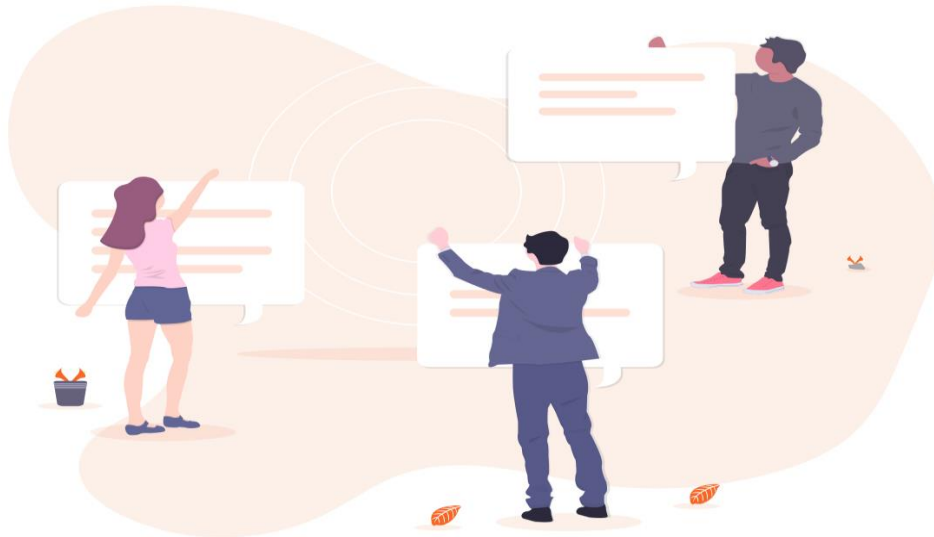


# Virtual Planning Do's and Don'ts



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“To borrow Nike’s call to action, “Just Do It”. Some associations tell me they want to hold off their planning until they can convene face-to-face in a traditional meeting room for a workshop that lasts a day or longer...Predictions aside on when crowds will be back in hotel meeting rooms, the compelling reasons to have and follow a current plan are even more acute today than ever before.”

Many organizations create strategic plans to cover a three-year horizon and if that is a fair premise, one-third are due to update their plans in the coming months. That estimated number may be higher due to COVID 19 as existing plans are recalibrated and prudent leaders develop an inventory of decisions and strategic responses for the shorter-term scenarios they face.

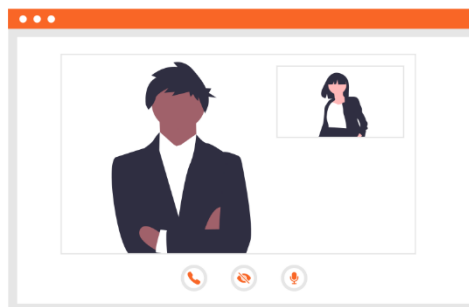
For most, the development of those plans will occur virtually through platforms such as Zoom or WebEx. As virtual meeting participants have discovered, especially since early March 2020, achieving a highly productive result through on-line meetings is challenging. During on-line sessions people multi-task; may be distracted with interruptions; or, become fatigued by being on camera and having to be visually “on”.

I have been involved facilitating many strategic planning workshops over the years and a good number of virtual sessions for associations this year. Here are some observations on **the do's and don'ts of virtual planning**. By no means is it a complete list given this is an area of growing experience for all of us.

There is one overarching call to action that is a bonus "To Do". To borrow Nike's call to action, "Just Do It". Some associations tell me they want to hold off their planning until they can convene face-to-face in a traditional meeting room for a workshop that lasts a day or longer. Other organizations have expressed the view that there is no need to plan right now because they'll "just keep doing what we do best."

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I used this analogy with a client: The organization is like the patient with a host of health-related issues and wellness outcomes that when managed lead to many fulfilling years of life ahead. There is a plan to deal with these issues such as daily medications, diet and exercise, and possibly scheduled referrals to specialists. But today the patient finds themselves in the Emergency Room with an unexpected and life-threatening condition. You are the health care team that must save the patient, dealing with the most critical issues first, while considering the implications of today's actions over the longer term.



## The Do's of Virtual Planning

1. **Keep It Short:** Prior to the pandemic, most would have agreed that it is difficult to create a plan in less than a day. Thus the day-long (or multi day) retreat to a resort for strategic planning. In a virtual approach, it's very important to divide the planning agenda into manageable sessions of 2-3 hours. This means there must be a commitment by participants to convene several times to complete the plan. However, there is a bonus to an extended process as people reflect on their work and have time to strengthen the plan between sessions.
2. **Manageable Numbers:** Even with breakout rooms and tools (e.g., hand raising and polls) in a virtual meeting platform, it is my experience that the most productive sessions have smaller numbers. I've been involved with virtual planning workshops with approximately 40 participants and others with under 20. Fewer is better. Politically, some organizations will have no choice but to engage a large constituency in the process. But there are other and better ways to engage stakeholders in planning than to have a large crowd on-line. See item 4 below for more on this.

