



# Dalberg Design

Remote Creative Facilitation Primer





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# What is remote creative facilitation?



# What is Remote Creative Facilitation (RCF)?

**The way we work is changing.** The teams we are part of and the partners we collaborate with are increasingly international, with projects typically involving contributors from across the globe. Feelings of disconnection are only amplified as the COVID-19 pandemic and climate emergency limits our ability to travel and meet those we work with.

Yet the need for creative collaboration has never been greater; **solving complex challenges in business and society increasingly requires an interdisciplinary approach.** A broad range of skills and perspectives must be mobilized, with the subsequent dialogue framed, synthesized, and actioned in a way that is both compelling and accurate.

Digital tools, such as video conferencing and collaborative documents, present an opportunity for teams and partners to creatively collaborate despite being remote from each other. However, to be successful, we must understand what these tools can do, and when and how to use them.

**Remote Creative Facilitation (RCF) is the practice of enabling people to create things together without being in the same room.**

For the purpose of this Guide, it **applies to the range of activities to remotely execute a workshop using creative activities and methods.** We'll also provide tips on how the same processes and principles can be applied to other types of remote creative facilitation (e.g. collaborative documents, project kick-offs, brainstorming sessions, check-ins) and frequent activities (e.g. Theory of Change, co-creation, business modeling).

**We recognize this may be new to most people.** While some of us have participated in creative facilitation, most haven't done it remotely. We recognize this might be a daunting prospect, particularly for client and partner workshops when stakes are high.

The tools and approach in this Guide draw on best practices from in-person creative facilitation while recognizing the technical and behavioral constraints and opportunities that inform the way we communicate via digital channels. We're presenting content in a format that we hope is accessible and anchored to the different use cases you're likely to face.

Finally, we've included information on **how best to engage Dalberg Design** to support you on your RCF journey.

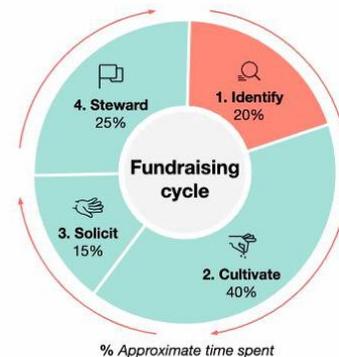


## The Fundraising Cycle

Identify - researching potential funders

### Tools and channels

- **Build a database**
- **Leverage existing tools**
  - Examples include DonorSearch, Double the Donation, Intellect space, Matching Gift Widget (more details and links on additional resources slide).
- **Create visibility**



**Remote Creative Facilitation (RCF) is the practice of enabling people to create things together without being in the same room.**

# Principles for remote creative facilitation

*Remote creative facilitation (RCF) can be quite different from in-person facilitation. Even if you are an experienced facilitator, there is a learning curve for facilitating remotely.*

*We've identified some principles to help you get in the right frame of mind. We've learned these the hard way so you don't have to!*

## Build connections before a remote workshop

Open-mindedness, connection, and playfulness are all important ingredients in creativity. Workshop participants won't contribute their best ideas if they're scared of getting shot down. Cultivate relationships with co-facilitators, the client, and other participants before the workshop (perhaps via video calls) and allow time for introductions. Connecting before a workshop is a good opportunity to hear the interests and perspectives of participants, which can help you during facilitation, particularly when you might need to fill in moments of silence.

## Create a safe digital space

Similar to in-person facilitation, take measures to create a safe space during online workshops. Time spent on ice-breakers, warm-ups, casual chats and developing workshop norms will payoff as subsequent discussions and activities are likely to be more lively. In addition, make sure all participant contributions get some kind of response (verbal, written, gestural), even in disagreement, thereby encouraging future contributions.

## Budget time and team generously

RCF leans heavily on digital tools for each step in the process. Buffer time estimates for learning to use new tools, training your team, preparing tools and materials and executing the agenda. You may also need a larger team of facilitators than typical to ensure active engagement in all of your remote breakout.

## Prioritize outcomes over details

Like with in-person workshops, the agenda is irrelevant if it doesn't lead to the right outcomes. Effective facilitation requires flexibility to move agenda items around depending on the momentum and focus of participants. Think ahead about which agenda items are crucial (and which can be sacrificed), as well as scenarios in which the sequencing will need to change.

## Understanding and setting norms

Silence on a call tends to be detrimental to the group's energy. But at the same time, you want to allow participants time to reflect. Where possible, spend some time at the beginning of the workshop setting norms for the session, from how and when to jump in to turning off other computer applications. Also, given not everyone feels comfortable speaking up on calls, prepare content to fill the gaps and keep momentum going when the silence is really... silence.

