, people simply don't want to do it. Why spend 2 days traveling to an offsite if it might be possible to get similar results staying in your home city?

The climate crisis means we also have to consider the ethics of business travel. How justifiable is it to emit massive amounts of carbon just to get better slightly better business results?

So now my thinking has shifted. I almost always plan for online, unless everyone lives in the same city.

Meetings are where we create culture

Patrick Lencioni, author of the seminal book *Death by Meeting*, writes in his later book *The Advantage* [3]

> No action, activity, or process is more central to a healthy organization than the meeting.

When we meet badly, in unproductive meetings, we create a culture of mistrust. When our meetings are effective, when we have the

right ones, with the right people and focus, we create a healthy organization. Lencioni says that when meetings are effective, people look forward to them and enjoy them because they know they are making their lives better.

It's definitely worth checking out both of Lencioni's books, especially if you're a leader hoping to set up the right cadences of effective meetings for your organization. In Part I, I'll offer help with online versions of what Lencioni calls 'tactical' meetings, and in parts II and III we'll cover how to facilitate his 'strategic' and 'developmental' meetings online.

There are some small-company founders experimenting with 100% asynchronous work—that is, all communication is written in software tools, and they forbid meetings. I appreciate their innovative ideas because being productive in remote work does require getting a lot better at writing and setting up asynchronous flow. That said, most of us will still need to meet for many things.

Online meetings are harder

Complaints about meetings are not new, but something has changed in the last few years. A bad Zoom meeting feels 10 times more soul-crushing than sitting in a conference room. We'll dig into the reasons over the course of the book, but in short:

- Videoconferencing is an *impoverished* medium, compared to meeting in a room. When we sit together, we share orders of magnitude more information, and that subconscious communication is what allows us to go fast.
- Interruptions (the healthy kind) are much less frequent, and so everything goes more slowly.
- The social norms that enable us to work fast in person are missing online[4].

- Participants are less committed to stay present because distractions (exits) are just a click away.

More on this in Part III.

Facilitation is the key to better online meetings

What is facilitation, anyway? I like this definition from the International Association of Facilitators (IAF)[5]:

> Facilitators fill an impartial role in helping groups become more effective. They set aside their personal opinions and support a group in making its own choices. Facilitators act as process guides and create a balance between ensuring individual participation and producing meaningful results.

When people work with professional facilitators for the first time, they're often amazed by how collaboration can go. When Jean Tabaka led a session, everyone felt heard: the bold made space, the quiet spoke up and we all got to agreement.

It seemed like there was something magical about Jean as a facilitator. (And there was- she was an amazing person!). But she believed that anyone could learn to be a facilitator, and taught a series of simple skills.

When can facilitation help?

Facilitation can:

- help a group to make a decision
- keep regular team meetings effective
- form a team (chartering)
- help a group reflect on their work together and what they want to change (retrospectives)
- explore strategic options for a company
- build a roadmap
- make a plan for the year
- make a plan for the quarter
- surface obstacles and agree on action
- create or reboot a strategy
- define the (new) purpose for a team or organization
- gather ideas for change
- solve problems around tension, disagreement, or misalignment

5 reasons to learn online facilitation

Not sure it's worth the effort to learn online facilitation skills? Here's what you could gain if you do learn:

5. Waste less time

When you're able to design and facilitate online meetings well, your team wastes dramatically less time. You are able to divert prep work and presentations to happen asynchronously. Your meetings will get started more quickly and end on time. You make good use of the time spent by intentionally choosing the work that really needs to happen synchronously.

4. More consistent results

A good facilitator can bring groups to results more quickly. Instead of rambling around the topic and running out of time, you manage the clock to ensure that the quiet voices are heard, the loud voices don't dominate, and that there is still enough time for thinking and deciding. This means your meetings will be more productive.

3. More fun

A good facilitator can balance productivity and fun in meetings. Novice facilitators can end up in 2 traps: either their meetings are so serious that others feel a need to disrupt them to add some humanity, or their format is so goofy that people have a hard time taking them seriously.

Ideally, an online workshop is just fun enough. People feel productive and engaged and laugh a little, but they don't feel like the fun is forced. If you're doing it right, they'll look forward to your next meetings and workshops, show up on time, and be more engaged, which makes your job easier.

2. Better commitment

It's easy to run a meeting where a decision is made but nothing changes afterwards. A good facilitator gets the decision made in a way that everyone feels committed to the result. If you create space for all voices to be heard, and then explicitly check for formal commitment to the decision and plan, you'll watch the team move faster and with more confidence after the meeting is over.

1. Fewer meetings

The #1 reason to become a better online facilitator is to reduce the number of meetings you have.

