



# An Integral Approach to Remote Facilitation

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Gregor Bingham, Caroline Bouchard,  
Ciro Fleury, John-David Longwell,  
Nikki Naiser

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*“In the SubtleNet [Thomas Hubl] everyone has a kind of network address that can be reached energetically much in the way we send email over the Internet. The SubtleNet provides a way to communicate that greatly expands our ability to relate to each other beyond email, text, Twitter, etc. because it complements those innovations.*

*This is the kind of innovation that stands at the intersection of ‘poetic science’ and could change our way of being.”*

—Rebecca Ejo Colwell

“A Lesson From the IF Journey”

$$E=VC^2$$

(Effectiveness=Virtual Connectivity Squared)

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**We envision** a world where the deeper, more satisfying and more efficient engagement and collaboration gained via IF competencies empower geographically dispersed groups through technology.

**Our mission** was to test and validate Integral Facilitation techniques and technologies to facilitate remote groups in service to their goals and objectives.



# Why is Remote IF important?

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- Distributed workforces are on the rise worldwide
  - Access to broader talent pools
  - Significant reduction in operating costs and carbon imprint
  - Higher worker satisfaction through flexible working
- Communication and low employee engagement are big and costly issues
  - 38% of virtual teams say communication is their biggest issue ([Software Advice](#), 2014)
  - Worldwide, only 13% of employees working for an organization are engaged (31% US). This employee engagement crisis has serious and potentially lasting repercussions for the global economy. ([Gallup Business Journal](#), January 7, 2016)
- Bringing IF competencies to remote settings can impact the world through improved collaboration.

# E=VC<sup>2</sup> Pod Process

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This is The Martian,  
representing the  
difficulty in  
connecting  
remotely!



1. First, we integrated IF competencies in a real-world strategic planning facilitation conducted by one of our pod members, tested with the entire pod.
2. We examined the 40 IF competencies and prioritized 19, across all four quadrants, that present unique challenges in remote facilitations.
3. For those 19 IF competencies we developed IF Best Practices for Remote Facilitations, based on our real-life experiences.
4. We then summarized the benefits of some of the tools we used over the course of our project.

# Key Challenges in Remote Facilitation

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1. **Limited attention and time:** In video and phone conferences attention spans are shorter because participants may experience more “idle time.” This constrains the time allocated for the agenda.
2. **Sensory constraints:** Without subtle visual cues, full body language or tactile means, facilitators and participants can have difficulty identifying how people are feeling or whether they’re fully engaged.
3. **Technical difficulties:** At best technical difficulties are distracting, and at worst they can undermine a well-planned facilitation.

# Distinctions in Approach for Remote IF

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1. **Preparation:** Create a backup plan in case technology fails, and interview each participant 1:1 to help understand individual roles and group dynamics. Your agenda should include only those items that need real-time interaction.
2. **Pre-work:** Engage the group, inform the discussion and build trust ahead of time by assigning a 15-30 minute task a week prior to the session.  
Examples: A reading, a survey, contextual data.
3. **Energy and Engagement:** Remote can get boring. Be super-vigilant in tuning in and be ready with energy boosting activities and techniques.
4. **Flexibility:** Be on your toes. Show grace in handling unexpected tech issues.
5. **Keep it Simple!** Technology is a tool. Don't try to use every feature available.

# Appendices

A. Remote IF Process

B. IF Best Practices  
for Remote Facilitation  
by Quadrant



# Appendix A

## Remote IF Process

# Remote IF Process

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## 1. **Facilitator Preparation:**

- ✓ Create a backup plan in case technology fails
- ✓ Interview each participant 1:1 to understand roles and group dynamics
- ✓ In planning your live session agenda, include only those things that need real-time interaction.

## 2. **Participant Pre-work:**

- ✓ Engage the group, inform the discussion and build trust ahead of time by assigning a 15-30 minute task one week prior to the session.
- ✓ Pre-work examples: A reading, a survey, contextual data.
- ✓ Be clear in the assignments as some pre-work may apply to specific roles.

# Remote IF Process

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## 3. Meeting Start:

- ✓ Ask each participant to check in so people are engaged and ready to work.
- ✓ Reiterate the meeting objective/intention and agenda.
- ✓ Review the Ground Rules and ensure everyone agrees with them.