## Audio and video connection is paramount

So many conference calls fail because of poor connectivity and tools that require more bandwidth than is available. Try out the technology before the workshop, then elect to use what is likely to be the lowest effort to adopt and use. If you're asking participants to install and use new software, support and incentivize them to do that before the workshop (avoiding lost time and momentum in the workshop). Prioritize human connection and collaboration first, then add helpful tools like a digital whiteboard.

## Know your tools

Most digital facilitation tools may be new to you, from Zoom breakout rooms to Mural post-it boards. Learn and practice how to use them outside of the workshop so live facilitation and data capture runs smoothly. The same applies for your co-facilitators and participants.

## Accommodate different levels of digital literacy

Not all participants will have the same level of digital literacy, and many will be less comfortable integrating new tools on the fly. Adapt tools to the participants and you seek to reach, and consider offering ways for participants to engage without having to use the tools themselves.

# Getting into the right mindset



## Think digital-first

You may have strong in-person facilitation skills, but this will only get you so far as you transition to digital-enabled remote workshops. **Think about how digital tools influence dialogue, collaboration, and outcomes differently than being in person.**



## Preparation takes longer

**Many of the tasks to set up for a remote and digitally-enabled workshop will take longer than in person**, from setting up the relevant tools to training co-facilitators and participants to use them.



## Choose appropriate tools for the context

Data and WiFi accessibility, connection quality and comfort with trying new digital tools can vary greatly. **Do your homework about who the participants are and where they're located and adjust your digital tools accordingly.**



## People behave differently online

For some people, giving a presentation to a screen is off-putting. For others, home is a safe space which naturally relaxes them. **Recognize people behave differently on video calls, and take steps to make participants feel comfortable and included.**



## Get personal

It's harder to communicate remotely than in person. You won't be able to read body language and tone as clearly. **Be intentional about getting to know co-facilitators and participants ahead of time, which will help the conversation flow.**



## Over-communicating is good communicating

People miss things sent to them via digital channels. **Don't be afraid to over-communicate in preparation and delivery of the workshop** (e.g. sending an agenda via email, embedding it in the invite, presenting it as a slide during the workshop).



## Workshops are spaces to be creative

Workshops are not normally the place to go deep into analysis or make a formal decision. They're spaces for participants to be creative, which often means being playful and taking risks. **Create an atmosphere that supports creativity, from limiting information on slides to encouraging discussion.**



## Be patient with yourself and others

A lot of the tools and technology will be new to you and others. **Recognize that everything might not go as planned and learn from it when it doesn't. Your confidence will grow the more you facilitate remote workshops; be gracious to yourself and your team as you learn.**

02



# How do we do remote creative facilitation at Dalberg?



# Process overview

*The before, during and after of creative facilitation*

While there can be many ways of planning, structuring and working towards a workshop, we think of the process in three phases. These are:

1. Planning and preparation
2. Facilitation (i.e. the actual workshop)
3. Post-facilitation follow-up

In this section, we'll take you through each of these phases in detail and give you a sense of what you should consider as you work towards your goals. Along the way, we'll provide some tools and tips that can help to kick start this process for you.



PLANNING & PREPARATION

**The success of remote creative facilitation is heavily dependent on the planning and preparation that has gone into it.** This is especially true for a remote workshop where your participants might be dispersed across the world, unfamiliar with the tools you might be using and where the infrastructure that enables remote connection might vary across the participants.



FACILITATION

**The primary goal of any remote creative facilitation session should be to get every participant to focus on a group of select themes, share their thoughts and experiences and then collectively define a path forward.** Facilitation should enable participants to remain focussed on the tasks at hand without getting derailed by challenges of everyone being remote.



POST-FACILITATION FOLLOW-UP

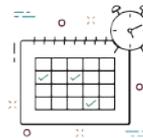
**A remote facilitation session should not end when the last participant signs out.** The core team should use the inputs captured during a session and convert them into easily digestible, actionable outputs that are shared with everyone involved and helps move a shared vision forward.

# Planning & preparation



## Align on goals

Get everyone, from the clients to the members of core team, to agree to the goals of the remote creative facilitation session.



