

The Remote Facilitation Guide

by Charlotte Taverner-Whelpton

From thoughtful planning to design and delivery—
a facilitation leader's complete guide to creating engaging
and productive remote experiences.





The Remote Facilitation Guide

Engagement Strategist Charlotte Taverner-Whelpton specializes in facilitating remote workshops and gatherings: a skill that many of us are increasingly being called upon to develop. In this pragmatic guide, she breaks down the tools and methods she uses to cultivate empowering remote environments for teams.

Whether it's an intentional conversation, a specific moment in our process, or a well-planned strategic workshop, creating spaces for our team to do their best work is a significant part of my role at Domain7. And it's largely done remotely.

Remote working is not a new concept to our organization. As a globally distributed team, many of my colleagues work from locations across North America and in the UK, as do many of our clients and partners. The events of this year have only increased the remote nature of my work, with most of our team and clients working from home. As the world continues to shift, we've reshaped our facilitation practices to an entirely remote approach, while preserving our deep commitment to collaboration.

Listening to our community, we realized that our experiences could be helpful in a time when most leaders and teams are grappling with new ways of working together. Whether you're planning a critical meeting to progress the goals of your project, or a specific workshop to ideate and co-create, the principles are the same. The work of a facilitator is to ensure that gathering spaces are established with consideration and intentional design from initiation through delivery. If you want to move from insights and ideas towards actions and outcomes, there are three key areas to consider in facilitating a collaborative workshop or meeting:

- 1. Plan with intention.** The work starts well before we are in the "room" together.
- 2. Orchestrate with precision.** Details matter, especially in the digital space.
- 3. Bring closure.** Ask for feedback and evolve the practice.

In the following guide, I'll unfold what we've learned in these three areas over the recent months (and years) in the remote facilitation space.



Principle 1: Plan With Intention

When delivering workshops in the digital space, we've found that 90% of the effort comes before you even step into the digital room. The preparations for showing up well—as facilitators and as participants—are crucial for the success of the workshop. Here are the key elements to consider in your planning.

1. Establish a Purpose

Establishing clarity around why we are gathering people is important, regardless of the mode in which we're meeting. Knowing and clearly establishing a purpose is foundational. Everyone should be invited into a space in which they can clearly articulate why they are there, what it means to be a contributor to the space, and the goal of the time together. Think less about the logistical details (though they are important as well), and more about the underlying vision of the time together. Answer the questions: "What is the goal of this time together?" "How will this workshop deliver on that goal?"

2. Invite with Intention

With an established purpose set, we can intentionally invite participants into the gathering space. My own facilitation practices have been strongly influenced by the work of Priya Parker and her book "The Art of Gathering". Parker is a master of designing gatherings that resonate with intention and purpose. In one of my favourite Parker quotes, she explains "Your gathering begins at the moment your guests first learn of it." As soon as calendar invites are sent, anticipation has been sparked and the journey has already begun. As Parker puts it "host the pre-game." How participants show up in the spaces we host is shaped by the work we do in preparing them well.

Practically speaking, the established purpose of the meeting needs to be communicated to participants, so they can begin envisioning the gathering and understanding its value. When we send out an invitation, we start with an overview of the purpose of the gathering (think: a couple short sentences that set the tone for the meeting), as well as offer a clear invitation of how to show up. It's easy to assume that everyone is on the same page when it comes to remote meeting etiquette and creating an environment for fruitful collaboration. Avoid misunderstandings by ensuring that participants know what is expected of them in terms of being present, an active participant, and respectful of the space that they're invited into.



Once the purpose and expectations have been articulated, remember logistics. Ensure that time, dates, and links to conferencing platforms and additional tools are included. If you're introducing tools that may be new to participants, ensure that they have an opportunity to build some level of familiarity ahead of the session. If you're using a new video conferencing platform (Google meet, Zoom) or a new collaborative working tool (Jam Board, Miro), consider either hosting a pre-event to orient folks or send demo videos and test environments in advance. We try to use tools that have a high level of familiarity and low level of friction to ensure participation is not inhibited by technical overwhelm.

[Here's our basic email template.](#)



3. Design the Agenda

With our purpose and goals set in place, it's time to shift your attention to the tangible details of the workshop. The activities you use should be reflective of your workshop goals. Perhaps you're running a [co-design workshop](#) where the focus is on generating ideas and designing possible solutions; or maybe you're hosting a [workshop about discovering opportunities](#) in a shifting world. Whichever direction you are moving, ensure the activities are aligned with the desired outcomes. You may consider delivery methods that include:



Full-group sessions: information is presented, participants reflect on new information, light share-back happens across the room

Individual reflection: time for independent thinking to process and contribute to the workshop

Breakout groups: smaller groupings of people for meaningful discussion and to move a process through specific activities

A well-designed agenda provides a minute-by-minute schedule for every activity, including instructions and breaks. Timing is everything. Breaking down activities—minutes to present, minutes to individually reflect, minutes for group discussion—will keep the session on-track. Particularly when the facilitator role is being shared by two or more people, clear articulation of ownership and timing ensures that the workshop is orchestrated and flowing well for a seamless participant experience.

