



Tips for working remotely and video conferencing

Consultant Network

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Tips for working remotely

Working and meeting people remotely is quite different than face-to-face. We've assembled the following guide to help you master the technology and consider the best practices to engage your participants during workshops.

Preparation

- As a first step, set up your remote office. Things to consider:
 1. A dedicated workspace is key. As much as possible, separate it from your personal spaces.
 2. Professional background (Wall art and decorations should be work-appropriate)
 3. Be mindful of the noise around you (City noise, pets, type of music, possible interruptions, etc.)
 4. Be sensitive to the private nature of many of your conversations.
 5. Treat your home office like a professional office with behaviour appropriate to that context.

Video conferencing - Best practices^{1 & 2}

Use video conferencing to make interactions as human as possible. Things to consider:

- Visit the [Microsoft Teams help & learning](#) section to better understand how to set up and facilitate a meeting with MS Teams.
- Use a headset for the best audio experience. Avoid using hands-free.
- Learn how to mute yourself and turn off camera when needed.
- Test video call appearance (what participants will see) prior to the event and ensure your microphone isn't too close to your mouth/nose.
- Send clear instructions to join (See the Participants Guide (For clients) we've created and attach it to your invitation if needed.)
- Launch your call 10 minutes in advance to make sure everything is in order technically.
- Provide clear instructions to participants during the call (mute, questions, etc.).
- Limit teleconferences to 90 minutes maximum.
- Try to know ahead of time if people will be sharing a speaker phone. This will change the dynamic of the call and the quality of the audio.
- Camera angle, making eye contact, posture, attitude, tone, all make a difference. Facial expressions may come across on video. As such, neutral expressions can be read as negative or pessimistic. For example, when looking up and gathering your thoughts, you'll look like you haven't mastered your topic. However, when looking down, gathering your thoughts, you'll appear thoughtful and in control.
- Collaborate on activities using secure cloud-based platforms such as SharePoint and do a "Screenshare" of the document. Can you easily co-create documents with other remote colleagues? If not, schedule time to practice and get familiar with all the digital tools that will enable you to be effective working remotely.

¹ [A Video Conference Call in Real Life](#)

² [How to Conduct a Video Conference Call & Tips on Conference Call Etiquette](#)

Technology requirements and security

- MS Teams requirements: Cloud version compatible with Google Chrome
- A high-speed internet connection.
- Avoid using a public Wi-Fi. Even if the Wi-Fi hotspot has a password, you're sharing a network with tons of other people. You don't know who else is connected and what their intentions are, which means your data may be at risk if it is intercepted. Be aware that hackers can access your banking credentials, account passwords and other valuable information when you use public Wi-Fi hotspots.

Virtual conferencing – How to facilitate a presentation³

Facilitating is not the same as presenting – the first requires the audience's participation, while the second does not (although you'd like to think they're at least listening). A facilitator guides and manages a group at an event to ensure the event's objectives are met. This could include planning the activity, asking participants questions, clarifying their input, and/or getting buy-in from everyone.

Facilitation techniques to help you

1. Elicits

Encourage audience participation by asking them questions. Try not to lecture – remember, this is not a presentation.

2. Bounce-backs

Whenever someone asks you a question, throw it out to the group before answering it yourself – like this: "Great question! What do you guys think?"

With a little luck, the audience will jump to the challenge. You need to know when to give up, though – if you only hear crickets, it's time for you to provide an answer.

3. Drill-downs

Keep an eye out for broad statements – if you think you can get more from someone, ask for more detail. For example: "Can you give me an example?" or "What do you mean by that?" or "Can you explain that further?" Making them work harder by thinking through their statement fosters learning!

What are some best practices?

1. Prepare! Prepare! Prepare!

Even though you are not giving a presentation, you will need to engage the group with some information and/or an activity. Getting ready for this ahead of the event will help you build confidence and look like a pro.

