



Improve your virtual strategy meetings

How to design and host high-value virtual sessions

Your Hosts



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Practicing what we preach: Always start by defining your goals

GOALS

01 Provide best practices for hosting a high-value virtual meeting or retreat

02 Share some simple tools and exercises to help virtual brainstorming and decision making

03 Answer your questions and hear your experiences—use the questions box to share with us!

ANTI-GOALS

01 Pass judgment on the best virtual meetings platform

02 Review how to use the interactive features of a virtual platform (the steps will vary)

03 Make things more complicated than they need to be—sometimes simple is better

Let's start with the good news

Believe it or not, there are many benefits to virtual versus in-person meetings

When done right, virtual meetings can...



Improve diversity of opinion

Virtual settings provide more room for quieter voices to share insights and ideas through annotation, facilitated discussion, chat box, voting, and quick polls

Elicit more honest answers

Attendees are often more comfortable sharing their honest opinions from behind a screen

Lower the barriers—and costs—to collaboration

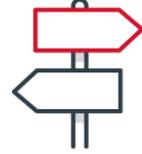
Reduces travel time and expense for attendees to join from different sites and functions

The hurdles are not insurmountable...

...It just takes a little adjustment and a lot of forward planning



**Common failure points
of virtual meetings**



Unclear goal, purpose, expectations



Virtual meeting fatigue



Technology issues



No interaction



Difficult to brainstorm, generate new ideas

Why do we have meetings anyway?

They may have gone virtual, but you can accomplish the same goals

A wide range of group interactions have gone virtual



- Board meeting
- Strategic planning retreat
- Executive leadership meeting
- Service line leadership meeting
- Operations or performance improvement committees

Common meeting goals

Where we usually limit our focus for virtual meetings

- ✓ Educate
- ✓ Share best practices
- ✓ Engage key stakeholders

What we can push our virtual meetings to help us do

- ✓ Collaboratively brainstorm solutions to a problem
- ✓ Develop a strategic or business plan
- ✓ Innovate
- ✓ Come to a decision
- ✓ Define accountability

Align the meeting format with your goals, virtual limitations

Meeting length, attendee list, may look different than for in-person sessions



If your goal is **education or networking...**

- Less taxing on participants
- Larger attendee list is okay
- Can have a longer session with multiple segments (4 hours)
- Break up the day with different topics, interaction



If your goal is to **collaboratively design solutions or build a plan...**

- Requires a fresh mind, engaged group
- Smaller groups are better (<15) to ensure everyone can participate and share relevant perspective; use breakout rooms if needed to keep groups small
- Keep session to 2 hours – consider hosting in two parts, e.g.,
 - Part I: identify the problems (1.5 hours)
 - Part II: Define, prioritize solutions (2 hours the next day)



If it's going to be a **contentious discussion...**

- Pre-wire attendees who may have pushback to hear concerns in advance, avoid unproductive rabbit holes
- Add in more breaks to ease the tension
- Keep to 2 hours or less

Craft a meeting agenda to avoid virtual fatigue



Build in more breaks than in-person; end on an action item (e.g., discussion prompt, quick poll) to help segue back into the discussion



More time for individual exercises than an in-person session, with structured report outs



Use breakout rooms strategically for agendas benefitting from multiple perspectives to design a solution



Timebox everything! Don't forget time for introductions, report outs, tallying votes, prioritization



Include interaction at least every **15 min**

Variety is the spice of life (and virtual discussions) – mix in didactic teaching, small interactive cues, and different exercises

