

DOING DIALOGIC ORGANIZATION DEVELOPMENT *... ONLINE ...*

A CURATED LIST OF IDEAS AND
RESOURCES

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March 27, 2020

With the corona virus epidemic every self-employed consultant I know is scrambling to figure out how to do their work remotely.

I have no idea how long this virus will force organizations to keep people away from each other – much longer, I suspect, than the average person is expecting.

But I am confident that one of the lasting effects of this crisis is that more and more human interaction is going to move online, and we are going to have to learn how to bring our organization development skills to this new milieu.

So, I put a call out to my network and was heartened by how many people responded, saying they had something to say, and would write it up. I expect to revise and update this many times in the coming weeks (and you will know the revision by the date on the cover).

In the meantime, I wanted to offer some help as soon as I could, and here you will mainly find links to blogs that I thought offered useful ideas. If you have something you want to say, or know of someone with a contribution to make, please let me know

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Online hosting

The following is an excerpt from Mark McKergow's new book coming very soon in the BMI Series in Dialogic OD on *Hosting Generative Change*. It was his last-minute inclusion of this in the manuscript that prompted me to curate this document.

More and more work is being done in online and virtual settings. How can we use these environments to host people in generative change conversations? It turns out that the principles described in this book, the six roles and four positions of a host, still hold good. The difference, of course, is that the space we are creating is now online.

The online environments available have come a long way over the past few years. It used to be that simply putting a Skype group call together was an achievement, but now platforms like Zoom, Microsoft Teams, BlueJeans and others offer flexible and economic access to participants worldwide. Indeed, it may be that hosting your generative change conversations online might be even more effective – no travel bills, wider access, a chance to bring in other voices more easily. And the sessions can be recorded for subsequent sharing.

A key feature for our work is the possibility to use 'breakout rooms' – splitting a large group into a number of smaller groups, each with their own space. This increases the potential for online work enormously. This used to be an expensive extra, but now comes as standard with many packages.

One good option is to split what might have been a single event or day's workshop into several shorter online sessions, with small groups working together in between. The groups can do this in all kinds of ways, and you can also help by making sure that each group has access to the platform or at least to some channels for interaction. The work can also be shared in advance of the next event. You might want to ensure one member of each group acts as host for the interim work.

Another option is to use several different 'Zoom rooms' or other spaces, as if they were real rooms, and have different sessions convene there through the

time. In this case you will also need an accessible list of the room addresses and a room host for each space to stay there and help sort out what's going on.

Before the event

Everything in this book still applies in terms of the groundwork, building the challenge and purpose of the project and event, working out who to invite and engaging with them. In terms of preparing the space, you should find an online platform which supports breakout rooms that your participants are familiar with (or at least can access). You can't work for as long online – so think in terms of one or two 90 minute sessions with at least 15 minutes break between sessions.

In the invitation, tell people:

- The online platform to be used, and a way to allow participants to test their set-ups beforehand. (It may be worth running a test session for this purpose if your participants are unfamiliar with online work.)
- That everyone will need a camera and microphone – seeing people is vital
- To arrange to be in a quiet place if at all possible – you wouldn't bring a crowd from the coffee shop into a meeting, why should this be different?

You will also want to prepare the processes to be used. It's not as easy to flex processes in midstream online, so preparation is vital. Consider using Google Docs or similar as working spaces for people to write as they work – these will need to be set up in advance, perhaps with templates or headings in place. Everyone can access these during and after the session, and see what others are contributing.

During the event

Consider sharing the hosting tasks – it's not at all easy to keep track of everything that is going on, the technical stuff, the Chat box, the engagement, and so on.

Be online early to welcome people and help sort out technical difficulties. Start off, as you would normally, with a brief welcome and check-in. This can be a simple 'who are you and where are you today?' one-liner or similar – get all the

voices in the room. If you want a more detailed check-in, you can use the breakout rooms to get people talking. Remember this is NOT a webinar, so don't just launch into slides and presenting.

In establishing ground rules, include 'cameras on' as the norm – it helps people stay attentive, helps everyone see how others are reacting and builds participation. Some people have a 'no-mute' policy too, for similar reasons – do this if you can, though sometimes background noise and feedback make it impossible.

Encourage people to use the Chat box to type in questions and reactions as you go along. In some ways this is even better than getting contributions in a room, as several people can do it at once. These Chat threads can usually be saved and distributed afterwards if you wish.

When moving to small-group working, make sure the questions / process are shared in such a way that people can still see them! The main screen is often not visible in the breakout rooms so share in the Chat, in the working documents, and in other ways. It's impossible to be too clear! Keep the groups smaller and the timings shorter than you might in-the-room.

