Institute for Healthcare Improvement

13 Steps to Running an Effective, Engaging Virtual Event

Editor's Note: This brief guide is intended to create some standard, time-tested best practices for virtual education. Its goal is not to curb creativity or innovation; rather, the aim is to provide support and guidance so that we can all deliver consistent, world-class learning experiences.

<u>Before the Event</u>

1. **Start with a design meeting — just like you would for an in-person event:**
   - Bring together all key stakeholders.
   - Develop thoughtful, action-oriented, and purpose-driven learning objectives.
   - Develop a clear agenda, including well-timed breaks (suggest at least one per hour, consider time zones) for longer events.
   - Match the agenda with clear roles, including presenters, facilitators, technical hosts, chat monitors, timekeepers, and note-takers.
   - Determine ground rules and norms for the event.
   - Capture next steps and action items — like all good meetings should.

2. **Design engaging content:**
   - Create slides that are heavy on visuals and light on text. (Limit yourself to no more than 12 words per slide or font size 26 or greater.) Avoid using your slides as "cue cards" to read off; include your talking points in the PPT notes section, or in a notebook for reference. Keep the total number of slides low.
   - Keep in mind technology limitations: For example, Webex does not support animations or transitions within PowerPoint slide presentations.
   - Minimize presentations in favor of discussion. (We hear over and over from participants that they want more interaction; think "guide on the side" instead of "sage on the stage.")
   - Prepare presenters for the type of experience you want to offer attendees. For example, if you're concerned about a presentation being dry or technical, design the session as a Q&A with the presenter and an engaging facilitator.

3. **Prepare attendees:**
   - Share meeting objectives, an agenda, speaker and attendee bios, and any relevant pre-work that will help attendees come ready to contribute to the discussion a few days in advance.
   - Line up attendees in advance who will share examples of their work — for example, through a storyboard slide template.
   - Consider "planting" attendees in the call to model the behavior you're seeking, like active contributions to the conversation or in the chat.
   - Provide attendees with guidance on engaging in virtual meetings (such as how to minimize distractions in the virtual space) and inform them of any technical or logistical needs (i.e. downloading WebEx ahead of time, testing audio if necessary.)
   - Encourage attendees to set expectations within their colleagues and teams of their full participation in the event. For example, for longer meetings, attendees can try the "50 Mile Rule:" "You should not interrupt me for anything that you would not try to reach me for if I were 50 miles away."

4. **Master the technology:**
   - Share clear instructions with presenters and attendees on how to connect to the session in the calendar invitation. Consider adding connection information to other core documents such as the meeting agenda.
   - Host a test call to familiarize presenters with platform features — logging in, connecting with audio and video, advancing slides, typing into chat, and managing a poll.
   - Share a "contingency plan" for presenters and attendees describing what to do if they run into issues like getting disconnected or losing audio.

5. **Design back-up plans:**
   - Identify a back-up technical host. (If you are using Webex, the person who launched the call can share the event host key with team members. This allows another person to assume the host role without requiring the original host to grant that permission. This saves a lot of heartache if Webex freezes and the original host cannot navigate the screen.)
   - Have a back-up audio line available. (For example, ask presenters to have their cell phones nearby in case they lose their connection and need to call back in.)
   - Consider asking presenters to have a second computer running simultaneously in case their computer crashes.
   - Consider asking presenters to print their slides in case they need to call in over the phone and refer to hard copy when asking technical host to advance the slides.
   - Ask presenters to share cell phone numbers so they can be reached in case of issues.

<u>During the Event</u>

1. **Create an ideal call environment:**
   - Begin the call 15-20 minutes early to manage call settings and check audio and video settings.
   - Ensure all speakers are in a quiet place and request that presenters use headsets (rather than their computer or phone speakers). Ask presenters and speakers to join the call at least 10 minutes for a final sound check.
   - Consider having those in technical host and "chat miner" roles sit in a different room from lead facilitators and presenters so they can collaborate out loud in real time while sparing the presenter distractions.