## Prepare an agenda

Divide the session into smaller presentations, activities and discussion that makes effective use of the available time



## Form & prepare your team

Assign clear roles and responsibilities to every team member



## Design activities & tools

Create the tools and materials that you will need for the session



## Do a dry run

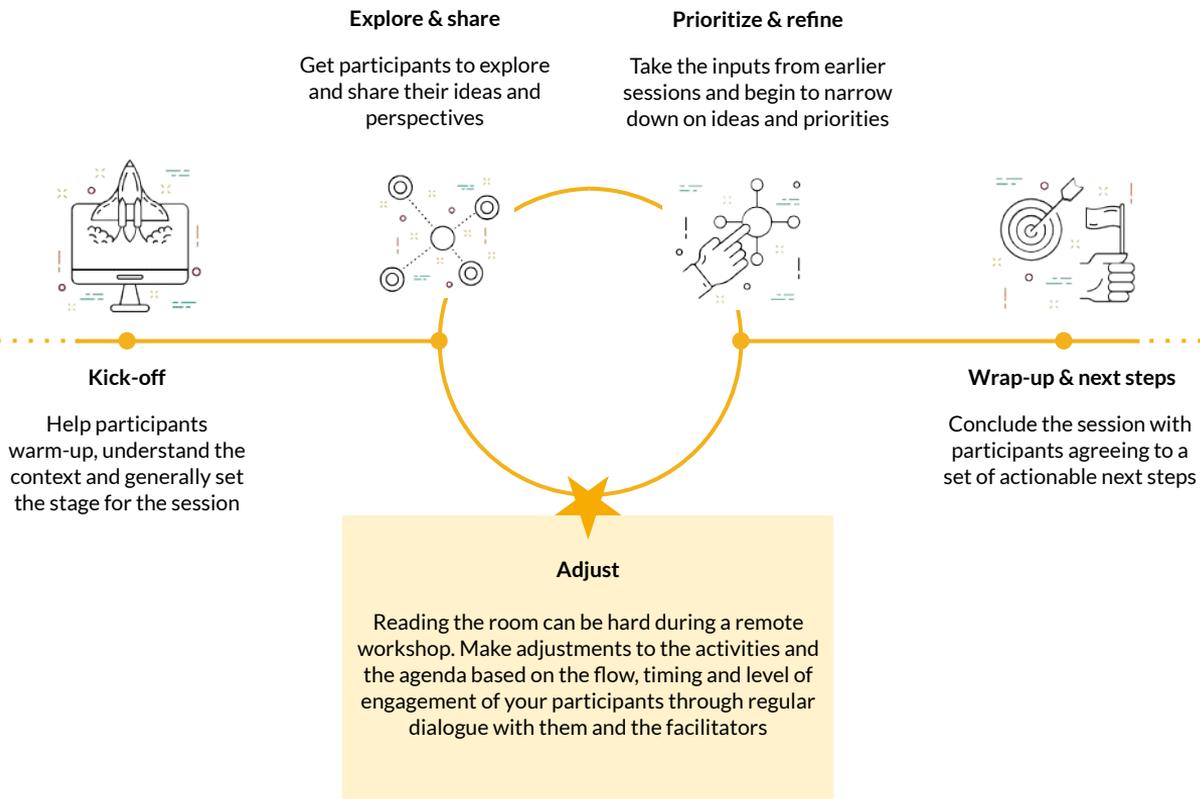
Get your team together for a final test run through all the various sessions of your planned session



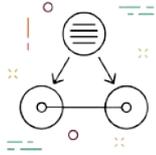
## Get your participants ready

Get your participants prepared and excited to join the session and feel committed to getting stuff done

# Facilitation



# Post-facilitation follow up



## Synthesize workshop findings

Take learnings from the remote session and convert them into actionable insights



## Create workshop outputs

Capture key learnings and insights in a format that helps future decision making



## Share outputs

Share outputs including key learnings and insights with participants, stakeholders and clients

# Summary of Process & Tools



## PLANNING & PREPARATION

### Align on goals

- Make sure the entire team has a clear, shared understanding of its goals and outcomes
- *Tool: What's on your radar?*

### Prepare an agenda

- An agenda will help use the time people are online more efficiently
- *Tool: Workshop agenda template*

### Form & prepare your team

- Remote facilitation requires greater upfront effort
- The essential roles for a workshop include: a main facilitator, a notetaker and tech support

### Design activities & tools

- Thoughtfully design the activities, tools and templates to support your agenda

### Do a dry run

- Do a dry run to test the digital tools used & familiarize the facilitators with their roles
- *Tool: Logistics checklist*

### Get your participants ready

- Send out a pre-workshop email to participants
- *Tool: Workshop email template*