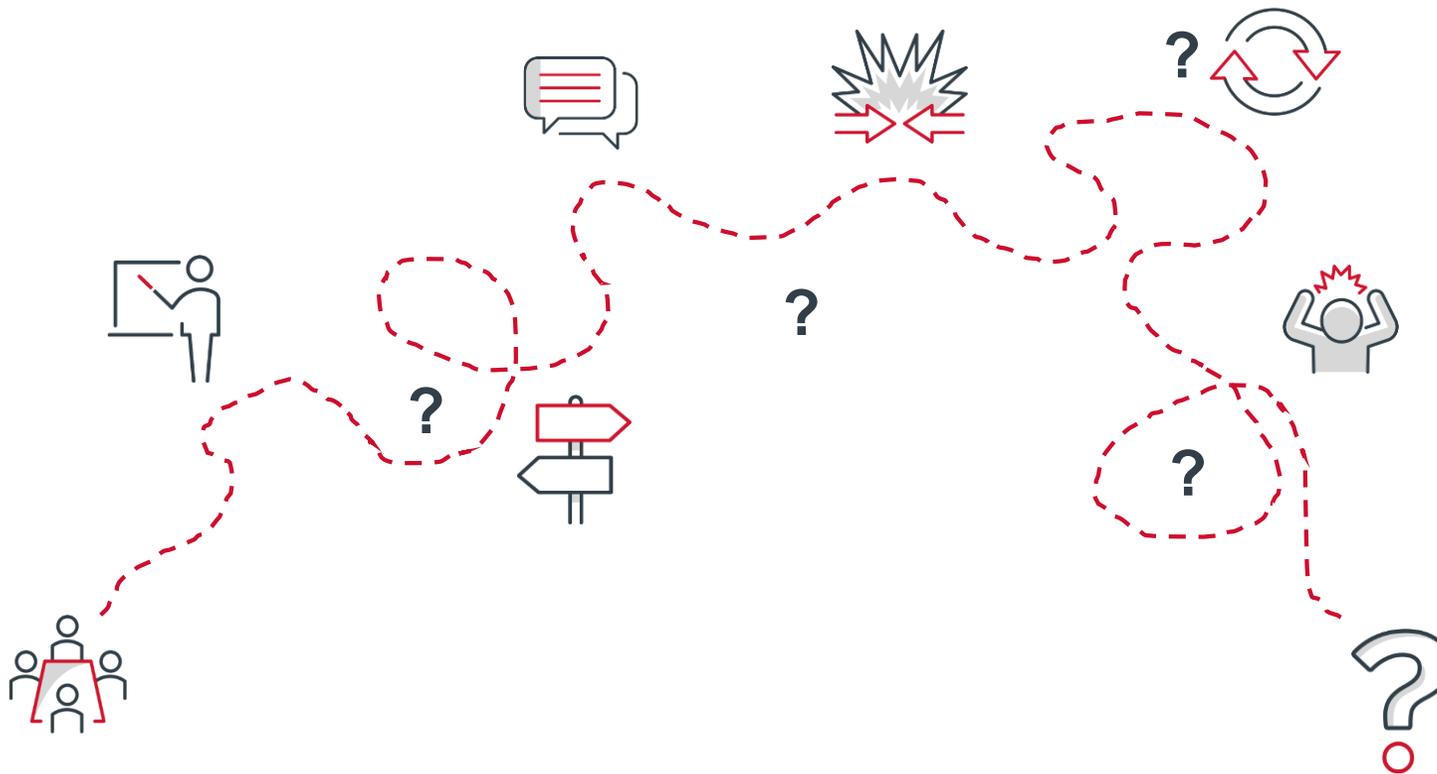
Timing hints:

- Avoid scheduling over lunch; 9-12, or 1-4 are ideal
- Schedule at neutral hours if different time zones (e.g., 1-4 ET)

It's not enough to have an agenda

Strong facilitation is even more critical in the virtual setting

Virtual meetings can quickly go off the rails



How to stay on track



Timebox everything—and stick to it!



Lean in to your role as a facilitator to move the conversation along



Have a co-facilitator assist with flow, timing



“Parking lot” off-topic items for later



Use the chat box for sidebar conversations

Don't let technology get in the way of a good meeting

Have your “tech support” plan—for you and for attendees



Ask everyone to use their own laptops, dial in separately, and share video



Ask a colleague to join to co-facilitate and provide tech support; give attendees their email



Schedule a dry run of the virtual platform with co-facilitators



Sign on early to get everything ready and have your back-up plan ready (e.g., share your slides with your co-facilitator)



Invite attendees to join 30 minutes early if they haven't used the platform before to work out technical difficulties



Send a prep email ~24 hours in advance with instructions and contact info if something goes awry

Build out your virtual toolbox

Simple tactics can encourage ongoing interaction



Chat

Particularly useful for large groups; ask a co-host to moderate the chat box



Annotation

Your virtual flip chart—get simultaneous input from a large group, encourage quieter voices to participate, easily vote



Polling

Quickly capture data and a read on the group, and re-engage; plan and create these in advance



Discussion prompts

Simple slides with discussion prompts visually signal Q&A



Individual exercises, group exercises in breakout rooms

Encourage hands-on participation to design solutions to problems, aligned to the goal of the meeting

