

So Far, So Good

Transforming from a real-world facilitator to a virtual one

By Jim Cain

If I had been invited to facilitate a virtual event just a few months ago, I probably would have referred the client to someone more experienced or passed on the opportunity completely. To be perfectly honest, I was neither ready nor competent in such an enterprise. Fast-forward a few months, and suddenly things look a lot different. I've just experienced one of the most rapid and intense learning curves of my life, and it's not over yet.

In some form or other, I've been a group facilitator all my life, but only recently have those skills been tested in virtual space. If you are reading this, then perhaps you are a facilitator, teacher, trainer, manager, camp counselor, or some other kind of group leader who is wondering how to make the transition from real-world group dynamics to presentations in the virtual world. I feel your pain. I've experienced your pain.

Now seems as good a time as any to stop for a second and consider just how far I've come. Here is a collection of powerful insights I've gained recently.

Connection Before Content

Sequencing is as important in virtual space as it is in the real world, and most facilitators have a long list of icebreaking and opening activities. Some of these activities can easily be transferred to virtual events, even if breakout rooms (the virtual equivalent of small groups) are required. What I've learned, however, is that time management is required so the entire content of a virtual event is not taken up merely by the connection component of the event.

Connection before content? Absolutely, but manage the available time and use technology, like breakout rooms, to assist in this process.

Oh My, Is That the Time?

In almost every virtual event I've attended this year, it was immediately apparent which events ran on time and which did not. The best events had a presenter sharing content and at least one additional technician who coordinated such items as breakout rooms, chat, and other video-conferencing possibilities. For one person to try to do all these at the same time is a little like juggling three different objects. My recommendation is to divide and conquer. Let one person deliver content while someone else handles the technology issues, including time management.

All The Bells And Whistles

If I've learned anything about virtual facilitation so far, it's not to get overly enamored with technology and gadgetry. Simplicity is absolutely the best policy. Anything you can do to minimize the total bandwidth of your broadcast helps those on the far ends of the worldwide web. Put effort into the content of presentations rather than gadgets and gimmicks.

The Limiting Factor

In the real world, one of the limiting factors in outdoor teambuilding programs is the choice of clothing worn by participants. Those who arrive for a ropes-course event in business suits and impractical footwear are probably not going to gain as much as participants who are appropriately dressed for the occasion. In the virtual world, the limiting factor can be bandwidth and internet connectivity. As a virtual facilitator, you can only progress as fast as the slowest internet connection of your participants. (This reinforces the above statement about technology and gadgetry.) Simplicity

is important. Special effects, cool graphics, and other technical wizardry take valuable bandwidth. Use them with discretion.

The Size Of The Group Matters

As in the real world, the style of a facilitator changes with group size. Fill a breakout room with more than 50 people and I guarantee that some of those folks will never have the opportunity to be heard. Host an event in webinar format, and you eliminate the opportunity for connection between the participants.



I am indicating what my suggestions are for various virtual events, but eventually you will have to decide for yourself, or even more likely, present different activities depending on the size of the group. Just realize that the size of the group matters. If you truly want to create connection and communication among participants, then breakout rooms with appropriately-sized numbers are essential.

What Got You Here Won't Get You There

The title of this 2007 text by Marshall Goldsmith and Mark Reiter illustrates a key point. The skills required to achieve one level of a pursuit are not necessarily the skills required to reach higher levels, and in many cases, the skills are different for each level.

The skills that make teachers, trainers, and facilitators competent in the real world are not necessarily identical to the skills required with virtual groups. The good news is some talents transfer directly, such as time management, encouraging participation, organization, leadership. Other skills, however, such as the ability to lead a group in an activity where you

cannot read body language, will require a higher level of preparation and mastery. And how do you achieve a higher level of mastery? Read on.

Carnegie Hall

It's like the old joke that asks, "How do you get to Carnegie Hall?" The answer (of course) is "Practice, practice, practice." So, "How do you get to be competent in virtual facilitation?" "Practice, practice, practice." Practice long enough and hard enough, and you might even become an expert. The bottom line is not to worry. We are all going to become better at this, but understand there are no shortcuts when it comes to virtual facilitation. The only way to get better is to practice.