I spend a lot of time sitting at my desk at home now. I even bought a fancy chair, laptop stand, and an exercise ball to make things ergonomic. But I still don't want to spend any more time in Zoom meetings than absolutely necessary. They're exhausting, and I would like to free up my time for other work.

When you are a better facilitator, your meetings produce results faster. Because there is better commitment to decisions, those decisions are more likely to stick. You will need fewer follow-ups to correct misunderstandings, which means you'll have time for the intentional calendar design, reducing the overall number of meetings your team needs to have.

<p align="center">*   *   *</p>

The challenge is - where to start? Should you design a 20-person workshop around your biggest challenge? That's too risky. I'd suggest you start with some of your everyday meetings.

Part I. Improving Meetings

Which of these problems happens in your online meetings?

- Aimless, wandering discussion with no plan?
- People jump from topic to topic so fast you can't follow?
- Some people talk so much that no one else can break in?
- Remote people feel left out?
- Smart people stay quiet?
- Active conflict between individuals?

In this section, we'll talk about why open discussion goes haywire when groups meet online. Then we'll talk about how to fix 2 kinds of everyday meetings for teams of knowledge workers:

1. A **simple decision meeting** where a group needs to agree on what to do
2. A **weekly team meeting** where a group has many possible topics to discuss

I've written some detailed, step-by-step scripts that you can use to get started. You can use these in meetings that you've booked, or you can offer your help in a meeting you participate in. It's up to you.

As we go through these two meetings together, you'll learn 19 different facilitation techniques and tricks. So if you're not feeling ready to try a whole meeting, you can test the waters with one or two techniques.

As you read, think about the meetings that are coming up in the next week or two for you. How are they getting stuck today? Which of these techniques could you try to make them better?

Chapter 3: Why online meetings are so much worse

I don't mind meeting with 2 or 3 people online. With a tiny group, it doesn't even feel like a meeting; it's just a couple of people talking about a topic.

But something changes when the group gets bigger. When there are 5-7 people, things slow down. Everything feels stilted. With a group of 10 or more, it can feel like we're all waiting for others to finish talking so we can get back on track.

In a hybrid situation, the group can have both experiences at once: the people in the room have a rapid, exciting conversation, and the remote participants can't break in at all.

The dynamics of open discussion

Imagine a healthy open discussion among people who have great collaboration skills and feel safe together. They take turns sharing perspectives. They listen actively. They respond to what they hear and adapt. They elevate the ideas of others and make a better solution together.

Most meetings are not like this.

People aren't perfect. Groups have uneven power dynamics. Some people are tired or grumpy. They arrive angry at each other. As some people share perspectives, others engage in different ways:

They might choose to debate openly, or might change the subject, or placate someone to restore calm. Or they might remain silent.

As the group gets bigger, you are much less likely to hear all perspectives.

In *Collaboration Explained*, Jean talked about the problems with open dialog in in-person workshops. She offered facilitation techniques to *guide* open dialog, and workshop design techniques to *reduce* time spent in open dialogue.

Before 2020, though, I didn't need these techniques in all of my everyday meetings. We could survive everyday meetings without relying on tons of formal facilitation. Now, any 10-person meeting without structure feels like a colossal waste of time. What happened?

I think two things have changed. One is that when we were in a room with people, we got some social benefit from being together. If we like our colleagues, I think there's some basic energy we can get from feeling like we are working together on something, even if it's not going well. It could be those pre-2020 meetings weren't all that great either; it's just that sometimes we were getting some social benefit even when they weren't effective.

The other change is that we have a ton of informal, implicit, and nearly subconscious skills that help us to work together in groups—eye contact, body language, and interruptions—that we can't use online. We'll discuss this in depth in Part III. For now, just know that online meetings with more than 3 people usually need a more formal, explicit structure to be productive.

Chapter 4: How to help in a bad meeting

I joined a rough online meeting recently. It had been scheduled at 6pm on a Friday, a terrible time to begin with. I had plans with the family that night and it had been a long week. The meeting ran late, didn't cover the agenda completely, and I had to duck out abruptly after it ran 10 minutes over time. This got me thinking: **how can I improve a meeting as a participant if I don't want to take over completely?**

Often I just suffer through it. Why does it feel so awkward to speak up? First, I want to be respectful and give the leader a chance, at least at first. Maybe they have a plan and haven't gotten started yet. Maybe we don't have a culture of great meetings and it feels unfair to call one person out—I don't want to embarrass anyone. Sometimes it feels like there might be a political cost to speaking up.