## 4. During the meeting:

- ✓ Be super-vigilant in tuning in; be ready with energy boosting techniques.
- ✓ Be on your toes. Show grace in handling unexpected tech issues.
- ✓ Keep it Simple! Technology is a tool. Don't try to use every feature available.

## 5. Meeting close:

- ✓ Review next actions; ask for weigh in on goal achievement for the meeting.

# Appendix B

IF Best Practices  
for Remote Facilitation  
by Quadrant

# Facilitator Awareness

Upper Left Quadrant

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# Intentionality

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*Challenge:* Focus can be more difficult in remote groups, and participants may leave the group, veer from the objective or lose concentration.

## *Best Practices*

1. Establish structure and focus by clearly communicating the session's intention or objective ahead of time. The intention can include more subtle aspects, like maintaining a playful, creative approach in a planning session.
2. Keep the objective front and center. Depending on the group and technologies, ask people to write down the intention to have it handy. This helps people take ownership even when they are not in the room.

# Mindfulness/Awareness

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*Challenge:* Without in-person contact, remote facilitations challenge our abilities to tune into the participants and the group as a whole.

1. Be mindful about making the process a little more personal, especially if people are on audio only. Naming people and probing comments coheres the group and prevents the conversation from moving into “object” mode.
2. Set firm Ground Rules that demand full attention: Silence phones; refrain from checking texts, email, and voicemail; do not mute; stay in the room.
3. Check-in with all the other competencies! Relaxing into an open field of awareness will elevate the experience for the participants.

# Not knowing

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*Challenge:* Remote processes can cause facilitator anxiety and undermine the “not knowing” mind and the ability to guide the group’s curiosity.

1. Be knowledgeable about your structures, technologies and alternative plans.
2. Help keep the group connected through this guided principle of curiosity.
3. Don’t assume silence is agreement. Check-in with people and be curious about what is happening for them.



# Trusting the Process

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*Challenge:* Building trust among participants is harder when remote, and trusting ourselves as facilitators is complicated by our reliance on technology.

## *Best Practices*

1. Build trust with and among participants BEFORE the session.
2. Use video rather than only audio for the benefit of body language signals.
3. Make sure everyone gets heard and keep track of names to avoid “checkout.”
4. Remote means you cannot wing it and you can’t cover as much. Invest more than usual in the planning and accurate scope and scale of the session.

# Clarity

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*Challenge:* Technical issues can make it difficult to understand what people are trying to communicate.

1. Before the meeting, ask participants to use the fastest connection available.
2. During the meeting, ask participants to let you know when they can't hear or understand people, and be aware of understanding of foreign accents.
3. Remind and inquire about the session's intention if clarity is flagging.
4. If there are side-conversations bring them out into the open.
5. Ensure all participants can see and understand shared visual components. Consider a second computer to serve as a backup camera on the material.

# Being Fully with What Is

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*Challenge:* Remote presents potentially distracting technology glitches, shorter participant attention spans and limited physical expression.

## *Best Practices*

1. Be prepared to recognize and handle the disconnection that may happen if the energy gets low and people start to “checkout” early.
2. Be attuned to each participant’s ability to clearly hear and understand.
3. Be ready for technology glitches, stay in the process and allow for flex-flow.
4. Free yourself to be fully present by delegating tech support and note-taking.
5. Work with a group size you can handle effectively.

# Facilitator Behavior and Skills

Upper Right Quadrant

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# Embodied Presence

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*Challenge:* Visual cues and expressions are limited and technical difficulties can obscure awareness.

## *Best Practices*

1. Show leadership *before* the session through pre-work and agenda setting.
2. Ensure all participants are heard, even if there are technical difficulties.
3. Guide the energy to keep focused on the intention.
4. Hold interest through voice inflection, gestures and facial expression.
5. Challenge the space a little when energy wanes to serve the intention.

# Listening, Empathizing and Reflecting

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*Challenge:* In the absence of full sensory input the facilitator's role in ensuring participants are heard is heightened.

## *Best Practices*

1. Check in with participants regularly, e.g., "How is this process going for you," "What do you think about that?"
2. Ask the scribe to synthesize important points for all participants to see to maintain coherence. This doc can also serve as notes to be distributed to participants later.