2. **Don't forget basic needs:**
   - Suggest that speakers have water handy during the call.
   - Plan for plentiful breaks to allow attendees to step away from their screens — including an extended lunch break if it's an all-day meeting. Clearly communicate the time at which attendees should return and reconvene after breaks. Consider displaying the start time on a slide or share on the screen a Google Timer for a visual countdown. Give a 2- or 5-minute warning over audio, as well, in case attendees have minimized the presentation window.
   - During sessions, invite attendees to stand and stretch or take a moment for a mindfulness exercise.

3. **Make it personal:**
   - Ask attendees to sign in with their full names and introduce themselves at the outset with their roles and organizations.
   - Build in time at the beginning of the call to build relationships with a check-in or icebreaker. If the group is small enough, attendees can share an introductory slide with a photo, quick biography, and personal details or fun facts.
   - Turn on video and ensure that faces are visible (with the camera in line with their eyes).
   - Call on attendees by name.

4. **Make the presentation dynamic:**
   - Strive for a conversational tone.
   - Prepare talking points but avoid reading directly from the notes or from the slides.
   - Stick with the 8-minute rule: Every eight minutes, stop to share a reflection question, take questions from the chat, administer a poll, or otherwise interact with the attendees.

5. **Encourage participation:**
   - Open sessions 15-20 minutes in advance to allow people to settle in and connect and leave the sessions open for 10-15 minutes after the presentation ends so conversations can continue.
   - Set expectations for participation: Design working agreements or norms with attendees so they feel a sense of ownership over the session.
   - Consider asking attendees to use a phrase like “That’s all from me” or “I am complete” when finished speaking on the call to prevent others from interrupting; help the facilitator know when to move to the next attendee.
   - Include a slide reminding people that multitasking is a myth and to invite them to lend their undivided attention as much as possible.
   - Consider introducing the expectation of “cold calls” — i.e., calling on people even when they aren’t raising their hand
   - Introduce the idea of “jargon alerts” in which people can flag jargon and remind presenters to explain a term in simpler language.
   - Host a virtual “site visit” by inviting attendees to share images or videos of their workplace.
   - Play soccer and not ping-pong in your session. In other words, don’t keep the conversation and teaching between one presenter and one attendee like a game of ping-pong. Instead, spread the conversation around to as many attendees as possible.
   - Make time for questions and answers throughout the session and at the end.

6. **Take advantage of the chat:**
   - Ask reflection questions and invite attendees to respond into the chat.
   - Leverage the team member acting as the “chat monitor/miner” to surface, summarize, and respond to themes and questions to encourage that engagement and make the session feel more like an exchange.
   - Remember that people need time to think and type, so get comfortable with silence. It can help to come up with a phrase like “Silence is the sound of us thinking” to invite attendees that they can embrace silence too.
   - Ask the team member acting as note-taker to share decisions, action items, or next steps in the chat, which can create a sense of accomplishment for attendees.

7. **Use other interactive features:**
    - Invite attendees to be playful and use emoticons to share their reactions to the content.
    - Ask attendees to indicate that they are stepping away for a break by displaying an emoticon like a coffee cup.
    - Do quick check-ins with attendees — for example, to ask if the content resonates or if they are ready to move to the next agenda item or need more time — by asking them to select a green check or red x mark or a thumbs up or thumbs down.
    - Use polls to engage attendees and capture real-time feedback.
    - Use the white board function to invite attendees to add their contributions to the conversation for all to see.
    - Use shared documents to brainstorm ideas in real time. Consider technology limitations especially when working with external faculty and customers — for example, Microsoft Teams may work well with internal teams but not be as easily accessible for attendees.

8. **Troubleshoot effectively:**
    - Set a norm at the outset of the call like “Good humor with inevitable technology hiccups” to refer to if things go awry.
    - Stay composed: Keep calm and take a deep breath if things go wrong.
    - Acknowledge issues and communicate instructions clearly with the attendees — and avoid over-apologizing. We’re all human!