



Tips for Facilitating Virtual Peer Coaching Meetings

The following tips will be useful when conducting virtual trainings or meetings with peer coaching group (e.g., “Circle”) members, whether externally facilitated or self-facilitated. Discuss and share these tips with members early in the peer coaching group program. Encourage them to have the tips in front of them during group activities.

Orienting Participants – Mention:

Virtual has its challenges, but advantages:

- Saves much time and money
 - Is better than typical open discussion format
 - Some participate better if not face-to-face
- Don't judge the experience from first meeting

Building Team / Relationships

Meet face-to-face early in Circles program?
Share biographies, resumes and pictures on private Web space, e.g., a SharePoint
Share coaching goals, coaching tips and reminders between meetings

Planning / Preparing Technology

Communications:

Real-time video is not that important
Consider a headset so not holding a phone?
For speaker/ear phones, use mute to stop background noise and keep confidentiality
Don't use “Hold” buttons if they play music
Avoid cordless phones – often make static
If phone bridge, remember rented time expires; shared conference numbers might be scheduled again to get more time
Turn up volume – better to be loud, than soft
Be sure batteries are charged beforehand
Call in early to verify technology is working

Materials (e.g., if doing a training):

Upload any needed materials before meeting
Verify access to materials before the meeting
During Kickoff, turn chairs around – practice communicating without seeing each other

Additional Circle ground rules?

Don't talk to non-members during the Circle
Confidentiality – be in private area where no one else can hear what's said
Avoid paper and keyboard noise?

Consistency in Agenda and Roles

Agenda – Stick to Circles agenda so members always know where at during meeting
Roles – Stick to the Circles roles so members always know what's expected of them
Breaks – Build in 5/10-minute breaks at least every 1.5 hours
Check-in – Do so each member involved early
Time slots – Make each time slot equal in length so members don't get disoriented

At Start of Meeting

Verify that they can hear you – loud enough?
Do roll call to identify all members present
Make a list of those in attendance
Ask them to mute their phone, turn volume up

Ensuring Focus and Attention

Name slides as you move among them
Name parts of the agenda that you're on
When offering coaching – say your name first
Presenter addresses one question/advice at a time, before addressing other members

Tracking Participation

Reference attendance list – who's talking?
Call on quiet people
During time slot, ask if it's helpful
If person speaks for several minutes, tactfully interrupt, “Is Circle process still being helpful to all of you?”
Vary the inflection and tone of your voice?

Tracking Attendance

Do roll call every hour – ask each person to indicate they are present
When checking in, mention your name until other members acknowledge you
When checking out, mention your departure and be sure another member acknowledges you