# Providing Focus, Direction and Timekeeping

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*Challenge:* Remote facilitations are more time-constrained due to shorter attention spans online or over the phone.

## *Best Practices*

1. Assign pre-work (30 minutes max) to contextualize history, initiate creative thought and help participants mentally prepare.
2. Ask all participants to log on 10-15 minutes prior to the start time.
3. Plan for the agenda to take longer, as generating coherence can take time.
4. Learn what you can about cultural or shadow dynamics before the meeting.
5. If time is crunched, guide participants to prioritize and adjust expectations.

# Energetic Assessment

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*Challenge:* It can be difficult to feel the energy of “the room” and especially difficult to keep remote participants engaged.

1. Have participants check in from time to time. “How are you feeling about this process?” “What’s coming up for you right now?” “Is the purpose still clear?” “Is our approach working?” “Are we making progress?” “Is the pace ok?...too fast?...too slow?” “Have we lost anyone?”
2. Spark energy: Play a game that gets people to stand up, or inspires silliness.
3. Schedule breaks and be willing to be flexible in the timing.
4. Inform participants about session progress and what remains on agenda.



# Understanding Groups

Lower Left Quadrant

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# Safety, Openness and Rapport

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*Challenge:* Some people aren't as comfortable and trusting in remote settings.

## *Best Practices*

1. Devote time to check the level of comfort with this type of experience--at the opening of a session, in the middle and at check-out.
2. Get to know participants in advance and chat while waiting for the session.
3. Build a solid container by assigning pre-work, keeping on the intention, creating a solid structure and designing ground rules specific to remote.
4. Be helpful and empathetic—and have humor—in the face of technical issues.
5. Ask more engaged people to start or kick in to help encourage participation.

# Cultural Competence

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*Challenge:* Cultural differences can be exacerbated in remote facilitations; facilitators can't observe informal interactions of participants.

1. Know your audience: Learn as much about the individuals and the group dynamics as you can before finalizing your session plan.
2. Consider structured pre-work to help participants understand cultural differences, whether across business units, nationalities or other groups.
3. Map themes to your audience and create specific ground rules if necessary.
4. Ask participants to alert you if they are not able to understand others.

*Suggested reading:* *The Culture Map* (Erin Meyer); cultural identity discovery tools

# Relational and/or Emotional Intelligence

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*Challenge:* It's hard to notice uneasiness or a new idea ready to emerge. Even with video, eye contact is off target and out of sync and body language is obscured.

## *Best Practices*

1. Empathize, name and be present to emotions. This will build trust, allow the group space to breathe and bring up the energy level.
2. Be careful not to ignore emotions; they are guideposts to valuable insights.
3. Be alert to interplays that may need to be processed for things to move on.
4. Consider potential emotional ingredients before the meeting and use this foresight to prepare to be empathetic upfront.

# Power Politics

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*Challenge:* Remote facilitation presents both the challenge of ensuring all are heard and the opportunity to balance power through anonymous input.

## *Best Practices*

1. Conduct pre-work interviews to raise awareness of roles, personalities and power or hierarchy issues that could impact the session.
2. Exert your role as facilitator: Be crystal clear on the intention and your responsibilities for steering the group so that all participants are heard.
3. Use tools that enable anonymous brainstorming, prioritizing or polling to circumvent power issues. Every idea carries equal weight.

# Shadow Work

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*Challenge:* It can be especially difficult to be aware of shadows when limited by the sensory constraints of remote facilitation, especially with unfamiliar groups.

## *Best Practices*

1. Develop an understanding of the individual and group dynamics ahead of time through 1:1 conversations. “What is your experience working with this group?” “What is your role and how are you involved in decisions?”
2. Limit the size of the group if possible, to make it easier to tune in.
3. Be acutely aware of unspoken tension and ask permission to discover what is going on, as trust can be more challenging in remote settings.

# Supportive Structures

Lower Right Quadrant

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# Coherence Tools

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*Challenge:* When each participant sits in a separate “universe” with covert distractions it can be difficult to bring the group into coherence.

1. Limit online facilitation sessions to 90 minutes--two hours max.
2. Present a solid agenda with check-ins to make sure the group is finding the process meaningful, and a short break to check messages.
3. Ask individuals to reframe the past few minutes to keep everyone on task.
4. Engage the entire group with active brainstorming--internal and then share.
5. Recruit a scribe to keep a running synthesis and share key points.
6. Set expectations regarding accountability and roles in the Ground Rules.