3. **Break the Routine:** People are weary of virtual meetings particularly if they have a lot of back-to-back Zoom conferences. The prospect of hours facing a screen to do planning may not be enthusiastically embraced. It's up to the facilitator or meeting host to add some fun to the time - such as an ice-breaker to open; a variety of media and visuals to keep people interested; also ensuring that participants are active by doing most of the sharing of ideas and refining of work.

These meetings are a bit like staging a media production – there needs to be sizzle *and* substance. And always remember people very much want to connect – all the more if they are meeting with others online whom they don't know well and/or if they have been sequestered and miss human interaction.

4. **Creative Off-Line:** The creativity and high-level building of the plan should occur prior to the virtual workshops by having those responsible for the plan propose and develop the best ideas between sessions, in a collaborative project sharing platform. It's also an option to have a larger group participate in the non-Zoom work, such as the entire staff and not only senior management.

The planners/facilitators will then bring to the virtual workshops the most important priority issues for group discussion and decision; usually 'straw dog' options which have been generated and where consensus has gelled on the project collaboration platform. For example, a virtual workshop task might be: "Here are the four strategic priority candidates that have been developed by stakeholders leading up to the workshop; let's now refine and prioritize them, and start creating clear outcome goals for them."

5. **Connect The Dots:** An important lesson from doing generative work in a collaborative platform and proposing 'straw dog' options in a virtual workshop is to explain to the planners how the

options have come together, e.g., research you have done and reviewed supports the proposed direction; outputs from their environmental scan relate to the new opportunities they're proposing to address; the draft priorities, goals and objectives being considered do align with the vision, mission, etc. In a condensed planning session, where people are so visually focused, it's essential to make the process simple and connect the dots for them.

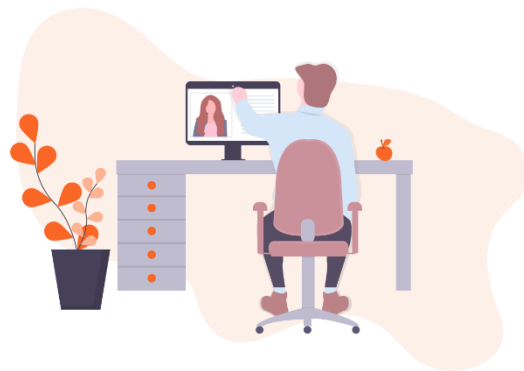
## The Do Not's of Virtual Planning

1. **In Zoom We Trust:** Technology isn't perfect and will let you down. We've all had many virtual meetings go smoothly and then suddenly the Internet is overwhelmed and people are frustrated. So do not proceed without a contingency in place for an unstable platform, power loss (especially when it happens to the meeting host), and participants who may be in remote locations without high speed Internet.
2. **On-the-Fly Learning:** Be sure you are familiar with the features in your virtual meeting platform or other programs and ask experienced people what to do before the unusual arises (e.g., the board chair must participate but is in a room with loud construction outside).

Also, anticipate some participants you ask to do work (e.g., share their screen to report on a breakout task) may not know how to do it, so preempt that moment by pre-assigning roles, proactively telling people what's involved, and helping them prepare with a quick advance tutorial.

3. **Assume It Was Received:** I have yet to facilitate a workshop and *not* have someone say, “I didn’t receive the template/worksheet for this task.” Of course, you emailed it to them the day before *and* you posted it with clear instructions in the on-line project management bulletin board. You need to be ready to multi-task: Explain the assignment, re-send documents, place people in break-out rooms, all happening smoothly within a few minutes.
  
4. **Just Another Workshop:** While all the do’s and don’ts demonstrate this meeting experience is different, the one major don’t is to complicate the agenda. Keep it simple. Simple instructions. Clear examples. Easy to follow templates or worksheets for break-out tasks. Modest ‘asks’ – do two things, not six. And prepare – as noted above, this is more than a workshop, it’s akin to a production.
  
5. **Overlook Non-Verbal:** Good facilitators find ways to draw people into the conversation so that everyone feels their perspectives have been considered. It can be easier in a virtual session to ‘tune out’ if not engaged – shutting off one’s camera being the most obvious. Many can relate to having muted their microphone so they can type an email or even listen to other media. In larger groups especially, video meeting platforms highlight the speaker(s) and we may not realize who has not weighed in. Therefore, it’s important for the meeting host/facilitator to be mindful of all participants and not overlook the silent ones. Zoom used to have an attention tracking feature to see who wasn’t paying attention in the meeting but for privacy reasons they disabled it in April.

A bonus tip on the do not list: Do not overlook recording the session or at minimum the most important parts such as breakout group reports. Virtual meetings are a visually ‘busy’ environment and monitoring the work, who is next to speak, and keeping notes from the output can overextend even the best facilitators or meeting chairperson. The recording lets you go back and extract the specific ideas you may have inadvertently missed.



The Portage Group is a full-service consulting firm serving the association sector and other member-based not-for-profit organizations. Practice areas include strategy development, research, and executive search.

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