## FACILITATION

### Kick-off

- Set the tone of your workshop, provide context and an outline of objectives
- *Tool: Icebreakers*

### Explore & share

- Maximize the range of inputs and ideas you get from your participants
- *Tool: Personas activity*
- *Tool: Journey Map activity*
- *Tool: Theory of Change activity*
- *Tool: Business Model Canvas*
- *Tool: Brainstorming Canvas*
- *Tool: Concept Canvas*
- *Tool: Storyboard activity*

### Prioritize & refine

- Prioritize the ideas from the the previous stage to move towards a point of convergence
- *Tool: Decision Matrix*
- *Tool: Prioritization Matrix*
- *Tool: Concept Poster*

### Wrap-up & next steps

- Define a roadmap and get commitment on a shared vision and action plan
- *Tool: Roadmap*
- *Tool: Commitment Document*
- *Tool: Workshop Data Capture*



## POST-FACILITATION FOLLOW-UP

### Synthesize workshop findings

- Distill the learnings into well defined next steps and outputs.
- *Tool: Affinity Mapping*

### Create workshop outputs

- Leave participants with genuine sense of accomplishment.
- Create an output that meaningfully captures everyone's perspectives
- Offer participants an opportunity to refine and validate the emergent insights and learnings

### Share outputs

- Share outputs from a workshop as a way of thanking your participants

03



# Dalberg's remote creative facilitation case studies



# Facebook Community Leadership Program

Capacity-building and advising for global community leaders (6 months)

An integrated team from Dalberg Advisors and Design partnered with Facebook in the design and implementation of its inaugural Community Leadership Program, which was created to support the organizational sustainability of select community groups. **5 Dalberg team members across 4 continents provided training and advisory support to 75 community leaders** (across 6 continents) over 6 months. Aside from 1 event with community leaders and 2 client meetings, **our interactions were completely remote.**

Each Dalberg team member supported 10-20 community leaders across a variety of needs, from financial modeling to emotional support to developing a Theory of Change. We first engaged with each community leader 1-on-1 (using Skype, Zoom, Whatsapp, and facebook messenger) to build rapport and better understand their aspirations, motivations, barriers, and needs. As a team, we then shared insights as they came (using Slack) and synthesized them on a weekly basis (using Skype and google docs) to **a) develop a curriculum of 15, highly tailored training sessions** for the community leaders,

**b) improve how we were conducting our training and advising,** and **c) improve how we were working together** as a project team. We also **leveraged our remote-first approach even further** through “peer-led trainings”; we created a **guide, a toolkit, and a training session** to support community leaders in developing and delivering their own online trainings (using facebook Live, Zoom and BlueJeans).

As a team, we have reflected on how the mostly remote setup worked so well. For most of the community leaders, connecting virtually was second nature. On occasion, it was challenging to build a strong rapport based on remote-only interaction, but we tried to improve this by **using a combination of tools and methods** (short pulse-check texts, impromptu and scheduled calls, emails for more technical communication, etc.) and **iterating along the way.** For our project team, we established norms like: **communicating early, often, and transparently** across the full project team; **video-on calls**; defining and also **revisiting responsibilities** and work streams; demonstrating curiosity and **care for each other beyond the project work.**

*“We train leaders who never thought that they could lead – we were able to increase and improve our delivery of content. The training that I received from FCLP and transmitted to my group has been really impactful for them. It’s been life-changing for everybody.”*

Gerianne, Military Mama Network  
(Facebook Community Leader)



(Above) Snapshot from a tailored workshop

**DURATION**  
6 months

**PARTICIPANTS**  
~15

**ACTIVITIES**  
~15

## DIGITAL TOOLS

Skype, Zoom, Whatsapp, Bluejeans, Facebook, Facebook Messenger, Facebook Live, Google Suite

## OUTCOMES

A curriculum of 15 highly tailored training sessions and a training toolkit for participants to create their own online trainings.

# Lagos Business School

Customer Centred Design and The Human Account Capacity Building (3 months)

An integrated team from Dalberg Advisors, Design, and Research partnered with The Lagos Business School (LBS) to design a training curriculum as part of a train the trainer model. The training was delivered to LBS in the form of **3 toolkits, 20+ tools, and 9 days of online training sessions, with 18 participants**, and the entire project was delivered over 3 months.

This curriculum focused on three major topics: Customer-Centric Design, The Human Account Nigeria, and how drive engagement and capacity-building across the Financial Service Providers (FSP) ecosystem using these processes and tools. The aim was to build internal capacity within LBS to drive continued engagement across FSPs in Nigeria.