# Decision Making Protocols

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*Challenge:* Tools and methods for arriving at decisions in traditional in-person settings may not be available remotely.

1. Consider online survey pre-work to help inform in-session decision making.
2. Research decision-making tools in the remote platform you will be using (polls, surveys, Google forms); decide whether they will meet session needs.
3. If not intuitive, distribute tool links/instructions via a shared document.
4. Consider the simplest tools, too: show of hands, vocal agreement.
5. Use a slide deck in-session (e.g., Google slides) when visuals or ideas are to be considered, and guide participants to each relevant slide.

# Processes for Creativity and Innovation

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*Challenge:* Many technologies can engage remote groups in creative processes. The challenge is to select the simplest, most effective solution for the objective.

## *Best Practices*

1. Spend time researching the best use of technologies, remembering that it is powerful vision that drives innovation, not the tools.
2. Consider pre-work retrospectives: Before the session ask participants to post online “things we have done well,” and “things we can improve.”
3. Consider using powerful scenario planning forms like the ***pre-mortem*** (from Freakonomics).

# Ground Rules and Governance

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*Challenge:* Since time is limited in remote facilitations, it's especially important to establish rules that keep people focused and lead to a productive meeting.

1. Send the Ground Rules out a few days before the meeting so people will understand you expect 100% focus and will adjust schedules accordingly.
2. Explain the rationale. For example, asking people to stay off mute or close other browser windows helps them stay present and resist multitasking.
3. Insist that everyone prepare. Spell out what is needed by whom, and why. And be fair about the amount of time you expect to be invested and the time allowed to complete the pre-work.

# Video Conferencing Platforms for Remote Facilitation

*The E=VC<sup>2</sup> pod used these platforms during the time we created this work. Many other useful platforms are available.*

Platform	Best Use	Limitations
<b>Google Hangouts</b>	<ul style="list-style-type: none"><li>• Free voice and video conferencing with messaging for Google+ subscribers</li><li>• Screen sharing</li><li>• Whiteboard; recording via YouTube</li></ul>	<ul style="list-style-type: none"><li>• Limited to 10 participants (Google Apps for Business or EDU accounts allow 15).</li><li>• All participants need a Google+ account.</li><li>• Calendar entry and email links can differ</li></ul>
<b>Skype</b>	<ul style="list-style-type: none"><li>• Free voice and video conferencing with messaging</li><li>• Screen sharing</li><li>• Whiteboard &amp; recording via apps</li></ul>	<ul style="list-style-type: none"><li>• Skype recommends video calls up to 5 people; voice calls up to 25</li><li>• Potential platform compatibility issues</li></ul>
<b>Zoom</b>	<ul style="list-style-type: none"><li>• Free voice and video conferencing with messaging</li><li>• Screen sharing with co-annotation and whiteboarding</li><li>• Breakout rooms</li></ul>	<ul style="list-style-type: none"><li>• Free version is limited to 50 participants</li><li>• Free version is limited to 40 minutes per call</li></ul>

# Collaboration Tools for Remote Facilitation

*These are tools the E=VC<sup>2</sup> pod used during the time we created this work. Many other useful tools are available.*

Platform	Best Use	Limitations
<b>Google Docs and Google Slides</b>	<ul style="list-style-type: none"><li>• Free cloud-based collaboration for document and presentation sharing</li><li>• Up to 10 can simultaneously edit; up to 200 can simultaneously view</li><li>• Real-time chat</li></ul>	<ul style="list-style-type: none"><li>• Requires Google+ account to view or edit.</li></ul>
<b>Facilitate Express</b>	<ul style="list-style-type: none"><li>• Online meeting room (pre-work), flipchart software and tools for brainstorming, categorizing, prioritizing, and instant documentation, with a variety of survey/voting tools.</li></ul>	<ul style="list-style-type: none"><li>• No free version--subscription cost is \$999/yr but negotiable for shorter periods.</li><li>• New product Cilistorm to be released 2016; \$299 annual subscription (subject to change), limited to one topic per session.</li><li>• Requires 3rd party video- or phone conferencing platform.</li></ul>