

# The remote engagement playbook.



Does “death by powerpoint” sound familiar?

Have you ever attended a meeting and thought “why am I here?”

The Remote Engagement Playbook is the first step to ensuring the way you engage with your audience captures and keeps their attention. Look out for our try it now tips which empower you to bring your audience on a journey that opens up their minds and leaves them excited to be part of the story.

It's time to rediscover remote engagement.

## The basics.

Before we look at tips and tricks to increase engagement let's take a moment to review the basics. No matter if your session is in person or remote, it's important to prepare and follow-up, as well as delivering the session itself. This playbook looks at what we can do before, during, and after the session to increase engagement.

01

### **Before.**

Before your session starts, remember: spend some time preparing, take small steps, and use what you've got.

02

### **During.**

During the session, speak the audiences language, capture and keep their attention, and show empathy and curiosity throughout.

03

### **After.**

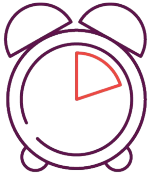
After the session, it's important to offer thanks, take a moment to reflect, create transparency on next steps, and commit to actions.

**"Every adversity  
contains, at the  
same time, a seed  
of equivalent  
opportunity."**

**NAPOLEAN HILL**

# Challenges.

When we spoke with a series of Business Analysts and members of the business community, we consistently found the same five challenges arising when delivering and attending remote sessions.



## **Not enough time.**

Attendees and facilitators barely have the time to put together or pre-read content, let alone do something new.



## **Too many tools.**

With so many options for collaboration and storing information which is right for the job?



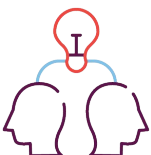
## **A disengaged audience.**

We all have our own communication and learning styles. What works for one may not work for another yet, somehow, the presenter must cater for all.



## **Too many distractions.**

Mobile devices with push notifications, working from home, and busy lives all lead to instant diversions, so how do we capture and keep attention?



## **We all work differently.**

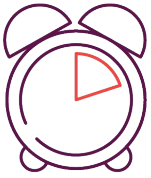
At both individual and team levels, we all have our own ways of working which can cause friction and conflict in remote sessions. A common remote working challenge is that some people don't like having their video on whilst others find it rude not to. There is no right answer, so we must acknowledge the challenge and find a way to navigate past it.

**"Just try new things. Don't be afraid. Step out of your comfort zones and soar."**

**MICHELLE OBAMA**

# Opportunities.

It's time to start flipping the question to "How might we...?" Whenever we see a challenge, reframe it as an opportunity, for example "I don't have enough time..." becomes "how might I make enough time?"



## **Not enough time *so take small steps.***

Take small steps and build your confidence. If it's a new tool, start by using it for small interactions. If it's a new way of presenting, try one new idea at a time in a safe space. Try changing just one slide, or finding just one story to tell at the start of your session.



## **Too many tools *so use what you've got.***

Many of us are familiar with Microsoft products, some with Google. Rather than jumping to the latest new shiny toy, get creative with what you already have. The capabilities of these tools, like co-authoring, might surprise you.



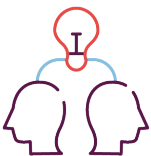
## **A disengaged audience *so speak their language.***

There is an abundance of research and techniques that we can apply to understand our audience and speak their language in minutes. Do they say, "I think...", "I can see...", or "I feel..."? The language they use tell us how the person communicates and learns.



## **Too many distractions *so capture and keep their attention.***

Tell a story. As children we all learnt how to tell stories, so rediscover how to tell yours. Remember that every good story has a bit of drama and audience participation is always a winner. Anybody remember pantomime? "He's behind you!"



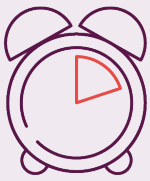
## **We all work differently *so show empathy and curiosity.***

We must empathise and listen for these nuances to remove any friction and create a safe space. Diversity of ideas and ways of working is a key source of innovation so be clear on how you work and show curiosity and empathy in the ways that others do. Don't be afraid to say "I like to ... and from previous experience I understand that this isn't for everyone."