- Prepare notes and highlight key words.
- Practice from your notes until you feel comfortable using only key words.
- Practice using the video recording feature of your smart phone to make sure you keep your pace.
- Think of relevant stories/examples in advance.
- Build some interesting facts into your event in case of a lull.
- Facilitator projects credibility because they are *prepared* and know the content.
- Launch the call early, to address connection issues and questions.

³ [The Role of a Facilitator](#)

2. Set the stage

The right environment plays a big part in getting and maintaining your audience's attention. Here are a few tips to help you establish a good atmosphere:

- Always start on time.
- Always face the camera – position your laptop accordingly. If on the phone, watch your posture, project your voice properly. A slight smile will bring a smile to your voice, without exaggerating.
- Don't be afraid to use humour when appropriate.

3. Manage the crowd

You are the facilitator, so this is where you really need to shine! Try these things to encourage group participation:

- Be brief and explain things once, unless participants have questions.
- Give people a heads-up if you're going to call on them: "John, I'll come to you in a moment." Or right before the section of your call when you'll be asking questions to the group.
- Include introvert-friendly activities (Quiz, Confidential poll, etc.).
- Quiet disruptive participants by muting them as host or addressing the group as a whole. Don't call somebody out
- Use bounce-backs to correct misinformation and ensure accuracy.

4. Things to keep in mind

What Is Said

- *Elicits* are used rather than lecturing.
- Learner questions are *bounced back* instead of answered by the facilitator.
- When a learner shares, the facilitator *drills down* to dig deeper.
- Real *stories* are shared to illustrate concepts.
- Brevity promotes clarity: instructions are not *over-explained*.
- The audience is not 'rescued' by the facilitator when they *struggle* to answer.
- Facilitator projects credibility because they are *prepared* and know the content.

How It Is Said

- Facilitator's vocal tone and volume varies to maintain interest (*dynamics*).
- Presentation starts and ends with energy.
- Facilitator listens to participants and varies pace, energy, and movement to maintain interest.
- *Humour* is used appropriately to engage.
- Facilitator does not *read* the slides to the audience.

Body Language

- Facilitator directs the audience's *attention* with their body language and eye contact.
- Facilitator's posture is appropriate.

Family

Do you have young children at home? Are you caring for a sick relative?

- Ask family to respect your workspace. It is all about balance and boundaries.
- While working remotely during a pandemic, schedule your workday in a way that **includes frequent breaks** to address the needs of your children or relatives that require care.
- Intersperse your work meetings with time to set-up your children with appropriate activities. Make a blended schedule that accommodates work meetings and childcare, being as precise as possible (time-blocks).
- If your personal situation permits, consider trading off childcare duties for one-two hours at a time with a spouse.
- Obviously during the workday you want to maximize the amount of time spent on your work responsibilities, but because of the special temporary nature of social-isolation/quarantine, you will have to build a schedule daily that accommodates your caregiver responsibilities too, blended in with your work meetings.

Approach, mindset & etiquette

- On client and team calls, don't interrupt (easy to say but hard to do). Invite others to speak first. Engage your active listening skills. Take more notes than you might in a face-to-face meeting. Launch a group chat on the side so people can ask questions or comment while one person is speaking.
- No multi-tasking. Put all distractions aside and give the person talking 100% of your attention.
- When working remotely and find you cannot progress fully on your normal duties, redeploy that time to working on other things:
 - Work on ideas and tasks to grow your business in the future for when things return to normal.
 - Catch-up with clients. Reach out and check-in. Do they need any help?
 - Catch-up on overdue administrative tasks.
- Keep regular hours. And take breaks. Build physical activity into your day.
- Get up and get dressed for work even though the dress code is more relaxed (business casual). Have a morning routine and stick to it. Get ready for work, take a shower, have some breakfast, exercise, follow your schedule. A steady routine will help you balance home and work, and focus. Schedule time in your day to leave (walk, bike ride, yard work) or risk feeling trapped and cooped up. Time out in Nature lowers stress and gives you some spatial variety.

NOTE: When major events (COVID-19) suddenly capture attention, we need to be more on guard than ever about phishing attempts. Check out this short instructive video for more details (English only): <https://youtu.be/UnsW8C2yE7Y>