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How to collaborate more effectively:
Best practices for online workshop facilitation

Introduction to IdeaClouds – digital workshops

Working with IdeaClouds is easy, self-explanatory and fast. The ideas behind IdeaClouds origin from **decades of creativity research**. As a result, most of the features already enable teams to achieve better results than in normal face-to-face meetings, video conferences or team calls.

If you further want to optimize your teamwork with IdeaClouds, we suggest tuning the following working context settings. **These recommendations based on research findings as well as our experience with other customers on the field**.

If you are interested in an online training in this field, feel free to contact us: workshops@ideaclouds.net

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Workshop scenarios

How to collaborate in a team?

Workshop scenarios for digital workshops

IdeaClouds can be used for **live, synchronous workshops (all participants work at the same time in real-time) or asynchronous workshops (all participants can enter the workshops when they want)**. While it is very convenient that users can participate whenever they want, it is good to know about the differences between the two before deciding your setup.
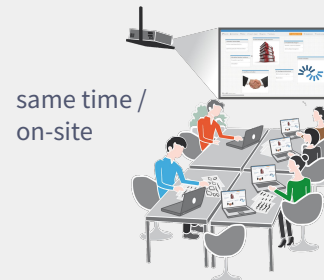
Scenario 1

same time /
cross-site

Scenario 2

different times /
cross-site

Scenario 3
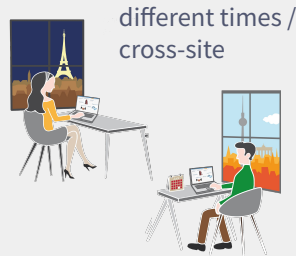
same time /
on-site

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# **S1: Synchronous cross-site collaboration at the same time**

Participants work in parallel on the IdeaClouds whiteboard to **get results in real-time**.

The majority of our customers use IdeaClouds **during video conferences or team calls**

- to collect ideas (e.g. feedback)
- to cluster ideas (e.g. responsibilities)
- to prioritize ideas (e.g. tasks)
- to discuss results based on a ranking or diagram
- to avoid documentation effort

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S2: Asynchronous cross-site collaboration at different times
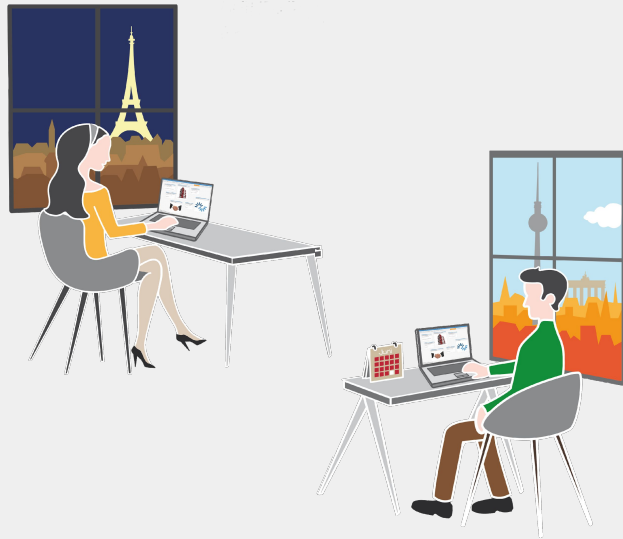
Participants work at different times on the IdeaClouds whiteboard. **This is recommended whenever they are in different time zones (e.g. Europe and USA)**.

The whiteboard remains open until the facilitator starts the evaluation phase or ends the workshop.

Tipp: The participants should press the orange button "Task completed" on the whiteboard when they are done with the task. So the facilitator can see at a glance, who is done and who is not.

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S3: Synchronous on-site collaboration at the same time

Participants meet **in a conference room** and work at the same time on the IdeaClouds whiteboard.

Optionally, the facilitator can **use a beamer** to explain how to use IdeaClouds to the participants.

Important: Each participant should use his own notebook to participate in the workshop.

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Team size

How many participants?

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Team size for digital workshops

As in normal face-to-face meeting scenarios, large teams suffer from social loafing/free-riding (so called "Social Loafing" or Ringelmann effect). In short: **the bigger the team, the less the single participants will contribute**.

If possible, keep your teams small during teamwork (e.g. idea generation). For F2F meetings we recommend a team size of < 7 members. In IdeaClouds you should try to **avoid teams with more than 10 participants for best performance**.

