

Designing Productive Virtual Meetings Series

6 Ways to Make Pre-Work Compelling

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Most facilitators and team leaders see the value of assigning some sort of pre-work before a virtual meeting and bemoan the fact that only a small fraction of the participants take this request seriously and complete their assignments.

It's time to take a new look at how to make meeting pre-work more valuable and more compelling.

There are two important reasons to design pre-work into your webinar, online conference or workshop. The first is to get your participants ready to take full advantage of the session by thinking ahead about the content, beginning to formulate ideas or getting to know the group. Participants who have completed well thought out pre-work assignments are “primed” for active and open participation in the real-time event.

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The second is to get you ready to facilitate the session effectively. By knowing more about your participants and their interests, you are in a position to develop focused questions that will stimulate ideas. In a virtual setting this becomes even more critical, as you typically have less time in which to achieve your meeting objectives and lack the visual cues that make it easier to adjust your course in mid-stream.

The impact of pre-work on a meeting or webinar can be huge. Successful pre-work can:

- *Increase personal investment in the live session*
- *Build interest and preparedness for an interactive session*
- *Keep participants engaged and reduce multi-tasking*
- *Result in a personal connection with the facilitator*
- *Connect participants with others who will also attend the session*
- *Enable participants to self select out of a session if it is not for them*

But the reality is that participants often put their pre-work on the back burner and assume that they can “wing” their way in the live session. In fact, this undermines the meeting outcome, the participants’ feeling of productivity and your confidence as the facilitator.

Engaging Participants Ahead of Time – Ensuring that Pre-Work Gets Done

Things to consider: How can we reframe expectations to reap the benefit of pre-work? Whose responsibility is it to ensure that the pre-work gets done? How might looking at pre-work from the point of view of a contract, a requirement, a marketing opportunity or an incentive improve the level of participation?

There are ways to make pre-work compelling, enjoyable and productive. While specific tactics will vary according to the meeting format, objectives and size, they fall into six broad categories.

1. Ensure pre-work adds value
2. Create a sense of urgency
3. Provide incentives
4. Make it fun
5. Implement accountability
6. Build a communication plan

Ensure pre-work adds value

Too many times I've been asked to read material ahead of a meeting that was hardly referred to during the meeting. Pre-work needs to be viewed as valuable, either because it represents a gift or "freebie" or because it is the gate-way to the content of the session, and there are consequences for not completing it.

- Design your pre-work assignment as if it were first item in the meeting agenda, getting the meeting off to a fast start. Make it clear to participants how the pre-work will contribute to the meeting content and outcomes and their participation.
- Do more than give people something to read. Include a way for to process the material by asking them to consider certain related questions that you will address in the meeting, respond to a survey, or discuss the material with a partner before the meeting.
- Use pre-work as a way to build connections within the group ahead of time and helping to create an open and trusting environment for the actual event.

Create a sense of urgency

Even if a participant is convinced that the pre-work has value, he/she is may not get around to it because there are too many things to attend to.

- Divide the pre-work into clearly defined steps for visibility and punch, such as:
 - Step 1. Logon to our online meeting space and introduce yourself*
 - Step 2. Download and read a white paper*
 - Step 3. Post three reflections from the white paper on the online meeting space*

- Create ways of “checking in” so that you can keep track of who is getting the work done. Ask acknowledgement of your emails so you know who is paying attention.
- Have clear times for accomplishing each step and be prepared to send one or more reminders before the due date.
- Pick your timeline carefully – give participants enough time to do the work but not so much that they forget about it

Provide Incentives

Motivate your group by rewarding them for their engagement prior to the event. This can take many forms depending on the group and the objectives. It can be as simple as acknowledging their work with a personal thank-you.

- If this is a team that values peer recognition, consider rewarding the first person to complete a pre-work task with a small token or just a simple thank you.
- The buddy system is a positive and effective way to motivate people to complete their pre-work. Peer pressure is a strong incentive, and there are other benefits as well, such as creating rapport between members of the group and enhancing learning.
- Build a small group exercise into your pre-work assignment. Assign teams and give participants the contact information for other members of their group, with instructions to complete this step together. Have the teams report back together as part of the meeting.

Make it fun and engaging

Pre-work that delivers value and also provides a little fun or your personal touch will help foster a receptive group. As the facilitator, you are the best judge of what is fun for your participants.

- Design pre-work that is interesting, a real page-turner.
- Make your pre-work material visually appealing, with graphs, color and multi-media. Consider adding a fun introductory video that provides some humorous insights or instructions.
- Include an introduction exercise in the pre-work. Create an online workspace and ask participants to post a photo and comments about themselves. This gives everyone a chance to get introduced and see who else will be joining the meeting. Use the photos to create a virtual “seating chart” to use during the meeting.
- Assign each participant a buddy and make it a game – for example, the first team to email the answer to a puzzle based on the material.