Why do online meetings go so wrong? In their book *The Remote Facilitator's Pocket Guide*, Kirsten Clacey and Jay-Allen Morris say that online meetings are hard because group norms are invisible in a remote space. When we meet in person, we naturally behave in certain ways that don't carry-over to an online meeting.

If it's my own team and my own meeting, I will often open with some suggested norms and get agreement. If I'm just a participant, there are usually no formal norms, so I need to find a way to gently suggest new norms as we go.

Gently introducing group norms

Without getting permission and without making anyone else feel too bad, I realized I could safely introduce some norms. For example:

- Clicking the 'raise hand' button before I speak
- Reminding the group in chat or out loud that someone else has raised their hand
- Noticing when people agree on an action and typing it into the chat: *Action: Susan will prioritize finishing the workflow before the FAQ*
- When someone else makes a recommendation, typing it into the chat: *Recommendation from Len: We postpone the audit discussion until next week*
- Noting decisions in the chat: *Decision: Audit discussion postponed until December*
- Noting digressions in the chat: *We're in a new topic, Buyer complaints. Should we add this to the agenda?*

All of these are gentle, neutral observations, and typing in the chat doesn't force someone to stop speaking. Using the chat establishes it as a valid extension of the meeting environment. I'm using some of the richer features of the tooling without taking over, and I'm giving others permission to do the same.

Speaking up

If I'm feeling a little more bold, I can speak up. If the meeting invitation has no purpose or agenda, I can generally interrupt safely in the first 3-5 minutes safely to say, *"I'm sorry, Evan, I'm not completely clear on the purpose of this meeting. Can someone remind me?"* either verbally or in the chat. Once someone says

the purpose out loud, type it in the chat: *Purpose - To approve the budget for post-launch marketing activities.*

Often the agenda isn't written down, but once I get the purpose I can ask for it: *"Thank you. And what questions do we need to answer to achieve that purpose?"* As the points are stated, type them into the chat, hitting SEND once there is agreement so there is a nice single block of text others can refer back to.

Sometimes the leader shows the purpose and agenda briefly via screenshare and then moves on to other content. When this happens, I can say in chat, *"I didn't catch the full agenda. Can someone share the link?"* Sometimes I am able to find the agenda somewhere on Confluence or in another doc but it's clear that not everyone has it. In this case I will share the link to the agenda in the chat, *"I found the agenda here: http://teams.atlassian.whatever/12A83515"*

> I hang a sticky on my monitor with some of my standard questions to remind me it's ok and even helpful to ask these things.

Meetings that go into rabbit holes

Often 1-2 people will go on a tangent much deeper than the meeting is meant to go. They are excited because they are making an important point that they want others to hear. Online workers are often starved for the simple, natural conversations we would have if we were not on Zoom all day, and this is a very human impulse. The problem is that if we do it all the time, it destroys our meetings. How can you instead redirect the group, but do it in a compassionate way?

Once you have a written purpose, you can use it as a tool, even as a participant. You can respond when the discussion goes off

track. You might type in chat, *"I think we might be off-track. Do we need to have this discussion before we can approve the budget for marketing?"*

This is really easy if the purpose is written down, and really hard if it's not. Why? When you're checking against text, it's a neutral observation. But if everything is informal and implicit, you may appear to be passing judgement on the people who are speaking, which can lead to hurt feelings.

Meetings that go over time - how to break in

If the meeting is wide-ranging and you're approaching the end of it, you can say, *"We have 10 minutes left. Susan, do we have enough time to cover everything or do we need to prioritize?"*

Ask the person who called the meeting, NOT the person who is talking.

You can do this in chat or verbally. If you do it verbally, don't wait for a pause in the conversation. It's ok to speak over the person talking, but the first words out of your mouth should be an apology for the interruption.

You might find yourself at the end of the scheduled time (i.e. 6:59) with someone still talking. You've got a few options here, depending on how you're feeling:

1. Unmute and speak over them. Because of the timing, this isn't as rude as it feels. *"Roberto, sorry to interrupt. We've reached the end of our time."* You can then stop. You don't have to solve the problem. You can see if someone else solves it.
2. If you're feeling bolder, you can redirect to the person who convened the meeting. *"Roberto, sorry to interrupt. We've*

reached the end of our time. Susan, how can we carry this conversation forward?". When you shift the power back to the meeting convener, they are usually happy to have a chance to break in.

3. You can also leave quietly via the chat. "I have to leave for a prior commitment. Thank you for the [conversation/presentation/discussion/ideas]".