Since sometimes you really need more people to participate in IdeaClouds also more than 10 team members are allowed. As an alternative to a very large audience, you may **split it up into smaller teams** and several workshops. Create an own workshop for each team (team A, team B, team C). You can control all workshops in parallel by opening them in different tabs of your browser. If required, you can **import the contributions of all teams in a new workshop afterward**.

For asynchronous teamwork, you can invite up to 20 participants because they may work at different times on the whiteboard (**please see table on next slide**).

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Synchronous or asynchronous?

	Synchronous workshops same time / cross-site or on-site	Asynchronous workshops different times /cross-site
Duration	Short (~1 hour)	Long (~days)
Participation	More	Less
Facilitation effort	High	Low
Scheduling	Time slot required	Flexible participation
Reminders during workshop	Not required	Required
Best team size	< 10	< 20
Appropriate teamwork techniques (e.g. Brainstorming)	All	1-phase-techniques

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Communication

How to communicate during workshops?

Communication during digital workshops

Very likely users want to start synchronous IdeaClouds workshops in parallel with video conferences or team calls to coordinate the session. It is very important that you **avoid audio communication during the workshops** as it is responsible for the so-called "production blocking" effect. This leads to poor performance during creative phases.

- Participants should use audio communication during synchronous workshops for questions about the topic or the usage of the tool only (before or after the workshop). They also can **use the IdeaClouds chat** during the workshop.

- The facilitator can **use audio communication for coordinating the workshop**. For instance, to communicate the remaining time or giving hints and instructions. Nevertheless, also facilitators should **reduce audio communication to a minimum while on the IdeaClouds whiteboard and during evaluation**.

- The **discussion should take place after the digital workshop is completed**, e.g. on the workshop result page where all participants can read the unbiased results of the workshop.

- We recommend **turning off the video** during the workshop to avoid zoom fatigue.

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Topic

How to choose and formulate the right topic?

Choose and formulate the right topic

Choose a topic that is relevant for all participants (also for trial workshops!). Formulate a **clear problem statement** where people can immediately contribute without the necessity to ask questions for understanding. **Try to formulate the topic as a question**:

?

- How can we improve… ?
- What are the success factors for… ?
- What should we do next for… ?
- What measures are necessary to… ?
- How can we reduce our costs for… ?
- Which topics are important for?

Don't: Avoid topics/problem statements such as "Next activities", "Brainstorming" where further communication is required.

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Agenda

How to structure digital workshops?

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Agenda of a typical IdeaClouds workshop (1 hour)

1. **Introduction (10 minutes)**: The facilitator gives a short introduction to the workshop topic.

2. **Onboarding (5 minutes)**: The facilitator gives a short introduction to IdeaClouds.

3. **Brainstorming (5 minutes)**: Participants <u>silently</u> note down their ideas on the whiteboard.

4. **Q&A (10 minutes)**: Participants can ask/answer comprehension questions about the ideas.

5. **Grouping (5 minutes)**: Participants group duplicates and related ideas.

6. **Clustering (5 minutes)**: Participants categorize the ideas.

7. **Evaluation (5 minutes)**: Participants <u>silently</u> evaluate the ideas (5min).

8. **Discussion (10 minutes)**: Participants discuss the results based on the IdeaClouds ranking.

9. **Check-out (5 minutes)**: Download workshop results or start a follow-up workshop

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Methods & techniques

What method / technique should I use?

Integrated teamwork and evaluation techniques

Integrated teamwork techniques:

- Brainstorming (to collect ideas, topics, suggestions…)

- Kanban (to assign and organize tasks / todos)

- Retrospective (e.g. for lessons learned workshops: What should we start doing? What should we stop doing? What should we keep doing?)

- Business model canvas (to generate a Business model)

- Random word technique (to generate innovative ideas e.g. for events or service innovation)

- Provocation technique (to generate ideas for improvements, e.g. processes, products and services)

Integrated evaluation techniques:

- Pros and cons

- SWOT analysis (Strengths, Weaknesses, Opportunities, Threats)

- Importance (prioritize e.g. ideas, todos, topics)

- Effort in person days (estimate effort)

- Creativity and feasibility

- Yes or No (for voting)

- Complexity (SCRUM Poker) (estimate effort for implementation of deliverables, user stories or tasks)

- Business value and feasibility

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Contact us!

Do you want to conduct highly effective online workshops with your colleagues, partners or customers?

Do not hesitate to contact us:

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