A simple way to brainstorm virtually

Divergence enables new ideas, innovation

1

Divergence: Prompt individual reflection



- Incorporate prompts throughout the meeting related to the end goals:
 - “What are our biggest challenges to service line growth?”
 - “What initiatives could improve patient experience?”
- Give everyone 2-3 minutes to brainstorm

2

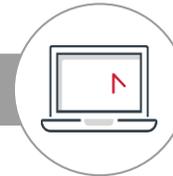
Do a “readout”



- Ask each person to share their best and/or most distinctive ideas via annotation or facilitated report-outs
- Consider requiring everyone to share
- Normalize sharing “bad” or unformed ideas—capture ideas without judgment

3

Convergence: Discuss, build upon ideas



- Display the group’s ideas where everyone can see them, such as on a virtual whiteboard
- Ask probing questions to learn more, gather additional input
- Invite others to build upon ideas

4

Vote (the right way!)



- Ask each person to checkmark or initial their favorite idea on the whiteboard
- Or, give everyone 10 “points” to split among their favorite ideas

Find a way to prioritize responses: Example 1 – Voting

Q: What service line growth tactics should we prioritize for 2021?

Physician liaisons for niche service offerings



Greater partnership between service line & marketing

Expanded hours for diagnostic clinic to improve access

Patient portal for self-scheduling online

Audit service offerings, decide new innovations

Pamphlet of all physicians, procedures they provide, across system

eConsults for referring physicians

Referring physician marketing material on new clinic with referral criteria

& patient-focused marketing, explain benefits to patients

Partner with payers to be part of narrow network/COE

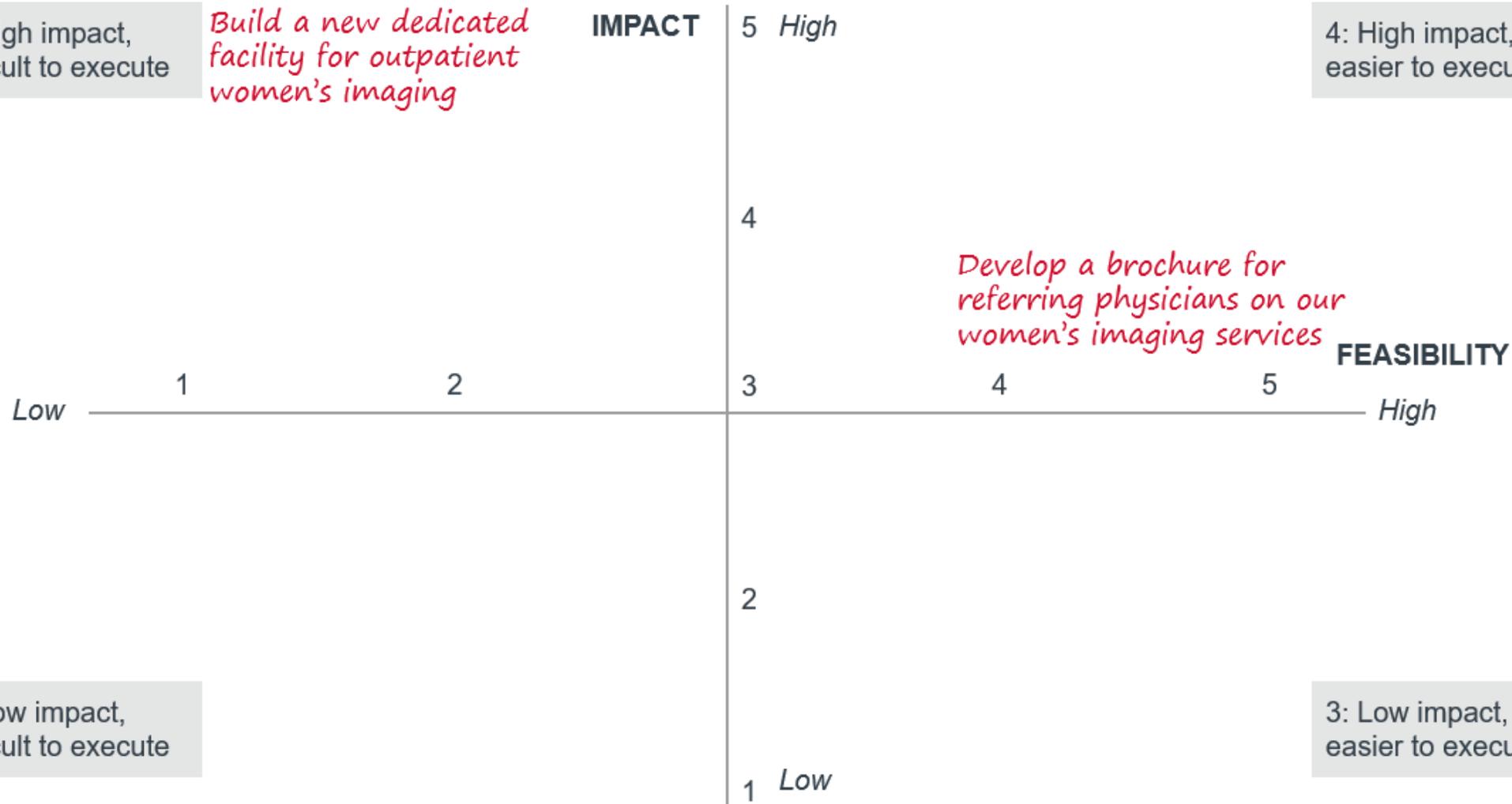
- Each attendee annotates their top idea on a whiteboard
- Everyone checks their favorite idea that is not their own