Meeting Tourism

It can be lonely working at home. Even as an introvert I miss being around people at work. Sometimes, at the end of the day, I have tasks to do, and I've also got an unimportant meeting invite in my calendar. I'm tired, and the tasks aren't appealing. So I join the meeting, just in case I am needed. It's a way to overhear some things that might be relevant, but the stakes aren't too high. I can use the time to recharge a little bit, to have side conversations with other colleagues who are not really engaged. It doesn't seem super harmful to do this if I stay quiet. But if half the people in the meeting are there as tourists, the impact can be quite big. We're happy just to see some faces. We don't care so much about whether the meeting goes well.

What's the cure for this? Personally, I need to try to decline meetings where I'm not really needed, and to get up and go outside for a walk instead. Or a spontaneous phone call with someone who's not in a meeting can be a better way to close out a long remote day.

You do not have to use all these techniques in every meeting. But try using one or two in each meeting every day, and you're gradually spreading the seeds of a better meeting culture.

Chapter 5: The Decision Meeting

Context

A group needs to make a decision but they tend to talk in circles and run out of time.

Ever find yourself invited to a meeting only to arrive and realize there's no plan beyond a discussion? This is a great chance to develop your facilitation skills in a low-risk context.

Script

You can add structure to a meeting simply by taking notes.

You start this process by asking:

> *Is it ok if I take notes for the group?*

Nobody will ever object to this.

Start a document in your favorite realtime editor. This could be Google Docs, Notion, or Word 365; it doesn't matter which tool as long as others can edit together in realtime. Add four headings:

- **Data**—the objective facts about the situation that nobody can argue with
- **Diagnosis**—ideas and opinions about what the problem might be

- **Direction**—-the suggestions for what we might try
- **Do Next**—-the concrete action items we've agreed to do
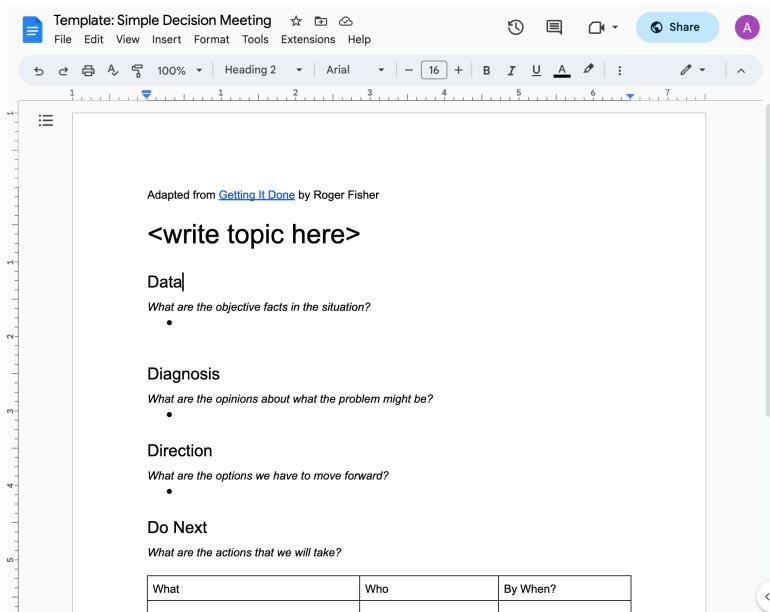

Figure 1. Screenshot of the simple decision Google Doc template, linked below

Click for template[6]

Then share the link in the meeting chat or Slack so others can follow along. You might want to also share your screen in the meeting.

Briefly introduce the 4 categories:

> *I'm going to try to write down everything people say.*
>
> *I have a section for Data, which are the facts nobody can argue with.*
>
> *Then we have Diagnosis, which is for all of our opinions about what the problem might be.*
>
> *Then I have an area for Direction, which are the options for for what we might try.*
>
> *And at the end, I'll capture Action items in the Do Next section."*

When you do this, you are redirecting the group away from just sharing their own perspectives and towards building a shared view of the problem. Simply adding a structure will help some participants to relax a little bit, and focus less on speaking their minds right away.

Now, start actively listening to what people are saying and try to write down their words in bullet points under each heading. Some people will try to work in order, data first. Others will jump to Direction or actions. That's normal, don't worry about it; just write it all down. People will see you scrolling in the document. If you are having trouble keeping up, or understanding the point, you can ask someone, "Can you give me the bullet point version to write down?"

If it feels intimidating to categorize what people are saying, ask them to help. *"Is this data, or a diagnosis?"* Usually they'll help you out.

I originally learned this technique from Roger Fisher & Alan Sharp's classic book Getting It Done: How to Lead When You're Not in Charge[7]. They used a whiteboard to take notes but I've adapted the technique here to work online.

