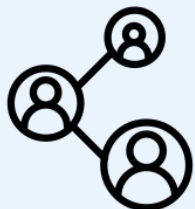# tana

Tana Guide - Helpful tips to facilitating online meetings

This guide is produced to provide helpful tips and guidance to facilitating online meetings. In the light of increased online-based work, ensuring good facilitating of online meetings and workshops is increasingly important for effective, participatory and collaborative work. This guide outlines the approach to different steps of planning, facilitating and following up on online meetings and project teamwork.

Agenda Item	Helpful Comment
Ground rules	We often overlook the importance of establishing ground rules for our interaction. These rules might help if you face very talkative/silent or challenging groups. You can state the rules at the outset of the meeting/workshop, or you can develop tailored rules together with your group: • We make room for everyone to speak and minimise our own talk time • We use the chat for questions when someone is speaking • Holding up your hand (virtually) if you want to say something • We are 100% on when we meet (so avoid checking e-mails etc.) • We only have meetings of 60 min (max. 90 min) • We will always use video (except for in large calls, where it compromises the network)
Preparation (Before the call)	• Check that you know how to use the platform yourself or learn about it ahead of time (potential try it out with a colleague) • Make sure to share agenda for the meeting as well as any preparation that participants of the call need to make prior (reading, preparing inputs to present etc.) • Share communication platform (e.g. Skype, Zoom) well in advance, including guidance so people know how to connect successfully. Do you need everyone to watch a presentation or demo in real time? Do you need to play a video? Then screen-sharing software is a must. • Decide whether people should provide input at the meeting and give them specific guidance to this (presentation style, duration, content etc.). Also warn them ahead of time that it will be a video call. • Assign someone to take notes of the call ahead of the call • Check the technical equipment, sound, microphones etc. Connect to the call before the participants (possible with a colleague to make sure it's ready) • If you want to use 'break out rooms' for group work (e.g. using Zoom), you need to prepare this ahead of time with participants. • Consider if you want to record the call (either voice only or video) to be able to share it with other people who could not attend or for documentation purpose. If you decide to record it, you should inform participants in advance,

Connecting to the call (technicalities)	• Troubleshoot connectivity issues in advance • Ensure sound, visuals and presentation showing mode is working • Remember to tell people to mute themselves when they're not talking (remind them of this throughout the meeting).

Framing at the start of the call	• Introduce <u>people</u> on the call (ask people to be brief). Create a good atmosphere so people feel comfortable and clarify roles and responsibilities. This might include allowing a few minutes of casual conversation.
	• Introduce the <u>purpose</u> of the meeting (this is often forgotten, and people just jump straight in)
	• State the expected <u>duration</u> of the meeting
	• <u>Timeframe each topic</u> if there are several for the agenda
	• State the <u>expectations of participation</u> and contribution to meet the end goal
	• Explain key rules for the meeting if you have any (see suggestions above)
	• Practicalities:
	    ○ Tell people to open documents/presentations etc. that you need them to be looking at (unless you're sharing your screen)
	    ○ Also explain how you will go around the 'break out'-rooms (if you're using this feature).
	    ○ Make sure that people know if the session is to be recorded.

During the call	• If you ask open questions or take a round of inputs, clearly appoint who should talk, or the order of people's input to avoid uncomfortable silence, which creates insecurity or several people talking at the same time • Make sure to reiterate questions/inputs from participants if the sound quality is poor to make sure everyone is one the same page • Alternatively ask people to type questions so everyone can follow the conversation/questions in writing • Check in with people along the call with questions such as 'do you have any comments/questions?' or 'can we go on?' (and <u>remember</u> to wait longer than you think for answers/feedback). • Make sure to state if the conversation goes of topic and go back to the intended discussions • If connectivity proves to be <u>too bad</u>, make the decision to cancel the call and re-schedule or find an alternative way to communicate.

Closing 	• Wrap up the meeting and summarise any action points/agreements made. • Agree where to put documents (e.g. Dropbox, Google docs), or which platforms you will use to communicate (e.g. Slack, Microsoft Teams, WhatsApp etc.) • Established deadlines and assign responsible persons. • Share what will happen now (next steps in the process)? Will there be another call/meeting and what time? Who should participate?
Appreciation and feedback 	• Ask meeting participants for feedback on how the meeting went and how it could be improved in the future. • If it's an internal meeting/workshop where trust has been built you can use 'Fist of five' – ask participants to show the number of fingers of how well they thought the meeting went (1 - very bad and 5 – very good). Remember to have this as an agenda item. Ask only for feedback from a few, in case the rating is very low. • Thank people for their contributions, patience, questions etc. • Explain how their inputs will be taken forward
Follow-up (post-call) 	• Share documents, meeting notes, contacts following the meeting. • Reiterate the action points agreed during the meeting and agreed deadlines • Invite people to the necessary platforms (e.g. Dropbox, online platforms) • Outline expectations to next meeting

Useful Online Tools & Platforms	• Zoom: https://www.zoom.us (Internet based video conferencing and meeting spaces) • Skype for Business: https://www.skype.com/en/business/ (Online video conferencing, call and chat platform) • GoToMeeting: https://www.gotomeeting.com/da-dk (Online video conferencing, call and chat platform (Meeting rooms, video conferencing and webinar, also good for secure web conferencing) • Microsoft Teams: https://products.office.com/en-us/microsoft-teams/group-chat-software (Comprehensive chat, meeting/conference room, file storing and web-based learning platform) • Trello: https://trello.com (Joint project management collaboration platform)

This guide is meant to be a working document. If you have any questions or ideas for further input to the guide contact Nadia on nmp@tanacph.com.