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Remote workshop tools and best practices



Why we are here today?

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Introduction

COVID-19 comes with unique challenges, including the need for employees to shift to meeting virtually, supporting business continuity while still ensuring health and well-being.

Best practices

This document outlines best practices and considerations to be familiar with, when conducting virtual meetings or workshops

Do's and Don'ts

Within this document you will find tips for maximizing the effectiveness of virtual meetings, including Do's and Don'ts as well as example workshop energizers and ice breakers

Tools and platforms

Finally, we outline the possible tools and platforms to accommodate your needs in different situations depending on your available applications and infrastructure

A close-up, high-angle shot of a person's hands typing on a silver laptop keyboard. The person is wearing a white, long-sleeved button-down shirt. The laptop is open on a dark wooden desk. In the background, there are some blurred office items like a smartphone and a notebook. The lighting is warm and soft, suggesting an indoor office environment.

Tips for remote workers

Top ten tips for remote workers

General tips to ensure you and your teams are well setup for remote working

- 1** Designate a workspace for focus in your home
- 2** Develop a daily routine
- 3** Embrace technology tools for collaboration
- 4** Communicate frequently with your team
- 5** Communicate openly
- 6** Remain contactable
- 7** Do not over-rely on email/instant messaging – use the phone
- 8** Block your calendar for “working time”
- 9** Dedicate time for informal social interactions
- 10** Regularly review performance with team leader

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General rules for virtual meetings

Tips for a productive virtual meeting

General tips to ensure your virtual meetings run smoothly, both for facilitators and participants

Behaviour

- **Be on time** to each meeting
- **Join early**, to ensure all new platforms have the right access to your camera, microphone. Some tools might require downloads
- Treat the virtual meeting as a **co-located meeting**
- **Be more vocal**, if you agree or disagree, say so out loud

Personal well-being

- Set yourself up in a **well aired and bright room**
- **Minimise distractions** by ensuring your workplace is quiet and undisrupted
- Make you and your surroundings **presentable**
- Keep some (healthy) **snacks** close, to replenish your energy and make sure you stay hydrated

Technology requirements

- Make sure you have a fast and stable **internet connection**
- Have a decent **webcam** setup and test the lighting of your video (remove the sticker you may have that is blocking your laptop webcam)
- Test your **microphone** and **speakers**
- **Face the camera**. Look engaged. Eye contact matters
- **Speak up and clearly**, especially if you are experiencing issues



**Collaboration
session with your
project team**

Possible collaboration sessions with your team

The following use cases cover what our experience has been in setting up conference calls, creating best-in class remote workshops and high class virtual presentations

Video conference calls

A live video call between individuals or within a team, used as a way to connect and talk through a presentation or other forms of documents.

Video / Conference calls

Sharing of desktop

Sharing of mobile screen

Workshop & interactive sessions

Complete virtual / web based workshop experience in the comfort of your own home or office. The audience will be able to see the presenter, ask questions, see the PowerPoint and interact on a digital whiteboard.

Video / Conference calls

Virtual Whiteboards

Kanban boards

Timers

Document storage

Breakout rooms

Polling

Virtual presentation

A formal presentation that takes place via a live video call, involves multiple people and requires some facilitation.

Video / Conference calls

Sharing of desktop

Presenting PowerPoint file

Video conference calls

A list of Do's and Don'ts for facilitators



Join early

- Make sure you have the appropriate tools, plugins and logins for the app being used
- If you're the host, test audio/visual 10mins before the start

Use an agenda

- Use an agenda, either in your presentation or the meeting invite to keep the meeting focused

Face the camera

- Look engaged and make eye contact
- Speak up and clearly

Engage participants

- From time to time, check the list of participants to make sure everybody is still dialled in



Don't stay silent

- If you agree, you need to say so
- If you are having technical or other issues, speak up

Minimise distractions

- Don't setup your workspace or meeting room in a noisy distracting space

Workshops and other interactive sessions

A list of Do's and Don'ts for facilitators



Prepare, prepare, prepare

- It can take 3-5 times more preparation than a co-located workshop
- Do Dry-Runs with the team before the virtual workshop. Dry-runs can be made fun and/ or simulate a real workshop situation
- Have an Subject Matter Expert, a dedicated Facilitator, and a Scribe

Reserve more time than you normally would

- Set the right expectations around the time and effort required by all attendees. The first few hours might be presentation heavy to get everyone aligned.