Gently making space

At this point, a few people have been speaking, but you haven't heard from the whole group. You can make space for the quiet people by asking, *What other data have we missed?*, or *What other diagnoses should we consider?*

Perhaps a few people are gathered in the same room, and they're dominating the conversation. If you're still only hearing from the talkative ones, you can say,

> *I just want to check in with Rosie and Sam, since we haven't heard much from them yet.*

You can use the 'raise hand' feature in your meeting software to help break in on their behalf.

Moving forward

Once you have gathered 5-10 bullets for one of the sections, you can ask the group, "*Are there any other data points we need to add?*" to close off discussion on that topic. Then ask, "*What diagnoses do we have? What could the problem be?*"

When you're done gathering opinions, ask, "*What directions should we consider?*"

Selecting a path

Eventually you will have accumulated 2-3 options. It is worth asking, "*What other options are we missing?*". Then take a long, 7 second pause. You might find a talkative person declares on behalf of the group, "Those are really the only options we have." This is a good moment to call out the name of one of the quieter (or remote) people and ask, "*Rosie, what do you see that we're missing?*"

When you're pretty sure no more options are forthcoming, you can then work out how the group will decide. It's fair to ask the group, "*Is this a consensus decision, or are we just gathering advice so one of us can choose?*" Sometimes there is an obvious owner who can take the input and make a choice. If the owner isn't obvious, a vote can narrow the choices.

The fastest way to vote is using initials. Share the link to the document in the chat again, and stop sharing your screen so people have to open it for themselves:

> *Let's see if we can agree simply on the best direction. Here's a link to the doc. I'd like you to select your top 2 options by putting your initials next to them.*
>
> [demonstrate this with some fake initials that you delete later]

The document will look something like this:

Direction

What are the options we have to move forward?
- Launch Android version MR
- Run onboarding experiments DW BP   AG FW
- Paid advertising BW DR MR
- Influencer marketing with discount offer DR
- Referral program DW
-
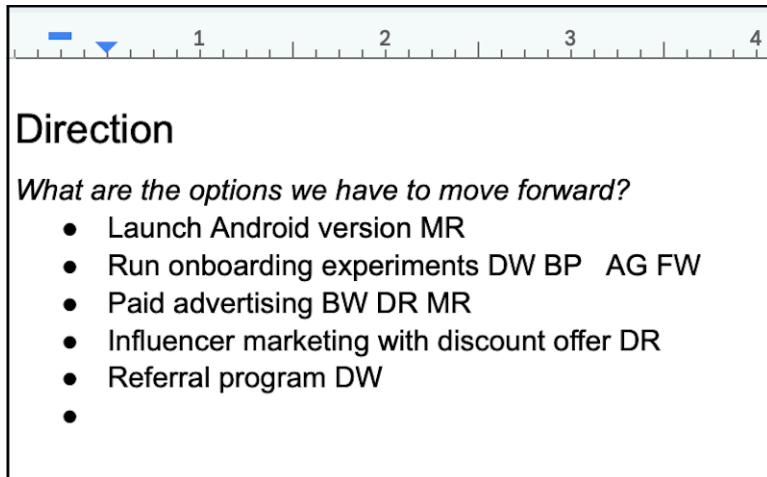
After a minute, one or two choices will usually be the clear favorite. Then it's time to bring the group to action:

> *What are the very next steps that we need to take to put these into action?*
>
> [7 second pause, and then write down the first response along with the name of the person who suggested the action]
>
> *Thanks, Rosie. When will this happen?*
>
> [if they hesitate] *'tomorrow, Friday, or next week?*
>
> [write the calendar date]
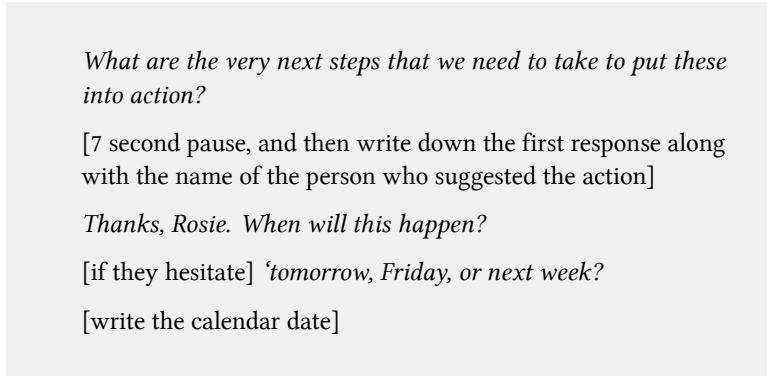
You may have noted some actions earlier in the discussion. Now, see if they are still relevant:

> *We also talked about a lunch talk on LinkedIn marketing—does someone still plan to carry that forward?*

If nobody signs up, either strike through it or delete it from the list.

