Virtual Offsites That Work

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Are "offsites" off for the foreseeable future? In the midst of the current pandemic, social distancing recommendations and travel restrictions have made it difficult, if not impossible, for organizations to convene teams of any size within their offices, much less at sessions outside them.

Not surprisingly, the initial reaction for most has been to postpone or cancel those events, over concern that working together by phone or video conference won't be as useful or productive as the in-person meeting would have been. But some of the meaty, controversial types of topics often reserved for the rarefied atmosphere of an offsite need to happen now more than ever. So we need to learn how to do them virtually, just as we're doing with every other vital work process.

The foundation of an effective virtual offsite remains basic meeting management: clear objectives, a well-crafted agenda, concise pre-reads, a well-chosen group of attendees, documented decisions, and specific next steps, etc. Special considerations for offsites versus other meetings have been covered many times, including in our firm's HBR article "Offsites That Work." We also introduced some best practices for running virtual meetings in this post.

But virtual offsites were, until just a few weeks ago, a rare exception. Consequently, many executives either convening or designing these sessions now are in uncharted waters. Drawing from our decades of experience running both in-person and virtual offsites, we've distilled some practices – over and above the basics – that you can employ to help make yours effective.

Prepare for Your Virtual Offsite

As with any offsite – in some ways more so with a virtual one – success hinges on what happens before it begins. Here are five steps to take ahead of time:

1. **Provide attendees with the tools they'll need.** Whether detailed in the pre-read, or in a brief pre-meeting session, instruct everyone on exactly how to install and set up the software and video technology needed to participate. One client even provided a high-definition webcam and an extra monitor to each attendee, which allowed them to see participants on one screen and the shared document on the other.

2. **Ensure everyone knows how to use the technology.** Provide opportunities to practice using all the features to be used during the offsite. In Zoom, for example, you can set up a test "lobby" so attendees can familiarize themselves with how to "raise hands" or use the chat function.

3. **Carefully design the offsite's flow and conduct a dry run.** For each section of the meeting, start with what you want to achieve, sketch out each exercise initially independent of the technology, then consider what's possible with the software. Make sure you keep the activities simple enough for your least technologically advanced attendees. Meeting organizers and facilitators should practice every module of the meeting exactly how it is envisioned. Given technology limitations, it can be more difficult in a virtual setting to shift and redesign a meeting "on the fly," so make sure you are equipped with plans B and C if needed.

4. **Assign clear roles**. Like a movie production, individuals running the offsite need to be clear on who should do what. Who facilitates each conversation? Who handles the technology including screen sharing, monitoring chat, calling on attendees who "raise hands"? Who should attendees contact if they have technical difficulties? Who steps in for the facilitator if he or she encounters technical challenges?

5. **When in doubt, limit the size of the group.** A common mistake made with offsites is to invite too many participants. In a virtual setting, with no physical or cost constraints, it is even easier to just send a link to expand the invite list and, before you know it, you're having a town meeting rather than a carefully designed conversation. Use the scope and objectives as a guide to determine who should attend.

Conduct Your Virtual Offsite

Great offsites require everyone's full engagement and active participation, which proves even more challenging in a virtual setting. Offsite leaders should consider the following:

1. **Display a welcome screen when people join the meeting.** As attendees sign on, welcome them with specific instructions or reminders on the screen to ensure they are set up for the session. For example, in a recent offsite using Zoom, attendees were greeted with the following message: Welcome! Please exit full screen (but maximize your viewing window), open your chat window (by clicking on "chat" in the toolbar), and raise your hand (by clicking "raise hand" in the toolbar).

2. **Make it interactive from the start.** We recommend an activity or ice breaker at the beginning to connect participants and make them comfortable with the virtual setting. One client asked each individual to take one minute and share what had been happening in their lives professionally and personally. She went first and modeled the tone and candor of the exercise, explaining that a loved one was ill and describing how it had affected her. Others followed suit and immediately the group felt more connected and comfortable with each other.