Example 2 – Impact vs. feasibility matrix

1: High impact, difficult to execute

Build a new dedicated facility for outpatient women's imaging

4: High impact, easier to execute



2: Low impact, difficult to execute

3: Low impact, easier to execute

Make the closing count

Leave attendees with a sense of value-add from the meeting, next steps

Ensure time for Q&A



- Depending on how didactic the session was, make sure there is time for participants to ask questions
- Make sure questions in the chat are answered

Ask attendees for their 'aha!' moment



- Ask each attendee to share something they learned from the session, such as:
 - One key takeaway
 - One thing they'll do differently
 - One action step they'll take immediately

Clearly define next steps from the session



- Ensure attendees know the value of time spent
- Consider completing an action plan on screen:
 - Next steps
 - Project lead
 - Project team
 - Goals
 - Timeline

Post-virtual meeting follow-up



- Share key takeaways from the session and next steps over email to attendees
- Proactively schedule time with other stakeholders to debrief on the session

Your cheat sheet for hosting a virtual meeting or retreat

Advisory Board

Best practices for hosting a virtual meeting or retreat

Keep attendees engaged and encourage participation

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- 1 | Ask all attendees to use their own laptops/computers and share their cameras to encourage collaboration and discussion.** This enables everyone to participate in chat or polling as well. Include this in the invite and the prep email to the group so they are prepared.
- 2 | Schedule a dry run of the virtual platform with co-facilitators.** Practice muting, using chat, sharing slides, and how you will document responses to discussion on the screen. Ask a colleague to join for technical support, and make sure attendees have their contact information.
- 3 | Put the goal—and any 'anti-goals'—of the meeting on a slide at the beginning of the discussion.** This way it is abundantly clear the purpose of the meeting, why it's so important for participation, and also what is out of scope. Make sure to tie this goal to something that the attendees will care about, and highlights the downstream implications of this discussion.
- 4 | Set a schedule and stick to it. Explain to the group your role as a facilitator to advance the conversation to adhere the schedule and goals.** If you have a clearly set agenda with timestamps, it gives you permission as host to cut off a discussion, or invite someone to speak who has not yet participated. Set this context at the beginning to gain permission from the group to move the conversation along as needed.
- 5 | Use chat to allow attendees to submit questions or comments without interruption.** As it can be difficult to 'raise your hand' in a virtual sense as in a live meeting, the chat allows attendees to ask a question or comment in the moment that the host can address at a pause, or others can answer in the chat box, without having to interrupt the flow of the conversation. This also is helpful for the softer voices in the room to have a chance to speak—which can be a very positive aspect of virtual over in-person meetings.
- 6 | Include prompts before and during the meeting that require an answer to encourage participation.** A few ideas:
 - Send an email in advance asking all attendees to answer one question related to the topic of the discussion, and be prepared to share their answer during introductions. For example, if the meeting is going to address a new policy that is up for review, ask everyone to be prepared to share one aspect of the new standard they are excited about, one aspect they are concerned about, and one question they would like to address in the meeting.
 - Pose a question of the group on the slide, and ask everyone to submit their response in the chat function so you can address with the group.
 - Use the poll function in your virtual platform to create a quick poll or two to use at a few stages in the meeting that is related to the topic at hand. This requires all attendees to reengage and participate in the discussion.

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Download the cheat sheet at advisory.com



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