

LEAN lifestyle

Let's Get Virtual

by Julie Finnegan

Wow- has it really been 8 weeks? I don't know if this time is going by incredibly fast or incredibly slow for you, but I woke up today and it hit me that we have been working from home for 2 months. This mostly shocking realization prompted me to take a minute to think about where we started and reflect on whether or not I have truly changed the way I accomplish work. After a few minutes of thought I can confidently say our LeanOhio team has definitely evolved and we are now hitting stride with what I am calling phase two of our work from home reality.

Phase Two? What was Phase One?

As we settle into the next phase of our new normal, I feel like a transition is happening with the way we work, and are expected to work moving forward. We have had the past 8 weeks to learn, adapt, and accept the new ways with which we need to continue to conduct business, but now that transitional period of change is moving away and we need to build a solid routine that we can rely on.

I didn't realize this was happening until a lot of people within our network started asking the same question: "How are you guys offering virtual training and helping agencies facilitate projects?" At first, we started talking about our plan, our offerings, and what we see as the way LeanOhio can continue to assist everyone. However, these conversations quickly turned into a discussion about the trainings we have been taking, the best practices we are absorbing, and the lessons learned from trainings we have been hosting.

What's Working for Us

Reflecting on these conversation, and in an effort to reduce the amount of times we are repeating the same concepts to different people, we wanted to put out our version of a "so you need to hold a virtual meeting/training" best practices list. These represent a framework that currently works for LeanOhio and can vary depending on the activity.

- **Use a Moderator** – Partner up with a coworker and use them as your Moderator. As a Facilitator, it is difficult to focus on the chat box and address individual needs during a session. The Moderator is someone who can handle pre- and post- emails to the group, set up surveys, post important links or information in time with the topic discussed, answer tech or quick questions in the chat box, and help you address larger topics where the questions reveal the

need. Make sure you have a pre-meeting with your Moderator to discuss how to handle questions and interruptions so you are both on the same page.

- **Send a pre-event email** – Prior to the training or meeting, be sure to send an email to the group. Use this to explain the ground rules, expectations, general housekeeping items, software downloads and provide media links that will be used during the training. This is also a great way to identify any related pre-work that would help the meeting or training go quicker and smoother.
- **Keep it Short** – Studies have shown people start to lose interest quickly, and much faster online versus in person. Keep your event to an hour, if possible, but make sure you block off enough time. If you reserve an hour and a half but finish early, people will be happier than if you scheduled one hour and take an hour and a half. Even if you need 2, 3, 4 hours to fully discuss the topic, it is best to break it up into 1-hour meetings. Take smaller bites out of your agenda; it will be more effective than trying to push through the fatigue.
- **Agenda** - Just like face-to-face meetings, virtual meetings/trainings need agendas. Agendas should be sent out in advance of hosting the meeting/training so attendees can check it out before you start. The host can also use the screen-sharing feature to show the agenda all/part of the time during the meeting.
- **Follow-up Survey** – As Lean Practitioners we strive for continuous improvement, and we cannot work towards that goal without getting feedback from our customers about what is working well and what we need to improve upon. Because we are relatively new to this method for training delivery and facilitation, our team has found survey results to be informative and drive many value added improvements to our methodology.

Anything You Can Do I Can Do Better

Naturally, the list is incomplete and ever-evolving. As you read through our hints, tips, and tricks we hope you found some to be new and insightful, and maybe gave you an “aha” moment. But we also want to hear from you. What are you doing to make your meetings and/or trainings successful? As we teach in Boot Camp, everyone does Lean differently. By that logic, everyone will teach differently, everyone will host a meeting differently, everyone has a unique circumstance that they have had to adapt to. [Please tell us](#) what you’re doing so we can not only learn from you, but share your experiences with the network. Additionally, if you want us to elaborate on any of the above, feel free to [reach out!](#)