Finally, you might want to ask the group, "*When will we follow up next?*" Note who will book the next discussion in the action plan.

What you've just learned

You now have a simple approach for gently guiding a decision meeting. Embedded in this script are 11 different facilitation techniques:

1. Offering the group a simple framework they can use to decide together
2. Making sure everyone feels heard through note taking
3. Co-creating a shared reference
4. Separating analysis, ideation, decision, and action
5. Steering the discussion with Tactical Screen Sharing
6. Increasing perspective by making space for the quiet people to speak
7. Opening/closing dialogue using "What else?" and "Anything else?" language
8. Agreeing on the decision-making mode
9. Dot voting to prioritize options
10. Asking people to commit to actions (or to discard them)
11. Setting a check-in to make sure action happens

In the next chapter, we'll talk about each technique in depth and explain why it works.

Chapter 6: Facilitation Toolbox 1

In my spare time I like to make furniture. When I started out, I didn't really know what tools I needed. I made a guess about what to buy for each project, gave it a shot, and learned about whether it worked or not. Some of the early tools I kept, some I upgraded, and some I sold.

Figure 2. My toolbox needs some hinges, and then we can fill it

Starting out with real facilitation is like that: you don't need all the best tools right now. You just need to get some of them and give them a try so you can begin to develop your own working mode. The advantage over saws and chisels is that facilitation tools are free.

These 11 starting techniques are not necessarily the most powerful ones. We don't want you to hurt yourself! You'll learn some really important principles in Parts II and III. These are just some safer things to start with that will help you have a positive impact on your meetings right away.

Now that you've seen the tools demonstrated inside the script, here's a bit more about why each one works:

1. Offering a framework

People are often happy to have a little structure in their conversation, especially if they know they tend to get stuck. Start by briefly outlining the approach to them in a minute or two, so that people know what you're planning to do. Once you've outlined the approach, ask, "*What **questions** do you have about this approach?*" to learn their worries before you start working. If there are a lot of concerns, you can ask: "*Are there any **objections** to moving forward with this approach for today?*" Even if people don't love this approach, they might give their consent to try it, and that consent is powerful.

If there are too many objections, you might choose not to facilitate. That's ok! Your offer might just have created space for someone else to step up.

2. Making everyone feel heard through note taking

As much as we try to be rational at work, we're all humans with emotions, and sometimes those emotions are intense. We're frustrated because we haven't been getting our way, because our ideas are ignored, or because the facts and data are being ignored. We might have slept badly or struggled with our kids in the morning. Every day we show up with some kind of emotional charge.

As a facilitator, you don't know how people are showing up (that is, unless you ask—we'll cover that in Part III). Jean used to talk about how people need to feel seen, heard, and valued. Simply writing down their words in a visible way can help them with this. Once they feel heard, they are often more open to considering new data and alternate views.

Sometimes people talk at great length and you lose the thread or can't keep up. Sometimes they talk in circles. If this happens, you can ask them to summarize verbally, or simply say, "I didn't catch all the details here - can you add a note to the doc?" and then move on by calling out the name of the next person who is trying to speak.

3. Co-creating a shared reference

In *The Remote Facilitator's Pocket Guide*, Clacey and Morris offer many insights from neuroscience explaining how our brains work in online meetings. When we start a shared document that everyone in the group can work with, we're doing what Clacey and Morris call 'co-creating a shared reference'. Writing down information in a place that people can trust enables participants to let go of those pieces of information so they can focus on the conversation.

4. Separating analysis, ideation, decision, and action

In the 'Simple Decision Meeting', we used the categories 'data, diagnosis, direction, do next' to slow down the discussion and help people listen to others. There are many different facilitation exercises that do the same thing. I sometimes use Observations, Reflections, Interpretations, Decisions (ORID) instead. You can also choose your own labels.

Why does this kind of categorization help?

- Sometimes one person's opinion is already quite set, and they're not ready to listen to new contrasting data. Making a separate space for the other data and observations allows

conflicting information to be considered. Teams hold contradictory perspectives—that's normal. We need to allow for that as part of coming to agreement.

- Sometimes feelings are very strong and they need to be discharged somewhere. Someone is frustrated at someone else, someone felt betrayed, someone felt left out. Having the 'diagnosis' or 'reflections' section allows those strong feelings to be verbalized and acknowledged. From there, they might be addressed, or maybe they're just left behind.