Communicate as much as possible

- Show who is in the "room" and agenda on a slide at the beginning
- Create chat rooms/ WhatsApp groups with your internal team, leadership, and workshop participants
- Send mails with relevant links & agenda before each session
- Ask if anyone is experiencing any issues before starting a session

Be articulate and clear on tasks/ objectives

When assigning a task to be worked on be very clear and articulate on:

- What the task is
- How to execute it
- Who is accountable for it
- What is the expected outcome
- How much time is allocated for it

Keep track of who speaks and who doesn't

If you notice that some participants haven't spoken, call them out and ask their opinion. Send a chat message in private to the loudest voices asking them to allow others to speak

Have retrospectives at the end of the day

In a simple whiteboard exercise, ask participants what to continue, start, stop doing in terms of content and facilitation

Workshops and other interactive sessions

A list of Do's and Don'ts for facilitators



Don't exceed 4.5 hours a day for Workshops

Virtual workshops are more tiring than co-located ones. Keep a single day of workshop time to 3-4.5 hours, span across multiple days instead of having a full day virtual workshop:

- Recommended workshop duration is 2–4.5 hours
- Ensure short working times with frequent breaks e.g., 30-45min work + 10-15min break

Don't sit too long

Sitting in front of the camera and screen for too long is tiring and unhealthy, factor in energizers that get people moving e.g. dancing the YMCA, Macarena, 'copy the dance move'; MTV Cribs style show us your environment; Pick-up the most interesting thing in the room. For more see section on [Energizer and Ice Breakers](#)

Don't allow Rabbit-Hole discussions

Assign a Rabbit-Hole guardian or decide a safe word e.g., Potato to indicate that the group is in a Rabbit-Hole, share a specific emoji in the chat

Don't be boring

It is no easy feat to pull off an engaging virtual workshop but it is possible with a few tricks:

- Keep it light by using light visuals, content, and templates
- Play music while waiting for people to join (ask for song requests)
- Send funny GIFs in chat rooms when reminding time or which call link to join next

Don't rely that everyone is on the same page

- Plan more time for recalibration and wrap ups
- Have a slide explaining what is expected of participants or what you are about to do. Make sure participants have access to all material presented to them on a document storage platform e.g., SharePoint, Google Drive
- Repeat task explanations a few times, ask participants (cold call) to repeat what needs to be done

Don't allow negativity

- Assume positive intent to help with any potential misunderstandings

Virtual Presentation

A list of Do's for facilitators – please also consider the Do's and Don'ts for Video conference calls



Master the technology well in advance

- Confirm technology platform with audience, test the tool to ensure all features work for all presenters well in advance
- If you're demoing a tool, record your walkthrough of the tool vs doing it live on the call to avoid any potential IT issues, have the tool live and ready to answer any questions

Rehearse, rehearse, rehearse!

- Prepare a script and a rehearsal schedule, plan a day of rehearsal per hour of presentation (e.g., a two-hour presentation needs a two-day rehearsal)
- Record and review your rehearsals to see where you can improve

Quarterback regularly during the online meeting

- Appoint a senior and knowledgeable member of the team to chair the contribution, assign in advance who will answer questions depending on the topic, allocate clear speaker roles in the agenda

Consider additional tools to support

- Identify interactive features where possible (polling, whiteboarding, demos etc.) to elevate the presentation's experience



Don't create busy slides

- Build simple slides with less text - the focus will be on the speakers
- Inject your key messages early and often and close with the same key points
- Avoid putting content on the right side of slides to avoid risk of it being covered by thumbnails in the video conferencing tool

Avoid long slots for presenters
























- Allocate no more than five minutes at a time per presenter - audiences begin to lose attention after roughly 5 minutes of hearing from the same presenter and after 2 minutes of seeing the same slide



**Tools and
supporting
material**








Potential Tools

The below list of tools and potential alternatives have proved to work very well when running effective virtual workshops, please click on each tools' link to access "Getting Started" tutorial material