Using Google Docs or other shared spaces to capture the groups' work also helps in avoiding report-backs; everyone can scan through what has been written. I suggest using a single document for all the groups (with different pages for different groups) – it makes this process much easier. The link to the document can be shared on the day.

End the session by setting up whatever is to happen next – see below. One nice touch is to have everyone say 'Goodbye' or whatever at the same time, with all the mics open.

After the event

Of course you will want to thank everyone and share whatever has been produced together. Do this as swiftly as you can – it both looks organized and encourages others to press on with their next steps.

Links to useful Blog Posts for remote Dialogic OD

Rachel Smith Rachel has a lot of material about virtual facilitation on her site: <https://digitalfacilitation.net/>. Some you may find particularly useful

A Crash Course in Translating Your Process to a Virtual Setting

<https://digitalfacilitation.net/?p=627>

A bare-bones crash course in how to translate your face-to-face offering to a virtual one that covers your mindset, mental model, converting your existing agenda, getting help, matching processes with tools, and common problems you may encounter. Includes a table matching virtual tools you can substitute for common meeting processes.

Red, Green, Blue: A Speedy Process for Sorting Brainstorm Ideas

<https://digitalfacilitation.net/?p=596>

Using a sticky note tool for brainstorming in remote meetings is a wonderful method to gather a lot of different ideas quickly. But once those ideas are up on the shared board, the task of sorting through them and choosing which options to pursue can be daunting. Here's a method for tackling all that information and turning it into a manageable dataset, and a list of some of the pros and cons of doing it this way.

How long does it take to get things done in a virtual meeting?

<https://digitalfacilitation.net/?p=447>

You have a good sense of how long things will take in a face to face meeting – how do you translate that into the time it will take in a virtual meeting? Offers pointers on how to allocate time in virtual meetings for things like switching tools, using breakout groups, stretch breaks, etc.

Nancy White. Nancy is experimenting with different approaches to remote facilitation and may have more to say about this in the coming days at <http://www.fullcirc.com/>

Moving Online in Pandemic: Ecocycle to Attend to What is Shifting

<https://fullcirc.com/2020/03/08/moving-online-in-pandemic-ecocycle-to-attend-to-what-is-shifting/>

A long list of tips on how to take your hosting and facilitation processes online, with links to lots of relevant resources.

Moving Online in Pandemic #3: What to STOP doing!

<https://fullcirc.com/2020/03/10/moving-online-in-pandemic-3-what-to-stop-doing/>

In the race to do SOMETHING as we are forced to move many group interactions online, there is something we MUST NOT DO. That is replicate terrible offline meeting habits online. They only get worse.

Chris Corrigan Chris has been blogging for years on Dialogic OD and the Art of Hosting at <http://www.chriscorrigan.com/parkinglot/blog/>. This recent one is of particular interest:

Slow Down: A reminder for facilitators working online

<http://www.chriscorrigan.com/parkinglot/slow-down-a-reminder-for-facilitators/>

Pointers on how to prepare and host online meetings, with specific issues for our current covid-19 crisis

Andy Smith Andy provides online training in Dialogic OD, particularly appreciative inquiry: <https://coachingleaders.co.uk/>

Free Online Collaboration Tools Compared

<https://coachingleaders.co.uk/free-online-collaboration-tools-reviews/>

This doesn't pretend to be a comprehensive evaluation of every whiteboard tool and app out there (there are loads of them), but a quick comparison of the ones he has tried out, with pros and cons.

And a great tip Andy mentioned to me, but isn't in this blog, is that if you plan to share you screen when running a meeting on zoom, log in with another laptop and use that to for screen shares – that way you aren't also sharing you host control panel!

Judy Rees, Judy has been teaching facilitators how to work on line for years. Her blog is at <https://judyrees.co.uk/>

Six Tips to Make Your Remote Meetings Not Suck

<https://judyrees.co.uk/six-tips-to-make-your-remote-meetings-not-suck-part-1/>

Some unconventional thoughts, based on personal experience, for bringing a human touch to remote meetings

How to Track Energy in an Online Meeting

<https://judyrees.co.uk/how-to-track-the-energy-in-an-online-meeting/>

Judy says, “When I [researched the fears of great-in-the-room facilitators and trainers](#) who flatly refused to work online, tracking the energy emerged as the number one issue.” Here she lists some ideas for how to keep track.

Another solution to this problem when you are using breakout rooms in zoom that emerged in my conversation with Andy – have separate laptops linked to each room so you can see what is happening in each simultaneously.

How to Take Your Conference Online – While Keeping It Friendly

<https://judyrees.co.uk/how-to-take-your-conference-online-while-keeping-it-friendly/>

A check list overview of what to do to run a large group conference with multiple simultaneous events.