

Launching a Next Gen Partnership in a Virtual Environment

While there is no substitute for face-to-face meetings, we've all learned in the last few months that a lot can get done in a well-facilitated virtual meeting. With the right prep, process, and plan, a virtual launch meeting can be highly effective. This document spells out tips and strategies for making your launch a success.

Review: Goals of A Launch Meeting

- **To build relationships among business leaders.** Foster peer-to-peer connections among a critical mass of business leaders, helping them understand that they share common challenges and that there is “strengthen in numbers” in addressing them.
- **To identify shared priorities for action.** Clarify priorities for action that the group agrees: 1) are important, and; 2) that they believe they can have an impact on if they work together.
- **To secure commitment around next steps.** Identify industry champions to form Action Teams around each priority for action. These Action Teams will define next steps in each area.

Build Relationships Among Business Leaders

In-Person	Virtual
<ul style="list-style-type: none">• Conduct targeted outreach to ensure strong day-of turnout (goal of at least 25)• Target senior-decision makers, focusing on individuals who are passionate about both their industry and community.• Work with industry champions in advance to build the invitation list, encourage the right people to attend, and prep them for playing a constructive role throughout the discussion, encouraging participation and commitment.	<p>All the same strategies as an in-person meeting, plus:</p> <ul style="list-style-type: none">• Double down on targeted outreach. Personal phone calls go a long way! Divide them up among your support team members to make the calls manageable.• Keep the virtual launch meeting to no more than 90 minutes. People tend to be reluctant to commit to a virtual meeting longer than 90-minutes.• Do even more prep with industry champions. At minimum, hold individual phone calls to each champion to brief them on the launch meeting and review invitation list together, coupled with one group discussion with champions together to prepare for the launch.• Limit public partner participation to a minimum. It is more difficult to differentiate public partner from industry leaders in a virtual environment. Even if they are in listen-only mode, public partners' presence can take away from the peer-to-peer feel. Limit public partner participation to no more than five (even fewer if you expect less than 25 businesses). A recording of the meeting is always an option to share with a broader group.



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Identify Shared Priorities for Action

In-Person	Virtual
<ul style="list-style-type: none">Use cards and a “sticky wall” or large (5”x8”) post-it notes to invite ideas from the group and then categorize them on the wall. Re-arrange as you facilitate the discussion to discern shared priorities. These will form the basis of action teams.	<ul style="list-style-type: none">Use a screen share as a focal point for discussion (PowerPoint template or Word document with categories to capture ideas).Ask participants to take a few minutes to write down their top two ideas, then call on each person to read one of those ideas to the full group. Once everyone has had an opportunity to have their idea recorded, open it up for group discussion. Chances are that many participants’ second ideas have been already recorded, so the discussion can focus on noting similarities and deepening the understanding of group priorities.

Secure Commitments Around Next Steps

In-Person	Virtual
<ul style="list-style-type: none">Close the meeting by asking business leaders to “sign up” for one or more action team (e.g., writing their name on a card and posting it on one of our sticky blue walls).	<ul style="list-style-type: none">Call on individuals one-by-one to commit as champions—and record their names in front of the whole group to publicly reinforce their commitment.If time is short, use the chat box to invite commitments. Call on those who did not chime in via chat.



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Top Tips for Next Gen Virtual Meetings

- 1. Keep it simple—and normalize how new this is for people.** To be honest, we are all still getting used to virtual environments. Remember, people come to these meetings with sometimes very different levels of experience with technology, not to mention varying degrees of bandwidth reliability. Pick the most user-friendly option that will still meet your discussion and document-sharing goals. Be clear at the beginning that we are all working through this new approach together, so please be patient. And, encourage people to speak up if they are having any technical difficulties.
- 2. Create a focal point for discussion.** Typically, we use our sticky “blue wall” as the focal point for discussion, capturing and organizing ideas, and helping the group see how their ideas connect and roll up into shared priorities. Applying the same principle in a virtual environment, we have used a PowerPoint template with categories to capture ideas, as well as an existing action plan document with blank areas to be filled in during the discussion, enabling the facilitator to keep the group focused on their shared product.
- 3. Make it a team effort.** For the Next Gen launch meetings and action team sessions we have done, it has been very helpful to have someone act as recorder and someone else act as facilitator/synthesizer. In these situations, recording doesn’t mean trying to write down every word; it means listening and recording key words, then working with the facilitator to group and name similar ideas. It also doesn’t mean “writing by committee,” which can grind your meeting to a halt, but rather accurately reflecting the essence of the discussion and the shared priorities that result. If you are concerned you might miss some key comments, make an audio recording of the meeting to review later.
- 4. Virtual breakout rooms can help you manage a large group.** In our Next Gen training sessions and conference calls, we have used virtual breakout rooms to divide larger groups into smaller teams, providing much more opportunity for highly-interactive discussion. The Northern Colorado Health Care Partnership also reports successfully using this approach, organizing breakouts by theme, asking someone in each group to take notes, and going over a set of Rules for Interacting so participants knew they were expected to actively contribute and encouraged to use the chat box.



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Top Tips for Next Gen Virtual Meetings cont.

- 5. It can be harder to manage interruptions in virtual environments.** When we conduct in-person Next Gen meetings, if a public partner interrupts a business champion, we can address the issue immediately, face-to-face. In a virtual environment, it is sometimes more difficult to identify who is speaking, and we have experienced (and heard from others) that such disruptions have been damaging to the flow of the meeting, and the active participation of business champions. It is important to make the ground rules clear and to know who is participating in the meeting so you can intervene if necessary. Another strategy is to only invite business champions, but record the meeting and make it available afterward to public partners, perhaps with a live debriefing session.
- 6. Especially with a larger group, ask for everyone's top idea first, then open it up for discussion.** An important part of a successful Next Gen meeting is to ensure all business champions are heard and engaged, not just those who are most vocal. We often ask participants to write on cards so as to ensure that everyone gets an equal chance to submit their ideas. To simulate this in a virtual environment, ask participants to take a few minutes to write down their top two ideas, then call on each person to read one of those ideas to the full group. Once everyone has had an opportunity to have their idea recorded, open it up for group discussion. Chances are that many participants' second ideas have been already recorded, so the discussion can focus on noting similarities and deepening the understanding of group priorities.
- 7. Virtual meetings can still produce committed champions.** Next Gen processes are champion-driven, and we have found that even in virtual environments, we can ask people to make commitments to action. In face-to-face meetings, we ask people to make a tangible commitment in front of their peers (e.g., writing their name on a card and posting it on one of our sticky blue walls). In a virtual environment, even though people are not in the same physical space, we can still call on them one-by-one to commit as champions—and record their names in front of the whole group to publicly reinforce their commitment.