- Often there is an obvious solution to the problem that's wrong, and a less obvious but better solution that only emerges later. Having a place to collect these during the discussion (the 'Direction' / interpretations sections) allows us to keep track of possible solutions but defer deciding until everyone has spoken.

- Actions (or 'Do next') emerge randomly during discussions. Sometimes these are small things unrelated to the topic at hand. Other times they are incremental steps to gather data; other times they are the result of the whole discussion. Having a place to gather them keeps the discussion from getting bogged down at the wrong detail level. (Later we'll talk about a Parking Lot as a power move to manage distractions).

5. Tactical Screensharing

Depending on the meeting tool you're using, you can instantly change the dynamic through screensharing. At the moment you share your screen, the view changes for most people: from seeing a bunch of larger faces to a big document and a couple of tiny faces.

In ancient times, before the internet, there was a television network called MTV that spread pop culture memes, abeit much more slowly than today. The elders were deeply distressed by MTV's video editing—they found its rapid cuts and shifts in perspective

unnerving. But it was these changes that made it much more engaging for the youth than the static cameras our ancestors were used to.

When a video changes camera angles, it triggers what's called the "orienting response" in our brains. This response activates additional neural networks in the brain to try to figure out what's going on.[8]

Starting a screenshare has the same effect. It's an assertive tactic that can draw attention towards the shared problem space and away a speaker who is dominating. (If people aren't hearing each other, you can do the reverse, and **stop sharing** in order to draw attention back to the faces of others.)

Don't share your whole screen

Train yourself not to share your whole screen. It is distracting and makes the text too small to read. When people see your desktop, they start scanning your browser tabs, looking at your wallpaper and wondering what you're doing in Slack, and this distracts them from the discussion at hand. If your meeting tool allows it, share just a browser tab (without the menu bar). This creates a more polished environment for the participants.

We'll talk more about managing the visual experience in Part III.

6. Increasing perspective by making space for the quiet people to speak

Not everyone is equally assertive. In an unfacilitated meeting, more of the time is given to the assertive people, and this reduces the quality of the results. When an assertive person gets going, it can be really tough to stop them. In many cultures, it is considered rude or disrespectful to interrupt someone by speaking over them–and it

generally doesn't feel good. It's somehow even harder in an online meeting.

If you've got permission from the group to facilitate, remember that they *want* you to break in when this is happening. You can do this 3 ways:

1. Using the **raise hand feature** of your meeting software. Sometimes this is enough to catch their eye.
2. Literally **waving your arm** in front of the camera in a big gesture. It feels silly and rude in your own room, but it doesn't read as silly over video since your image is tiny. It can even be a relief to the person speaking to finally get some feedback.
3. **Unmute and speak over someone** If you haven't succeeded at breaking in otherwise, it's ok to interrupt. Remember, the group gave you permission to facilitate. They will thank you for it.

Acknowledge the person speaking and then name those who haven't spoken:

> *Thanks, Adam! We haven't heard from Jamie or Stu yet*
> *- maybe they have something to add?*

In chapter 11 of *Leadership is Language*, L. David Marquet writes that people with lower social status often see things that others miss, and they might be the only ones who are right. (That said, they also might also have nothing to add, so it's important to let them pass if they don't want to speak.)

7. Expanding or closing dialogue using "What else?" and "Anything else?" language

This is a subtle but powerful trick I learned from Jean. When we were gently making space, we asked '**What** other diagnoses should we consider?'. When we wanted to move forward, we said '**Any** other data points to add?'

> 💡 Open-ended prompting words like '**what** other' or '**what** else' encourage people to think of more items. In contrast, 'are there **any** more' or '**anything** else?' are closed, yes/no questions that invite people to think, 'no, nothing else' and move on.

You can use this trick to adjust the tempo of the conversation at any time. Usually, people won't even notice you're doing it.

8. Deciding how we will decide

It can be quite powerful to ask the group how they want to decide. In some more hierarchical business cultures there is still a deference to the leader to decide everything, but modern leaders know this isn't always the best choice.

There are three common choices:

- We decide together (consensus)
- We delegate to someone to decide now
- We delegate to someone to decide later.

Jean encouraged consensus-based decisions because she felt they were the most sustainable. And if your culture allows it, consensus can be fast. (We'll discuss this more in Part II.)

Sometimes the right call is for the owner of the topic area to decide. Other times, the team leader feels responsible for making the call. Formally granting them authority to decide at least acknowledges the voice of the group and can be a 'baby step' to more empowerment.