Implement accountability

Establish an explicit contract between you and your participants that you will uphold by designing meaningful pre-work and delivering a session that meets stated objectives, and that you expect them to uphold by coming prepared to participate meaningfully. How you do this depends on the type of session and group. You can't use the same techniques for a free webinar as you would for a project meeting or a management workshop.

- Establish consequences for not completing the pre-work. These can range from disinviting participants after several reminders or allowing them to “de-select” themselves from the session voluntarily to down-grading the objectives of the session. Be sure to communicate these consequences early and clearly.
- Explain the pre-work requirement from the beginning and ask for acknowledgement as part of the registration process.
- For teams that meet frequently, initiate a conversation about pre-work agreements to help ensure meetings are productive. Revisit how well this is working and let the team manage the consequences for themselves.

Develop and execute a communication plan

There are two reasons why thinking out a communication plan for the pre-work is very helpful. First, it is the vehicle for communicating the value, urgency, incentives and consequences of doing the pre-work.

Second (and this is particularly true for those facilitating virtual events), time spent in advance connecting and building personal connections is enormously valuable in creating a trustworthy and enlivened environment for true sharing and interaction. In other words, a bit of advance phone and email work will pay enormous dividends.

When constructing your communications plan, be sure to take into consideration the following:

- Who is your audience? Is this a team that has already established norms and a working rapport? Is this a large group of strangers coming together for a one-time “free” webinar or members of a community of interest who are likely to continue interacting with each other? Knowing your audience will help you decide the frequency and type of communication needed.
- What are your objectives for this event? Is this a decision-making meeting where you must have everyone’s attendance and attention, or is this a free webinar where you’d just as soon only have participants who are enthusiastic and engaged?
- What are your objectives for the pre-work? The more you ask your participants to do ahead of time, the more important it will be to communicate with them individually and build a personal connection.
- What communication methods are appropriate? Are there already established communication venues for this audience? These might include a wiki, Twitter feed, newsletter or LinkedIn group. Are you able to contact each participant individually by phone or email?
- How much time do people need to complete the pre-work? Let people know how much time they should expect to take on the pre-work activity and give them sufficient notice to fit this in their busy schedules. Balance providing enough time to reasonably complete the tasks with a level of urgency to get it done sooner rather than later and risk forgetting all about it.
- What tone to use? Pre-work communications are often the first way by which a facilitator or instructor establishes their role and the tone for the session. Pre-work communications are a way to convey a personal style and connect with participants individually.

Example: Communication Plan for Interactive Webinar Series

Here is an example of a communication plan that was developed to support a free online workshop series for an audience of 20-25 consisting of trainers, facilitators and team leaders. The objective of the workshop was to engage the group in problem solving some of the challenges of good webinar design. The purpose of the pre-work was to encourage those people with a strong interest in the subject matter to get to know each other ahead of time, read and reflect on a white paper and provide input to the workshop agenda.

Pre-Work Communication Plan

Step 1. Registration *1 month ahead*

The registration web page contained a description of webinar, a link to the white paper and a heads-up that there would be pre-work and consequences for not doing it. In this scenario, the consequence was that the person would be deferred to a future session if the pre-work was not done. <http://www.facilitate.com/webinars.html>

Step 2. Welcome *Same day*

People who submitted the registration form received a personal email (i.e., not computer generated one) welcoming them and informing them that details on pre-work would follow shortly.

Step 3. Detailed Instructions *2 weeks ahead*

Two weeks before the webinar, a detailed email is sent out to each registrant with instructions about the pre-work assignment. The participant was requested to acknowledge receipt by return email.

Step 4. Monitoring, Reminders, Interaction *One week ahead*

As much of the pre-work was on-line, it was possible to monitor who was doing it. One week before the session, a reminder email was sent to those who had not yet signed on to the online work space. A read receipt was requested.

Step 5. Decision time *3 days ahead*

3 days before the webinar, the facilitator picked up the phone and called the registrant. The message contained both encouragement to get the work done and an offer to the registrant to withdraw from this event and sign up for a future session.

Step 6. Final Details *Day before*

The day before the session, a personal email was sent to each participant who had completed the pre-work with a welcome message and instructions on accessing the webinar. For those who did not complete the pre-work, an email was sent informing them that they had been removed from that session's roster and were invited to sign up for a future event.

In this scenario, phone calls were used encourage laggards. In another situation, the personal phone call might be a reward for completing the pre-work and a way for the facilitator to create a connection with each participant in advance of the session.

Because of expected fall-out, the facilitator registered up to 30 people for the 20 slots. In this type of webinar we might expect 10-12 to lag in their pre-work, 5-6 to voluntarily de-select themselves, 2-3 to complete after the personal phone call and 3-4 to be disinvited.

A final word

Pre-work is always a choice – you can do it or not, you can do it fully or not, you can do it with full attention or not... However, how you are invited to the party may depend on how you choose to show up.

We invite you to share your ideas on how to make pre-work more compelling. Please go to [our blog](#) to add your comments.

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