	MICROSOFT OFFICE SUITE	GOOGLE SUITE	ALTERNATIVES
TOOL TYPES	Document Storage  Sharepoint Online  File Storage	 Google Drive	 Dropbox
	Video / Conference calls & Webinars  Skype for Business  Video Conferencing	 Google Hangouts	 Zoom   Cisco Webex
	Digital Whiteboards  Microsoft Whiteboard	 Google Jamboard	 Mural  Miro
	Kanban boards  Microsoft Planner	 Can use Google Jamboard as a post-it Kanban Board without fancy features	 Trello  Jira
	Polling  Polling	 Google Forms	 Sli.do  Mentimeter
	Timers N/A	N/A	 Cuckoo Timer

Disclaimer: The above listed tools are purely examples of market offerings. Deloitte Consulting AG takes no responsibilities for the selection and usage of any tool. The hyperlinks provided in the above slide relate to content that is not under control of Deloitte Consulting AG. Please check with your Company policies before adopting and using any tool.

Unique tips and tricks for different meeting sizes

	2-5 People	6-25 people	25+ people				
Ground Rules and Roles	<ul style="list-style-type: none"> Assign one person to look after the agenda, time and manage “Rabbit-hole” situations Assign one person to scribe and ensure everyone knows who it is on the call 	<ul style="list-style-type: none"> Assign a “timekeeper” and a “Rabbit-hole” referee All participants to be muted whilst not speaking and if in a crowded place 	<ul style="list-style-type: none"> Agree a chairman who is ultimately responsible for managing the meeting Mute everyone and set up the ability to receive questions (e.g., through chat, Mentimeter) 				
Keeping Momentum	<ul style="list-style-type: none"> Keep the meeting as short as possible We see that 50mins of concentration followed by a 10mins break works well 	<ul style="list-style-type: none"> Divide the group up into smaller groups; Zoom is good for doing this Surprise people with polls and ice breakers 	<ul style="list-style-type: none"> Keep content visual Create lots of slides, animate bullets and don’t stay on one thing too long; this will really help keep the audience engaged 				
Maximizing Contribution	<ul style="list-style-type: none"> Use a whiteboard software and have one person manage the single board Turn video on! Circulate notes and actions immediately after the meeting 	<ul style="list-style-type: none"> Use a whiteboard software; try to use a single board. Set challenges and use timers to keep everyone concentrated If a topic is sensitive or high stakes, anonymity might be important to maintain team harmony 	<ul style="list-style-type: none"> In most instances, use evaluative tools such as Mentimeter and Google polls. Try to avoid whiteboarding unless you have enough facilitators to manage each board. 				
Possible tools	 <p>Video calls, Chat, 2-50 people</p>	 <p>Video calls, Chat, 2-50 people</p>	 <p>Video, Chat, 2-25 people</p>	 <p>Video, Chat, stores history 2-100 people</p>	 <p>Video, Chat, Seamless call division and merging, 2-100 people</p>	 <p>Video, running conferences and webinars, 100+ people</p>	 <p>Video, running conferences, 100+ people</p>

