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Facilitation of a distributed electronic meeting

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Facilitating a distributed electronic meeting with remote participants is easier than you think. In fact, if you have a PC and access to the Internet you are probably ready to run a meeting where one or more participants is not in the same room with you. But why would you ever want to do this? How is it done? What is it like for the facilitator? What is it like for the participants? Based upon my experience at Ventana Corporation, I will answer these questions and more.

Electronic collaboration

The origins of operational electronic meeting software date as far back as 1982, at the University of Arizona. The constantly evolving practice of electronic collaboration grows and changes. It wasn't until 1986 that remote electronic meetings were held using PCs connecting directly to each other via modem, allowing participants to be 'distributed'. The objective of these early meetings was to enable teams to continue collaborative projects away from the meeting room using the same tools and activities available to them in the meeting room.

Distributed meetings are on the rise. A recent survey of 2,800 people indicates that ten years ago it was quite unusual to have someone participate in a meeting from a distance. However, by 1998, 17% of meetings included one or more remote participants. According to Lee Walker, Vice President of Product Development at Ventana Corporation, "Our clients currently use GroupSystems® in distributed meetings for federal emergency response, SAP implementation, Year 2000 planning, strategic planning, and more."

A headache-saver

Ventana Corporation's team of facilitators, trainers, and technographers (GroupSystems operators) are separated by over 2,000 miles and three time zones. When I joined the team, our Monday morning status meeting consisted of a conference call via speakerphone between the Tucson and the Washington, D.C. offices. One person served as the scribe to the conference call, recording the data to be shared with the rest of the company. This status meeting often lasted over an hour, and frequently had to be rescheduled due to schedule conflicts.

Upon investigation, our team determined that our weekly status meeting did not require all participants to be "present" as long as their information was otherwise available. Thus, a facilitated synchronous conference call to augment the electronic meeting has saved us time, money, and a few headaches.

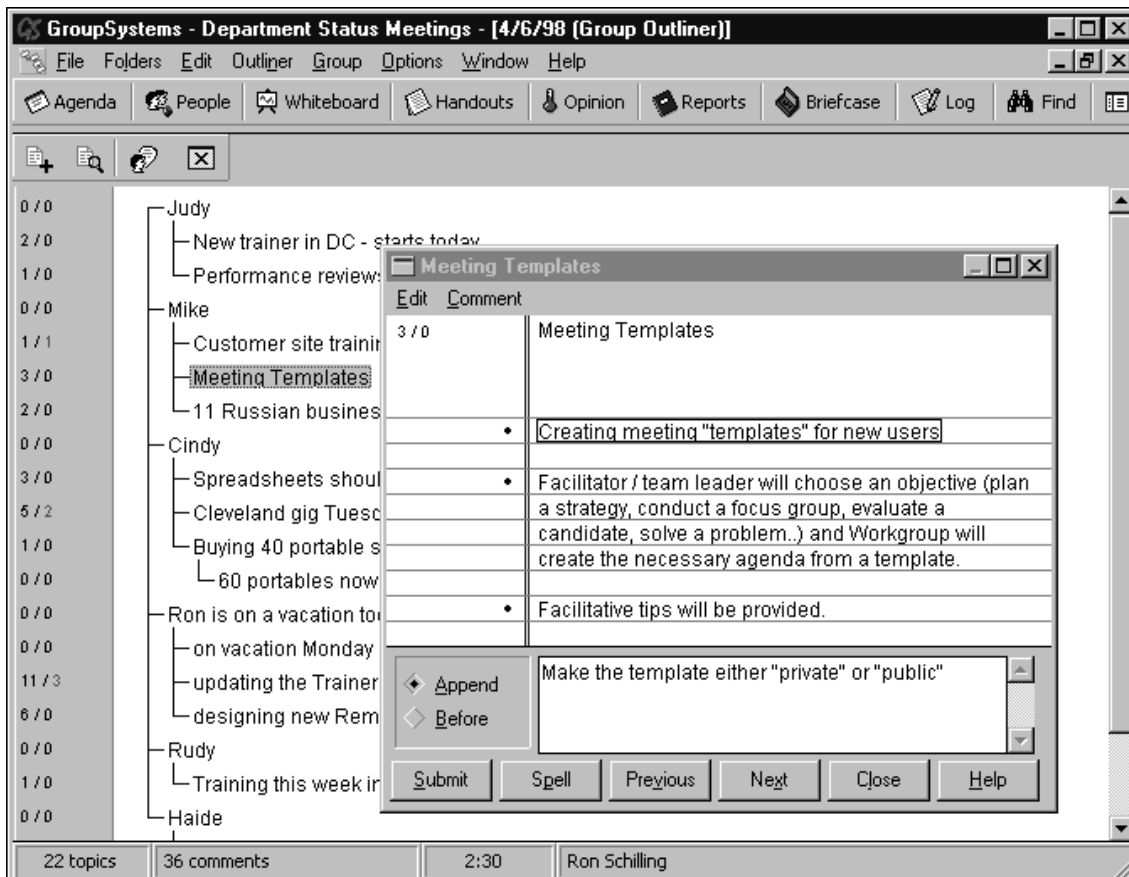
How we did it

GroupSystems in a distributed environment allows all participants to access a "Department Status Meeting" activity weekly and input their tasks at the end of the week. The same-time status review meetings include any employees that can attend at the pre-designated time; others catch up on the verbal discussion recorded by the technographer/scribe. The ingredients for success include: a facilitator, one GroupSystems laptop for each participant, GroupSystems via web browser for remote participants, and a conference call for verbal discussion.

The process:

1. Prior to the end of the week, the facilitator sends an electronic invitation to the meeting participants. Upon acceptance of the invitation, the participant is brought into an activity that looks like a hierarchical outline. Each employee's name has been entered as a branch on the outline. Employees are instructed to report on the status of pending items and add any new items as sub-branches.
2. Employees are instructed to read through each other's "reports". By double-clicking on the sub-branches, questions and comments can be entered. [See Figure below.]

- Each Monday morning at 8:00, a same-time meeting is scheduled for those able to 'attend'.



- During the meeting, the facilitator makes sure that all participants are heard verbally. She highlights key activities and asks if there are others that need to be explained or elaborated upon. The technographer/scribe adds notes as necessary to the outline activity.

Notes:

- ✓ Prior activities are left open so participants can refer back to past meetings at any time.
- ✓ Other Ventana employees are given access to the status report in view-only mode.

Without going into the technical side of how distributed meetings are accomplished, suffice it to say that if you and your meeting participants have Windows, Internet access, and a browser, then you're ready to run a distributed meeting.

Importance of facilitation support

While many teams are self-guiding, a facilitator is key to a successful distributed meeting (or project). The facilitator is the one to manage group dynamics and group process issues. The stage of the group's development and the nature of the task(s) influence the practicality of distributed meetings. For example, distributed meetings are usually more practical when they are part of a team's ongoing work on a project. A high performance team understands and is committed to the task, has explored alternative ways of achieving it, and knows what must be done. Examples of tasks well suited to distributed meetings include fact finding, ongoing information exploration and sharing, and reporting.

Distributed meetings require the same careful planning and facilitation that face-to-face meetings require. Keeping the group on-task and focused can be accomplished in the following ways:

- ✓ Provide a clear meeting objective and get the group's consensus to work together on it;
- ✓ Break the necessary activities and tasks into manageable timeframes;