It's important to remember that digital fatigue is real, and building in 15-minute breaks every 90 minutes will make a world of difference to participants. Our experience suggests that participants begin to really tap out at the 3-hour mark in digital contexts. Whereas we might run a full day (eight-hour) design sprint in-person, with online experiences we would consider breaking the sprint into two half-day sessions. The time between sessions can be thoughtfully guided; facilitators can leave participants with questions to consider before returning for the final portion of the experience.

[Here's our basic agenda flow template.](#)

4. Establish Facilitators' Roles

Both the facilitator and participants play integral roles in the success of any workshop. Just as we communicate a clear role and set of expectations to our participants in the workshop invitation, so too we need to articulate the facilitator's role and what the participants can expect of them. This is particularly true when we have multiple facilitators sharing ownership of workshop delivery: we need to clarify how their roles intersect and flow between one another. We've found there are three facilitator roles that contribute to the success of a digital workshop:

The Content Facilitator. This role remains somewhat fluid and adaptable between co-facilitators over the course of the workshop. As facilitators, we will often switch between content and technical modes as we shift between different activities. The variation in voice, tone, and style which different facilitators bring into the space can be refreshing for participants, and can help keep engagement high.



The Content Facilitator in any given moment leads the overarching activities and content, whether that's delivering lecture-style content, or facilitating the group as they work and ideate together.

The Technical Facilitator. This role can also remain fluid between co-facilitators. Whoever is wearing this hat owns the flow of the digital space—managing participant chat threads and moving participants between different modes such as breakout groups and individual activities. This role instructs on logistics, and helps participants anticipate how to interact with each other in this “new” medium.

The Technical Producer. This role can perhaps be considered a “nice to have,” though once we hit the 30+ participant mark, our experience has been the role becomes mission critical. A technical producer is a silent, behind-the-scenes role who manages the nitty-gritty details of the digital space. They may set up the technical platform that we'll be using to run a workshop, manage breakout rooms and participant assignments, and tackle technical issues. They also tend to run a technical dress rehearsal. Often this role is performed by an IT support professional.

5. Select the Technology

Choosing the right technology is generally the last step in our process—and with good reason. Our agenda should inform the software choice, not vice versa. The platforms we use will be informed by a few considerations:

How many participants do we have?

Is there a technology that participants and facilitators are already comfortable with, which also meets our agenda needs?

*What different modes of work do we need to accommodate?
(ie. breakout rooms, screen sharing)*

*Is the technology frictionless? (Requires no login or has a simple login.
Presents a minimal learning curve.)*

Currently, Zoom is our team's video platform of choice, largely due to its flexibility, interface, and specific, helpful features such as breakout rooms. We've found that most (if not all) folks have had some experience with this platform, and those who haven't tend to catch on quickly. Though Zoom (and most other) platforms accommodate any device (desktop, tablet, mobile), we've consistently found that participants engage best on a desktop device.



Next, consider how to deliver the collaborative activities that are likely part of your workshop flow. Whether it's shared Word docs, sticky notes, whiteboards, or an interactive spreadsheet, having a tool that is accessible by all participants and works in realtime is a key way to create a sense of togetherness and collaboration from afar. We've used Google Jamboard, Miro, and even Google Docs and Sheets with lots of success. Let your activities inform the technology choice that will serve you best.

In cases where you are introducing a tool that may be new to folks—let's take Miro as an example—ensure there is time for onboarding and familiarisation with the tool ahead of the workshop. The goal of a tool is to facilitate the flow of the content, not become a point of friction and frustration. Our team has created some basic test boards to help users try out the basic functions of Miro before they even get into the room, to build confidence in their skills.

Principle 2: Orchestrate With Precision

1. Set Up Your Workspace for Success

Practically, I like to ensure that my work space—my laptop and second monitor—are set up to ensure optimal viewing and flow for myself. On my laptop, I will be running the video conferencing tool at full screen. This is where my webcam is, which means that the majority of my time is spent looking attendees in the eye and practicing presence. On my second monitor, I will have a browser window open for whatever collaboration tool we're using, as well as a separate browser window for the agenda that I'm referencing. I will also have a backchannel chat running with my co-facilitators (most often on Slack) in case we need to make any quick adjustments, or pass vital information to one another.





One note on the backchannel: I try to keep communications here to a minimum. I find that pauses to openly collaborate and temperature check with a co-facilitator in the presence of participants is completely appropriate and builds confidence in the group. Often if I, as a facilitator, am sensing something is “off” or that we need to slightly reorient our plan, the participants are feeling it too. Naming these feelings and working through them in a collaborative way demonstrates the approach that we’re aiming to cultivate amongst participants. That being said, sometimes you need a private connect with a co-facilitator, and the backchannel provides this route.

2. Lead with Presence

It’s now finally time to deliver the workshop. Remember when I said 90% of the work was in the pre-planning? It’s true. Once you step into the room, your job as the facilitator is to follow through on all the great plans that you have laid out in advance.