Example Energizers and Ice Breakers

A collection of energizers and ice breakers you may use for virtual meetings

Energizer/ Ice Breaker	Description	Benefits / Key Message
Playing the numbers	<p>Here's a quick exercise you can use after lunch or a break.</p> <p>Place these numbers on a flipchart or whiteboard: Tell the participants, "You're seeing all the numbers from 1 to 15 with the exception of 4 and 9. Your task is to decide why the numbers are arranged in this sequence, then put the missing numbers in their proper places." 8, 11, 15, 5, 14, 1, 7, 6, 10, 13, 3, 12, 2</p> <p>Solution: The numbers are listed alphabetically. Therefore, 4 goes after 5 and 9 follows 14</p>	<p>Benefit: This activity helps you to engage participants in a creative exercise after a break/ lunch</p> <p>Key Message: Knowledge does not equal Understanding. We all know the numbers, but do we understand the sequence?</p>
Magnificent flying machines	<p>Give each participant a single sheet of paper and ask them to make a plane that flies. Each person will more than likely be successful and also be able to demonstrate for others having problems. Next ask that they use a fresh sheet of paper to create a new flying machine. Allow them the same amount of time to look for an entirely new design – a revolutionary new airborne machine that must fly. In all likelihood, very few will succeed. Most will build upon or slightly alter the conventional design.</p> <p>Solution: When all have finished, take a piece of paper, crush it into a ball, and throw it across the room.</p>	<p>Benefit: Challenge participants' ability to think creatively.</p> <p>Key Message: Thinking out-of-the-box, differently, creatively. Sometimes the most simple solution is the most effective.</p>
Dancing in front of the camera	<p>Best used in the middle of the workshop after having sat for 2hours. Introduce the exercise as an "exclusive gym session for members only", ask everyone to stand-up, on YouTube or Spotify play a tune everyone knows how to dance to e.g. YMCA, Macarena, We Will Rock You etc. Dance together with the group in front of the camera, call out people who aren't dancing and ask them to join, it takes max 3min</p>	<p>Benefit: the feeling of doing something funny and ridiculous together as a group creates a bond in the group that helps the virtual meeting flow + gets people moving around for a while</p>
Copy the dance move	<p>Before starting a working session, turn on the music and ask participant A to do a dance move and to then call out participant B. Participant B repeats the dance move and adds another one. He then calls out participant C. Participant C repeats participant B's dance move and adds another one. Etc.</p>	<p>Benefit: You'll get people moving and paying attention to the other participants</p>
Touch Blue	<p>Best used in the middle of the workshop after having sat for 2hours. Ask everyone to stand-up, then call out tasks such as "Touch something blue / red / fluffy / cold...". You can mix it up with "With your left hand touch blue, and with your right foot touch brown". Do this for a few iterations so that people move around their room/house/office. Ask people to come up with the next challenge by saying a colour/ texture</p>	<p>Benefit: gets people moving around for a while</p>
MTV Cribs	<p>Can be used as an icebreaker or energizer. Show us your environment (house or office) in 2min. People need to show at least 2 rooms. Make sure everyone is comfortable doing this, different cultures have different sensitivities to display their households</p>	<p>Benefit: allows the team to bond by getting to know each other via their environment + gets people moving around</p>
Two truths and a lie!	<p>Ask each person to think of three statements that tell the group something about themselves, two that are true and one that is false. Take turns in the group sharing the three statements and have the rest of the group vote on which one they think is false. The more subtle ones are trickier! Note that making a fictional statement is not the same as telling lies. Everyone knew that one statement was deliberately intended to be either factual or fictional, and the participant simply deferred revealing the category until after the game</p>	<p>Benefit: allows the team to bond by getting to know each other</p>

Example slide for breakout rooms

If your Video Conferencing tool does not have the Breakout Room functionality, you can use a similar slide to communicate what links the teams will be using and who will be expected to be in each room

Team 1&2 Plenary – [Link](#)
Phone: +41 ...; PIN: #

Team 1 Main Room – [Link](#)
Phone: +41 ...; PIN: #

Team 2 Main Room – [Link](#)
Phone: +41 ...; PIN: #

[TOPIC] Team 1 Alpha Room – [Link](#)
Phone: +41.. PIN: #

[TOPIC] Team 1 Beta Room – [Link](#)
Phone: +41.. PIN: #

[TOPIC] Team 2 Room 1 – [Link](#)
Phone: +41 ...
PIN: #

[TOPIC] Team 2 Room 2 – [Link](#)
Phone: +41 ...
PIN: #

- Ensure that the workshop participants are crystal clear on which link to click on with this overview slide
- Communicate over the chat rooms when it is time to join a different room to gather people back in plenary when they are all in individual breakout rooms. It also helps to send a mail containing all the relevant links in a table for that day of the workshop:

Item	Access Link
Team 1&2 Plenary	[Link to VCI]
Team 1 Main Room – Video Conference Link	[Link to VCI]
Team 1 Alpha Room – [TOPIC] – Video Conference Link	[Link to VCI]
Team 1 Beta Room – [TOPIC] – Video Conference Link	[Link to VCI]
Document Storage Folder for the day/workshop	[Link to Doc Storage folder]
Cuckoo Clock	[Link to timer for the session]
Chat Room for Team 1	[Link to Chat Room]
Video Conference Link Overview slide	[Link to VC link overview slide]
Digital Whiteboard for the day	[Link to Whiteboard]



- Ask your team to bookmark useful links (breakout rooms, tools, platforms)
- Ask participants to open a new browser window

Other useful tools to consider



Miranda helps you visually find the best time to schedule international meetings and calls across different time zones



Use QuickTime Player to mirror your smartphone screen on your computer



**Looking for
support?**

Looking for support on your first virtual session?

If you are looking for support or would like further information regarding remote working, please reach out to our experienced team at Deloitte



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