

Four tips for co-facilitating meetings remotely

When you facilitate meetings in person, it's easy to stay connected with your co-facilitators and meeting hosts. You can read body language and facial expressions, make hand gestures, or simply step aside together and whisper observations, thoughts, and changes of plans as needed. As you shift toward running meetings remotely, a new approach to aligning facilitators and meeting hosts can be helpful.



1 Ground facilitators and hosts in the meeting objectives and outcomes.

Use a "TO, BY, SO THAT" framework to build objectives. Then prepare an agenda outlining key phases and time stamps.

2 Align on the play-by-play details of each phase.

For each phase's activities, detail:

- **Slide #:** Which slides or pages are relevant?
- **Time:** How many minutes do we intend to spend?
- **Leader:** Who owns this phase? Assign a single owner to each phase and add step-by-step details about the activities planned for each phase to avoid any confusion as each facilitator or host hands off to the next.
 - Other roles may include note-taking, slide advancing, etc.
- **Software:** Will we use any tools (e.g., polling, whiteboard), and, if so, who will turn those features on/off?
- **Speaking points and questions:** What messages and questions will we raise?

Our objective is... 1

- To refine and ideate on ABC's [operating plan] over the coming months
- By participating in active discussion
- So that XYZ COMPANY can better understand how to collaborate with ABC's customers to continue to bring products to customers.

Agenda phases

- 12:00 - 12:15pm Opening Remarks & Welcome - Meeting Overview and Lessons Learned
- 12:15 - 12:35pm Discussion 1: Customer Experience
- 12:35 - 1:40pm Discussion 2: Customer Area 1

Agenda breakdown and activities 2

12:00 - 12:15 Opening Remarks & Welcome - Meeting Overview and Lessons Learned				
Slide #	Time	Leader	Software	Speaking points and questions
1-3	3m	SD	Screenshare	SD welcomes everyone, reviews agenda.
4	5m	SD	""	SD provides opening remarks.
5-7	5m	RS	""	RS covers meeting overview and lessons learned.
8	2m	RS	""	RS covers ways to participate.
12:15 - 12:35 Discussion 1: Customer Experience				
Slide #	Time	Leader	Software	Speaking points and questions
9	1m	RS	""	RS introduces discussion flow.
10-14	9m	SD	""	SD reviews [operating plan] and Customer experience slides.
15	10m	NC	Whiteboard	NC to facilitate conversation about [operating plan]. SD to support with answering questions that may arise. RS to capture conversation on whiteboard.

Voiceover:
We just walked through both the engagements and the Sub-Group structure. We'll be talking about the [operating plan] throughout the afternoon. Before we go further, we'd like to...

3 Set up private, facilitators-only communication channels.

You can leverage the private messaging or chat features that are already built into many screensharing/video call tools, but there's always a risk that those messages will be accidentally seen by unintended audiences. If available, use a separate device or another monitor for those back-channel communications (e.g., [Slack](#), [Google Hangouts/Meet](#), text messaging, etc.) and agree on a way to best grab each other's attention while facilitating.

4 Rehearse the session.

If you plan to use new software or tools for the first time together, do a live run-through with your co-facilitators and meeting hosts. This can help you iron out any kinks beforehand (content, tech, timing, handoffs and transitions, etc.). It's better to be awkward *before* the show goes live!

Aligning hosts and facilitators in advance will help you relax and focus on the content of your meeting, making effective use of everyone's time while providing a fun and engaging experience.