# Approach: before.



Before your session starts, remember to spend some time preparing, take small steps, and use what you've got. This is a moment where you can really challenge yourself to try something new, so next time you start designing a slide deck, take an extra minute to ask yourself, "how could I make this a more interactive experience for my audience?"



## Take small steps

Preparation is key, so start with small changes and try not to change your entire style/format in one go. Remember to ask your close colleagues for support and there is great free content online so don't feel you need to start from scratch.

## Try it...

- ❑ Change your opening slide;
- ❑ Add an image slide with no words which provokes a thought or question;
- ❑ Practice telling a 30 - 60 second story that's relevant. Start on your own and say it out loud.



## Use what you've got

Look at the tools that are commonly used by those around you and consider how to make them more collaborative. If you're using a tool like Powerpoint 365 then use the co-authoring featuring to encourage participation.

## Try it...

- ❑ Enable your audience to interact with the presentation;
- ❑ Create sticky notes in the presentation and add sticky dots for voting options;
- ❑ Dedicate entire slides to thought provoking statements & questions.



## Prepare

Simplifying the presentation and sending out invites is one part of preparation. Mentally preparing yourself, visualising the scenarios of how the session will go will support you during the presentation.

## Try it...

- ❑ Do a practice run with your colleague/co-host;
- ❑ Write down five challenges you foresee and how you'll overcome them;
- ❑ Find ways to keep it simple and concise by working to timings.

# Approach: during.



During the session it's important to remember to remain calm and control your breathing. As you run through your session speak the audiences language, capture and keep their attention, whilst showing empathy and curiosity throughout. Above all be confident, be authentic and if things don't go to plan it's just another useful lesson to remember.

## Speak their language



People receive information in different ways. One person's "think of" is another person's "picture this" which is another person's "have a go at". Use a variety of styles and language to share information.

## Try it...

- ❑ Drawing on screen, live and in front of an audience can be scary, try starting with pre-made interactive diagrams;
- ❑ Find a metaphor and give it a go;
- ❑ Find ways to ask your audience to share their thoughts visually.

## Capture and keep their attention

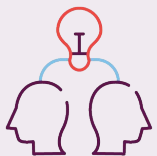


Storytelling is an art form, one that our children excel at. Take a leaf from their storybook and draw upon your life experience to share a short story with your audience.

## Try it...

- ❑ On your own, practice telling any story, off the cuff, out loud;
- ❑ Pick a theme that runs through your presentation;
- ❑ Find out "what's in it for them" and refer back to it.

## Show empathy and curiosity



Teams form their own ways of working, use this to find out what works for them and integrate it into your sessions. When you're engaging multiple teams, find out their needs, encourage ideas, and create a safe space to talk.

## Try it...

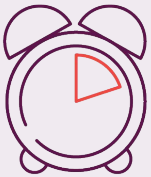
- ❑ Write down or ask what the team brings and how they operate;
- ❑ Search for similarities between the teams eg. "no one likes paperwork". Draw upon the common themes to generate a safe space during the session.



# Approach: after.



A lot of creating a safe space and ensuring people feel valued is done before and after the session. After the session it's important to offer thanks, take a moment to reflect, create transparency on next steps, and commit to actions. Following the four steps below will build confidence ahead of the next session, team members may even start transferring the tools and techniques into their own work.



## Offer thanks

Both immediately after and in any follow up communication, open and close with a specific thank you.

### Try it...

- ❑ When you say thank you, make it genuine and reference something the individual said, did, or even didn't do.



## Reflect

Take a moment to consider how the new approach went, probing for strengths and weaknesses with a view to improving next time.

### Try it...

- ❑ At the end of the session, write down one thing you'd keep, change, and remove from the session;
- ❑ Ask your colleagues to do the same.



## Create transparency

The journey continues after the session even though it's easy to finish up and think it's complete. Be open and honest about what next with people including timescales.

### Try it...

- ❑ After your next meeting write up bullet points with actions and send them out.
- ❑ If you want to go a step further shared progress and make editable for the owners.