Jurgen Appelo has an activity called Delegation Poker[9], with cards you can buy or print. He suggests 7 kinds of decision-making:

1. Tell: I will tell them
2. Sell: I will try and sell it to them
3. Consult: I will consult and then decide
4. Agree: We will agree together
5. Advise: I will advise but they decide
6. Inquire: I will inquire after they decide
7. Delegate: I will fully delegate

We can use any of these modes in our meetings.

9. Dot voting to prioritize options

Often we have too many ideas or next steps: they're all good, and we don't know where to start. Dot voting is one of the most common techniques we use to bring a group to action. Participants can place several votes across an array of items. It's called 'dot voting' because when facilitating face-to-face you can use sticky

dots, and because that distinguishes it from the kind of regular voting where everyone gets only one choice.

We can do it to reduce a large list, but it also helps build understanding because people need to read the items before they can vote.

It also helps surface disagreement if the results don't show a clear winner.

We'll talk more about voting in Part II.

10. Checking for commitment to actions

People often agree to take on an action without really taking on an action - they say they will do something with the best of intentions, but forget to write it down and follow through.

I'm guilty of this myself! On an early consulting gig, I walked out of a meeting and was surprised when Rose Anton, the lead consultant, asked me, "So what did you just sign up for in that meeting?"

I had no idea what she was talking about.

She then pointed out the 3 soft commitments I had accidentally made to the client. They were now expecting me to follow through, but I hadn't even noticed.

We don't always have Rose with us to help us notice our commitments. As a facilitator, it's on you to help people recognize their commitments. You can't make sure they follow through, but you can increase the odds.

Listen for anything that sounds like an action during the meeting. You can silently make a note in the action plan, or you can call it out: "That sounds like an action. I'll put it in the action plan so we don't lose it."

Now you've made a commitment of your own to the group that you will remember to go to the action plan at the end of the meeting and process these potential actions. When you're processing an action plan, you have three questions:

1. Is the action item still relevant? Some ideas might have become less important as the meeting proceeded.
2. Is an individual willing to sign up to own the action item? (Sometimes nobody wants to, and it's better to drop it now.)
3. By when will they finish the action item? If the owner doesn't immediately have an answer, I usually offer three options: "Tomorrow, by Friday, or sometime next week?" Then I write down the relevant due date on the plan.

 Resist the temptation to **assign** the action item. If nobody offers their name, say, "Ok, then we're dropping this task for now," and move on to the next one.

11. Setting a check-in date to make sure action happens

Anything complex enough to justify a facilitated meeting probably needs follow-up. After we've finished adding actions, I like to ask, "When and where will we follow-up as a group to check progress and adjust?" If no one volunteers a time, I will suggest:

1. 1 week, 2 weeks or a month, depending on how long it will take to see results from the actions
2. In the group's next regular check-in - maybe they have a weekly or monthly time to check in on topics like this.

I will then ask who's going to schedule the follow-up and write that person's name and due date on the document. I try not to be the one to do this, because at this point in the meeting I am actively shifting responsibility back to the group.

<p style="text-align:center">*   *   *</p>

Ready for more? Let's try to improve a weekly team meeting.

Chapter 7: The Weekly Team Meeting

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Consent matters

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Spend at least twice as long preparing as the length of the meeting

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Rachel's Reverse Timeline

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Is it one workshop, several, or no meetings at all?

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Communicating the approach: To/by/so that

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Questions drive the agenda

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Write the agenda backwards

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What about just listing activities instead of questions?

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Ask the participants to help link the sessions

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Plan for both Divergence and Convergence

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Starting with silent work adds perspective

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Silent Brainstorm with stickies in meeting board software

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The calendar invitation is part of the space.

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Documents are familiar

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Boards make space for new thinking

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Your workshop is much longer than the meeting itself

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Notes

1 https://www.youtube.com/watch?v=iCvmsMzlF7o

2 https://brenebrown.com/book/daring-greatly/

3 Lencioni, Patrick M.. The Advantage (J-B Lencioni Series) (p. 184). Wiley. Kindle Edition.

4 This idea comes from Kristen Clacey and Jay-Allen Morris in their book, *The Remote Facilitator's Pocket Guide*, possibly the first book on facilitating remotely.

5 https://www.iaf-world.org/site/home/clients

6 https://tinyurl.com/23kub3pw

7 https://www.amazon.com/Getting-Done-Lead-Youre-Charge/dp/0887309585

8 Friedman D, Goldman R, Stern Y, Brown TR. *The brain's orienting response: An event-related functional magnetic resonance imaging investigation.* Hum Brain Mapp. 2009 Apr;30(4):1144-54. doi: 10.1002/hbm.20587. PMID: 18465750; PMCID: PMC2718677.

9 https://management30.com/practice/delegation-poker/

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