3. **Set clear ground rules.** Like any offsite, you need ground rules. Typical ones we use for in-person offsites still apply – return from breaks on time, be candid and honest, headline your comments, use tricks for cutting people off, etc. Others will be specific to virtual meetings – "raise hand" instead of jumping in, stay on video throughout, mute when possible (but no need to apologize for the occasional barking dog or crying baby).

4. **Take more frequent breaks**. Because participants are sitting in front of a screen for the duration, we find that 15-minute breaks every 90 minutes give people time to reset, handle other business needs, and deal with issues at home. One client has the group take an hourly 60-second "pit stop" together to stretch, do jumping jacks, or take a walk around the living room.

5. **Minimize presentations, maximize discussion.** We've said this before, but long presentations can really destroy a meeting's momentum. Background information, whenever possible, should be well edited and provided in advance. If a brief presentation or update is required, use screen sharing to show the material so everyone can follow along.

6. **Use technology to maximize participation, engagement and interactivity**. Gathering input constantly during a virtual offsite is critical, especially since visual cues are more difficult to read. The features included in video conferencing software and other easily accessed survey and collaboration tools provide numerous, easy-to-use techniques to take everyone's temperature and capture the thinking of meeting attendees that go beyond seeing faces and interpreting body language. And if used correctly, they allow all attendees to more easily put their opinions "on the table." Here are a few techniques we've employed during virtual offsites:

   o *Breakouts.* Though not available on all systems, putting attendees in small virtual groups helps to break up the day and provides a more intimate setting to solve problems. One client was amazed when – with the push of a button – 20 meeting attendees suddenly found themselves transported into one of four five-person video conferences, with our facilitators dropping in and out of their conversations. After 20 minutes drafting their approach to a problem and writing it up on a PowerPoint slide, they were brought back to the larger group. While breakouts need to be planned well (we find filling out a common template to be a great addition), they can be as much a part of a virtual offsite as a traditional one.

   o *Voting.* Poll people early and often. Technology embedded in most video conference systems or phone-based tools such as Poll Everywhere allow participants to respond anonymously to questions in real time. Remember, don't just ask yes-or-no questions. Questions that ask attendees to indicate the extent to which they agree with a statement often on a 1 (do not agree) to 5 (completely agree) scale go further in really teasing out opinions virtually.

- o *Stamping.* Similar to placing dots on a wall chart in an in-person offsite, allowing participants to annotate or "stamp" a shared screen is a powerful way for all attendees to provide feedback, indicate preferences, or identify where they have questions. In a recent offsite, a client shared a slide containing 20 potential products and asked each attendee to place a stamp (a star in this case) on the five the organization should pursue over the next 12 months. Very quickly, it was apparent where the group was aligned and where opinions differed.

- o *Chat.* Most video conferencing technologies offer a chat function. While you might need some ground rules to prevent the conversation from becoming unruly, chat provides an additional forum for attendees to offer opinions to the full group or directly to the meeting facilitators. For instance, as part of one exercise, we asked attendees to submit new growth ideas to the full group via chat, which allowed us to more efficiently develop a consolidated list to review with the group.

7. **Gather session feedback.** Solicit attendees' feedback while the experience is fresh in their minds. Ask: Going back to the very beginning of this meeting, from the moment you received the invitation through the pre-meeting survey, the pre-read, the agenda, the technology, the discussion: What could be improved? If we could "run the tape" over what would be different? Then ask: What went well? What should be repeated? What did you like?

It's impossible to replicate the experience of an in-person offsite in an online setting. But with the right preparation, a focus on good meeting practices, careful use of various tools, some rehearsal, and a willingness to experiment as a team, it's not only feasible but relatively easy to conduct virtual offsites that allow you and your team to productively tackle even the toughest issues. And it's likely you may have to do just that for quite some time.

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