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[ADAPTING TO CHANGE]

Operating effectively in a new and evolving environment

How to plan and facilitate remote work sessions as the world rapidly expands Casual Fridays to include the rest of the week.

MARCH 2020

As part of CGI's ongoing commitment to providing clients with world-class IT consulting services, we created a quick start guide to **planning and facilitating productive remote working sessions.**

While in-person work sessions typically operate seamlessly while participants are physically in the same room, remote work sessions generally work best as a series of smaller, focused sessions. We've created a series of Work Session Prep Packets to aid in setting up work sessions and onboarding remote participants. Included in these packets are overviews of work session activities and templates that can be used in crafting your own remote work sessions.

REMOTE FACILITATION BEST PRACTICES

Being effective with dispersed teams requires thoughtful planning to ensure seamless execution.

BEFORE THE SESSION

Plan for pre-work – Optimize your time together by allowing attendees to get up to speed before the work session begins. For example, you can pre-record the lecture portion or information to be shared and ask attendees to watch in advance. Record picture-in-picture or voiceover as you review slides. Try to keep it under 20 minutes, tops.

Control participant input – With remote work sessions, people often speak over one another or sit back and let others do the talking. Help avoid this at the start by establishing rules for input. Plan for how to gather feedback, questions or ideas first, then allow them to take turns sharing, or divide into smaller groups for discussion.

Stay focused – Keep things on track by having your material in place first, then revealing information as needed. In a slide deck you can use animation "builds" to walk through topics in stages. On a shared board, "hide" items by covering them with an opaque rectangle and remove them as you're ready to discuss..

Break things up – It's challenging to keep groups engaged online over long time periods. Schedule two or three shorter sessions instead of one long one. Plan activities that allow people to break into smaller groups and then rejoin the full group at a designated time. Thinking through the day's agenda and breaking into components, each with clear goals, will help keep things productive.

Send out a work session prep packet – Use our template to customize the prep work needed to properly facilitate your online working sessions. The Remote Work Session Prep Packet outlines the cadence of sessions, a description of each, as well as a list of online resources and web-based tools that will be leveraged for the planned activities.
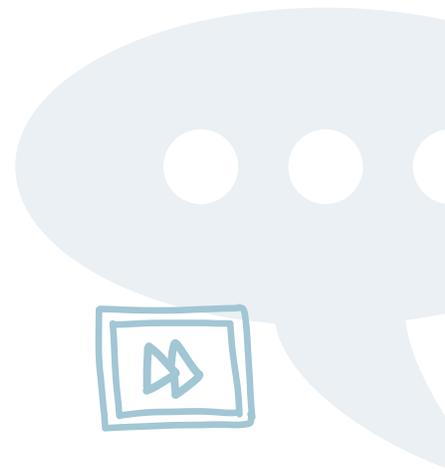
Choose tools that have caption features so that all participants can follow the conversation. Captions help everyone: hearing-impaired, those who aren't using their native language, and anyone with a bad internet connection. Some tools allow for real-time AI captioning, and others allow for manual captioning.

DURING THE SESSION

Plan for consistent engagement – Find ways to intentionally get people up and out of their seats to keep energy levels high, even if they are alone in their home offices. Think through how you are going to keep attendees engaged with the content, with the facilitator, and with each other. Use a warm-up activity to give participants a low-pressure way to get to know new tools.

Establish standards – We find it much easier to mitigate issues with consistent and thoughtful planning. Some basics to consider:

- Ensure that all attendees have **video capability** and consider testing sessions the day before to troubleshoot any individual issues
- Draft **instructions** for each activity and make them readily available near the online workspace and easily accessible during the session
- Create a **clear agenda** for the entire **work session**, including time alloted and an identified leader or speaker for each activity or session. Reference the agenda throughout and identify volunteers to be timekeepers (to give notice before you run over time for a section) and note takers. (In lieu of notes, you can also record the sessions.)
- Create **teams ahead of time** that will work together during the session and possibly between multiple sessions
- Form teams with people in the **same or adjacent time zones** to allow them to more easily schedule homework collaboration time in between sessions
- Set up a **separate online workspaces** for each team as well as one to use with the whole group (make sure there is a section on each board for specific exercises)
- Be sure to **pre-load each section** with templates, examples, and other materials that people will need during the event
- Remember to ensure a **"Parking Lot"** space is easily accessible and visible throughout the work session
- Share **links** to all online workspaces, boards and documents ahead of time
- Add and **lock down key elements** like instructions and grids onto layers to prevent accidental moving or deleting
- If appropriate for the session, ensure everyone keeps their **cameras on** at all times
- Run through **microphone etiquette** and function at the start of the session.
- Look for **signs of slowdowns** in activity - less cursor movement, fewer notes being added - these are signs to keep the session moving.
- Present information in sections, then **pause for questions** to ensure that everyone is able to follow along.
- At the end of the session, do a **brief retrospective** on the experience (Treat this as an expected and planned part of the agenda.)
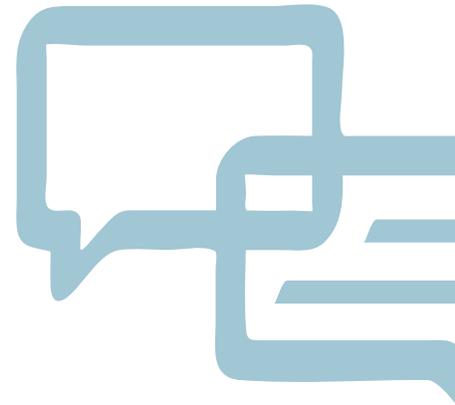
To access the Remote Work Session Prep Packet template, email us at **usdigital@cgi.com**.

Follow-up immediately – Share key takeaways and action items (next steps) as soon as possible. Quickly prepare a document recap with screenshots and key highlights from the session. If the session was recorded, edit and share in useful clips highlighting key moments rather than one long video. Participants are more likely to view meaningful clips than review the entire session again.

Measure success – Follow up with a survey that allows participants to (anonymously) talk about what worked and what didn't, so you can improve your next work session!

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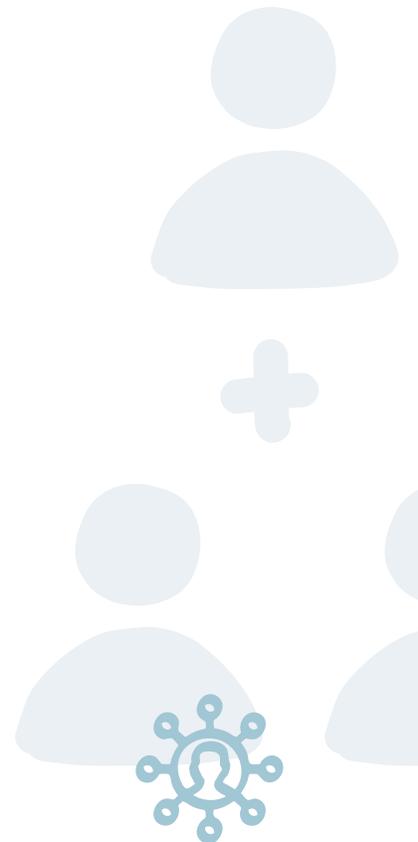
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Learn more at **www.cgi.com**

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