## Commit to actions

Delivering an interactive session that doesn't lead anywhere is still far from ideal. Ensure people see their time turning into real value by following up on the actions.

### Try it...

- ❑ Set a reminder to give everyone a progress update a few days after the meeting.
- ❑ Track the actions and decisions, sharing them ahead of further sessions.

# The playbook on a page.

01

## **Before.**

- Take small steps;
- Use what you've got;
- Prepare.

02

## **During.**

- Speak their language;**
- Capture and keep their attention;**
- Show empathy and curiosity.**

03

## **After.**

- Offer thanks;
- Reflect;
- Create transparency;
- Commit to actions.

**"What good is an idea if it remains an idea? Try. Experiment. Iterate. Fail. Try again."**

**SIMON SINEK**

# A remote engagement story.

Have you ever been in, or hosted, a meeting where people are disengaged?

Recently, when working from home, Hank pitched one hundred thousand pounds worth of investment to three decision-makers:



Pru the Planner



Fabi the forgetful



Simon the Skeptic

Standing there in front of his computer screen, presenting to these “supreme beings”, Hank pulled himself together to deliver a very acceptable, maybe even technically great, presentation. Sound familiar?

As the session continued, Pru repeatedly asked “How is this all working with my plan?” Fabi would ask the same question several times over and, if he showed any interest, Simon would occasionally raise an eyebrow and challenge entire ideas.

Hank noticed and continued his presentation as planned. The session done, the feedback positive. Hank waited...

Hank waited a day...

Hank waited a week...

Hank waited a month and Hank never received the investment. So why didn't the investment ever happen?

After some reflection Hank came to the conclusion, like many before him, that Pru, Fabi, and Don didn't believe in, or connect with, the idea. Pru couldn't figure out how this coincided with her plans, Fabi couldn't grasp the ideas, and Simon just wasn't sure about the hard facts behind the investment.

Hank took three lessons from that day:

1. For Pru the Planner - before the session, find out her priorities.
2. For Fabi the Forgetful - during the session, speak her language.
3. For Simon the Skeptic - after the session, follow up and commit to actions.

Who knows if the decision would have gone his way but, by taking on board these three lessons, Hank decided that, next time, he'd focus on engagement.

**"I cannot teach  
anybody anything.  
I can only make  
them think."**

**SOCRATES**

# Supporting material.

## **How great leaders inspire actions**

by Simon Sinek  
[Youtube video](#) (18 mins)

Simon Sinek is already renowned so why not give it a go. When watching, observe the use of repetition and thought provoking style.

## **How to become a master of the art of public speaking**

by Eric Edmeades  
[Youtube video](#) (90 mins)

Eric focuses on engaging your audience providing provides us with a masterclass on timing, storytelling and engagement.

## **Rediscovering interactive engagement**

by Redvespa  
[Redvespa Insights Site](#)

A set of practical tips and tricks to change your standard presentation into a fully interactive remote session.

## **Lightning Decision Jam**

by AJ&Smart  
[AJSmart Website](#)

Ideally for those with Mural/Miro, this approach can take the biggest of challenges and convert them to immediate actions in just one hour. The ideal model for engaging workshops.

## **Agile meets Design Thinking**

by Univ. of Virginia  
[Coursera link](#)

This free, four week course is a little off-beat, however getting into personas and problem scenarios (weeks 2 & 3) provide great techniques for understanding your audience.

## **Disrupting Business with Design thinking**

By Redvespa  
[Redvespa Booklet](#)

Are you brave enough to give Lego a go during your meeting? This handy booklet provides a range of ideas and approaches to create an engaging and innovative atmosphere.

## **How to avoid death by Powerpoint**

By David JP Phillips  
[Youtube video](#) (20 mins)

Are you a culprit or victim of death by powerpoints? Find out if you are and five easy tips to help yourself

## **Facilitating introverts**

By Janice Thomson  
[Blog Article](#) (10 mins)

How to setup your meeting to support Introverts, giving real practical advice on how to start and run the session.