Find Yourself A Mentor

Years ago, when I was running 10K races, I learned it was helpful to train with a partner who was a little better than I was at the time. When I switched from road racing to cycling, it still was true. The same is true for virtual facilitation. One of the best ways to improve your personal learning curve is to find a mentor and ask for help.

It's Called A Comfort Zone For A Reason

I don't think there is any question that many—if not all—facilitators live a little outside their normal comfort zones when it comes to virtual presentation. That's okay. You are right on schedule but, nonetheless, into the growth zone we go. Kicking and screaming if necessary, but still we go.

Being open to the possibilities of virtual facilitation is part of a growth mindset, according to Stanford psychologist Carol Dweck. For years, we've told our students and participants about this possibility. Now it is time to take a healthy dose of our own medicine.

Perfection

Nobody said this was going to be easy or perfect, so stop expecting it to be. The good news is most of our participants are also experiencing a time of rapid growth and changing technology, so they tend to be more forgiving when new technology breaks down or a facilitator's internet connection fails, or dozens and dozens of other potential shortcomings of the virtual world occur. So, stop expecting perfection. Give yourself a break. I'm not suggesting you should not prepare as

best you can, but for heaven's sake, don't be so afraid of making a mistake that you fail to make any impact at all.

Many of us have been facilitating for so long that we've forgotten what it was like when we first began. We struggled, we made mistakes, and we got better. I doubt there is a single teacher, trainer, facilitator, or group leader on the planet who hasn't stumbled in transitioning from the real world to a virtual one. If you're not making any mistakes, perhaps you're not trying hard enough.

There Is No Way To Put The Genie Back In The Bottle

Now that a majority of the world has had a taste of virtual meetings and events, it will be impossible to go back to the way things were. In the future, there will always be a question of whether to gather for an event in the real world, or the virtual one. Fiscally responsible corporations are absolutely going to compare the cost/benefits of meeting in real space vs. virtual space, especially when considering the various outcomes they wish to achieve by hosting such an event in the first place. So, it is probably best to realize that virtual facilitation will be with us for a while, perhaps forever.

A Reasonable Amount of Optimism

Optimism during a global pandemic seems strangely out of place. Yet, even while the numbers of cases are increasing, perhaps even affecting those we personally know and love, there is still reason to be optimistic. For decades, I've seen the benefits of good facilitation. That work will definitely continue, albeit in a different form, with appropriate physical distancing. True, the world threw us a curve ball, but I doubt even a global medical emergency can dissolve the needs of nearly eight billion people to connect. It is hardwired into our DNA, and facilitators are absolutely brilliant in helping people connect. The goal is not merely to survive but to thrive. Now get busy. The world needs what we know now more than ever.

The Best Day of My (Facilitation) Life

On Wednesday, August 17, 2005, Allison Phaneuf and I were facilitating a teambuilding event for about 30 participants from a major corporation. It was our third quarterly event for this particular work team. Somewhere, right in the middle of the program, a spark of inspiration came. After a particularly insightful activity,

Allison and I circled the group and performed what for me was the highlight of my entire facilitation career—a 90-minute debrief largely controlled by the group itself. It was magical, and I remember it to this day.

On Wednesday, June 24, 2020, I had my best day (so far) as a virtual teambuilding facilitator, which is good news because the previous event had been somewhat of a technical disaster. This latter event was the first time I believed I can do this. I'm sure there will be other great moments in virtual-group facilitation, but I'll always remember that day. There were great activities, teachable moments, and an excellent debriefing after the event. It was pure magic.

And what will I take away from these two peak experiences? Well, from my limited data set, always lead teambuilding programs on a Wednesday; that much is certain. Always believe you can make a difference. Always try to do your best, and remember that, even when things go wrong, which they will from time to time, a good facilitator can turn even that into a positive experience.

A Call To Action

So, get out there, make mistakes, practice, get better, and here's hoping you have a best virtual-facilitation day soon.

Who knows if or when we'll be presented with another situation like this one? Perhaps not in our lifetime. So, take this time, catch your breath, re-imagine yourself and the great things you do, and get ready to create the future of your own design. Good luck. Godspeed, and remember that facilitators will be needed now more than ever as the world recovers and attempts to re-connect. Our comeback is going to be greater than our setback I believe it in my heart. **ca**

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This article, and many more, are part of the book, *The Learning Curve—The Transition from Facilitating in the Real World to Facilitating in a Virtual One*, from the American Camping Association bookstore.