

Winning from Home: Remote Workshop Best Practices

As a continuation of our “Winning from Home” series where SSA & Company is helping clients identify ways to help their employees be effective working in a remote environment, one of the more challenging scenarios that some of our clients are facing is managing ongoing work where large groups of employees need to come together for workshops or large-team work sessions. One of SSA & Company’s large clients, with employees spread out across the globe, is in the midst of a large business transformation and needed to conduct a workshop with 70+ colleagues in geographically dispersed locations (See Figure A).

The driving objective was to coordinate the 70+ colleagues from around the world to join four separate lean workshops over the course of two weeks. The workshops were designed to create alignment around key challenges to be addressed and proposed process solutions, agree to a list of prioritized actions, and identify implementation owners. The SSA & Company team successfully helped to facilitate the workshop. Below are some of the best practices we employed to ensure seamless interaction and generate positive momentum coming out of the workshops.

Prior to holding the workshops

- **Engagement:** Provide an agenda and pre-read material for all workshop participants no later than 24 hours before the kickoff. Let the participants know how much time the pre-read requires.
- **Potential Risks:** Workshop participants may assume their input does not matter to the broader group. They also may neglect the pre-reading due to the mentality that “someone else will raise their hand”.
- **Mitigation Tactics:** Ask all workshop participants to come prepared with a list of questions, take notes, and be thoroughly engaged throughout the duration. You can also require participants to deliver various report outs to the group, so they come adequately prepared.

During the workshops

- **Engagement:** As a workshop facilitator, it is important to share all the content that will be covered at the beginning of the web conference. Ask all workshop participants to turn on their video functionality (if bandwidth capacity abides). Be sure and prompt all attendees to ask questions and speak up if they are not clear with something.
- **Potential Risks:** It is easy for participants to become distracted, complacent, or uninterested in the subject matter. Technology connectivity issues also pose a risk when dealing with larger groups, some of whom may be in countries with lower bandwidth availability.
- **Mitigation Tactics:** To keep the participants involved, use polling or survey features to record responses to outlined questions in the pre-read content. In video conference platforms such as Zoom or Webex, leverage the chat features to keep attendees engaged. If you are experiencing connectivity issues, ask only those who will be speaking to use their video functionality and ensure all participants who are not speaking to mute their microphones.

After the workshops:

- **Engagement:** Be sure and record meeting minutes and send a recap (whether full recording or a synthesized summary) to all workshop participants. Send follow-up emails to participants outlining their responsibilities for the following workshop.
- **Potential Risks:** Participants may lose interest or may not understand their responsibilities in between workshops. Post-workshop follow-ups or responsibilities may be neglected by participants if they are not thoroughly outlined by the facilitator.
- **Mitigation Tactics:** Reassign new workshop participants to come prepared to speak at the next workshop and prepare any material to present to the group. Identify owners for all deliverables and give them hard deadlines. Schedule individual follow-up calls with siloed parties with direct responsibilities or action items.

Global workshop participants



Figure A