

VIRTUAL COLLABORATION BEST PRACTICE

BACKUP PLANS

OBJECTIVE: You have backup strategies for any virtual meeting technology failure.

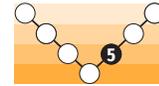
One of the most intimidating aspects of virtual facilitation is the dependency on technology for success. The more creative and visual your approaches are, the more likely you are to be using several different tools, any one of which could become unavailable, behave unexpectedly, or be uncooperative in front of the group you are trying to facilitate. There are two secrets to making this reality bearable. The first is simply to expect that something will go wrong at some point in every engagement. The second is to have a robust set of backup plans.

You have got to be kidding me. It was there this morning! Okay folks, looks like we're moving on to Plan B!



TIME
1 hour

Facilitation Model
Stage 5
Supporting Action



The purpose of backup planning is to make you feel more secure, not less. Think through everything that could go wrong and decide in advance what you will do when it does. You will be able to remain calm in the event that something does happen, which will have a calming effect on the participants and smooth the way to recovery.

Steps

1. Make a list of every tool you plan to use for your virtual meeting. Your chosen tools should support the desired outcomes for your meeting.
2. Choose a backup tool for each tool you have chosen. For example, if you have chosen to use an online sticky note board, consider a basic technology like browser-based, shared slides just in case.
3. For every activity that you prepare prior to your virtual meeting, make sure that you have each activity also set up in your backup technology. Most likely, your Plan B won't function as gracefully as Plan A, but you nevertheless can still achieve your meeting outcomes in a functional way. Again, if your Plan A involves an online sticky note tool that consists of two hours of activities, recreate those activities in a set of slides.
4. Consider a Plan C that doesn't require participants to log in to any technology besides a web conference application. You can still run a visual virtual meeting with screen sharing, it just may not be as interactive as you had planned!

Tips

- Tech support is a critical consideration in virtual meetings. In the best case, you will have one person facilitating the process, and another person supporting the technology. Co-facilitating is also a great backup strategy. If one facilitator has technical difficulty, then the other facilitator can take over.
 - The most basic backup plan is to abandon the visual meeting and simply have a phone-supported audio conference. Have the number ready to send (or send it beforehand as an emergency backup) in case of drastic technology failure.
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