So much of your role at this moment is to set the tone, embodying the invitation for people to show up and engage. As a facilitator, it’s always my aim to be in the room at least 10 minutes before the start time. I personally find it helpful to have some fun and chill waiting tunes playing while participants trickle in. (Here’s the [Songs for Waiting](#) playlist I’ve been using.)

Once participants have arrived and you begin the session—ideally on time—a simple way to establish the environment is by re-stating the invitation of how we want participants to show-up. Think of it as the workshop charter. My invitation has generally looked like this:

Be present. Turn off distractions (phones, tabs for internet browsing and email checking, other communication notifications). Be on time. Turn on your camera to create a sense of togetherness.

Be an active participant. Our success is dependent on everyone engaging in the work.

Be conscious. Hold space for all team members to contribute. Have an awareness of time, and share the space.

Asking attendees to give a head nod or a thumbs up to show their agreement and buy-in to this invitation helps to establish participation and engagement from the outset.



3. Model Engagement

We've likely all experienced how easy it is to zone out on video conference call. Body language is harder to read, subtle sounds and tone of voice can be missed, and we struggle to feel truly connected to one another. A key requirement—and one that I would say is non-negotiable when running a workshop—is having participants turn their cameras on. This makes a world of difference in cultivating togetherness.

I generally ask attendees to keep their mics muted when not speaking - it really helps to cut down on noise, and increase overall sound quality for everyone. However, as a facilitator, I'll keep my mic unmuted and—as appropriate—provide participants with nods and gentle affirmations when appropriate. These small indicators of engagement go a long way for participants who are sharing.

Another piece to consider with participants sharing in the group setting is how to phrase questions. Generally speaking, posing the question “does anybody have anything to say or contribute?” falls fairly flat as a facilitation method. Either you are met with radio silence, as no one wants to be the first to break the silence, or there are too many voices and not enough time to manage it well. Often I will intentionally call on specific people and ask for a contribution, particularly when we are working in small breakout groups. Preparing people for times of sharing, letting them know we'll be coming back to the full group session, and asking one spokesperson from each breakout group to share for two minutes, is a great way to set folks up for success.

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As a facilitator in the digital space, you'll find yourself in moments where you are pausing and waiting, as the groups split off into their breakout rooms and you are playing the role of timekeeper and preparing for the next activity. In these moments, you have a great opportunity to connect with your co-facilitator, check in on how the session is running, and make any necessary adjustments to timing or activities. Additionally, you can be present to respond to raised hands or calls for help from breakout groups who may be stuck. It might also be a quick opportunity to take a bio break and grab a coffee.



Principle 3: Bring Closure

1. Ask for Feedback

One of our team's goals is to continuously learn and improve the workshops we offer. Every time we run a workshop, it's an opportunity to hone our skills, and become aware of our blindspots. What has "always worked" but might need to be rethought for a new context? Which tools resonate with specific groups of participants?

The easiest way to gain valuable feedback is to send a brief survey to participants following the workshop. We will generally share this in the video conferencing chat as part of our closing time, as well as send a link in a follow-up email to all participants. The key is to ask meaningful questions that will help your team identify areas for growth, while also keeping the survey short and easy to complete in a short amount of time.

[Here's our basic survey agenda template.](#)

2. Harvest Takeaways

In most cases, you'll have some ownership in harvesting the takeaways from the workshop. Whether that's combing through the ideas that have been generated to prioritise next steps, mapping out a future roadmap for a project process, or simply summarising the insights gathered into a document for the team to review. One of the greatest gifts of facilitating in the remote digital space is that the work of transcribing paper to digital is already done for you. Leverage tools that will support your goals and make the synthesis process easier for your team.

With remote facilitation, the work of transcribing paper to digital is already done for you.

Start here, grow anywhere

Shifting to the remote digital space can feel like uncharted territory. Remember that as with any skills, confidence comes with practice and experimentation. Start by applying these principles to your next digital meeting and see where things can grow from there.

Want more? If you're interested in engaging with this content in another medium, check out the [recording of a lunch and learn](#) that Kevan and I ran for the Domain7 team.

What are some challenges you've been facing in the remote facilitation space?

Reach out to us at hello@domain7.com if you'd like to discuss ways we could help your facilitation practice or organizational goals.



The Remote Facilitation Checklist

Here's Charlotte's handy checklist for planning a successful remote facilitation experience.

Pre-Event

- Establish a Purpose
 - Why are we meeting? What is this workshop going to do?
 - Create alignment between the internal delivery team and the external client team (particularly the sponsors)
- Invite with Intention
 - Send an invitation (email or other) that opens with the purpose of the event (what it is and why it matters) and how attendees are invited to show up and participate
 - Include logistical details at the end:
 - Date and time
 - The technology (meeting platform, additional tools)
- Design the Agenda
- Establish Roles
 - Content facilitator
 - Technical facilitator
 - Technical producer
- Select the Technology

During Event

- Set Your Workspace Up for Success
 - Have a second monitor
 - Ensure easy access to all tools, agendas, communication channels
- Lead with Presence

Post-Event

- Ask for Feedback
 - Create and send out a survey for participants
- Harvest Takeaways
 - What was generated from the workshop?
 - What are the next steps?