Initially, we were planning to deliver in-person training sessions in Lagos. Once the severity of COVID-19 became apparent, we had to rethink our approach. We used a combination of the **Google Drive Suite and Mural** to develop hyperlinked playbooks, tools, and other materials that allowed us to create and share an interconnected universe of knowledge. Also, it allowed us to provide "digital canvases" where facilitators and participants develop content live.

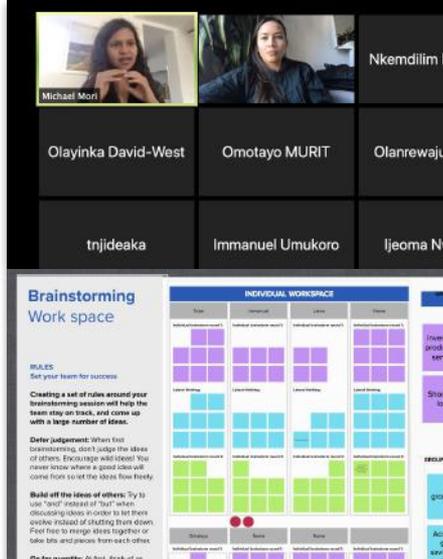
**Zoom** and the **break out rooms** feature were a vital element for training delivery. It allowed us to convene big groups when delivering theory and break out participants into teams when putting theory into practice.

We learned:

- **Online tool and activity familiarization demands more time.** Participants are not only trying to understand what they need to do but how to use the presented online tools to do so.

- **Online workshops and trainings need a bigger pool of facilitators.** Adding extra guest speakers and facilitators to a session allows content to feel more dynamic and for participants' brains to stay engaged.

- **For online sessions, materials and tools need to be designed with easy navigation and wayfinding in mind.** Provide an intro email to your participants before the training introducing them to the assets they will interact with and where they can find them. Also, design trackers and guides within all your materials to reference time, location, and elements being used.



## Brainstorming

### Work space

#### RULES

Set your team learn for success

Creating a set of rules around your brainstorming session will help the team stay on track, and come up with a large number of ideas.

**Defer judgement:** When first brainstorming, don't judge the ideas of others. Encourage wild ideas! Stay focused on the issue at hand and come up with ideas from your own perspective.

**Build off the ideas of others:** Try to use "and" instead of "but" when discussing ideas in order to get more creative instead of shutting them down. Feel free to merge ideas together or take bits and pieces from each other.

**Go for quantity:** All that counts is the number of ideas.



(Above) Snapshot from a training module

(Below) Ideation canvas allowed participants to develop and share ideas in real-time

"I actually really think that this being remote was good. It forced us all to sit here for the day and really focus, and each of us was able to practice the exercise."

Prof Ajai  
LBS training participant

## DURATION

3 months

## PARTICIPANTS

~18

## ACTIVITIES

~20

## DIGITAL TOOLS

Google Suite, Mural, Zoom (including break out rooms)

## OUTCOMES

The team designed and delivered 9 days of training curriculum as a part of the train the trainer model to build LBS's internal capacity

# Freedom Fund

## The Freedom Rising Program

*Designing a leadership curriculum for frontline workers combating modern slavery (6 months)*

**The Approach.** This was the second workshop convening a broad range of experts to develop a leadership curriculum for frontline workers combating modern slavery covering themes such as gender, caste, survivorship, and resilience. Once the severity of COVID-19 became clear, we adapted our plans to deliver a remote workshop. We initially filtered our invitee list to be much narrower than a traditional workshop to ensure greater engagement per participant. We also shortened the amount of time (5 hours) and spread this over two days to avoid fatigue, and then adapted our previous agenda accordingly.

**The Tools.** We used **Menti** to gather quick, anonymised reactions, which were often supplemented with a round of verbal reflections. We used **Stormboard** to clearly segregate inputs. We used **Zoom breakout rooms** for deeper engagement, and **Google Slides** to create content live with experts.

### The Learnings:

- **Dial back your expectations:** It takes longer for people to warm up on a virtual workshop so plan to cover less content
- **Where possible, allow participants to trial applications with you beforehand.** Handholding works better than pre-reads and written instructions, or allowing time for glitches during the workshop
- **Assign dedicated members for tasks** like screensharing, setting up the online tool, operating Zoom, etc. for a smooth run
- **Bring experts along the journey of co-creation** by sharing your screen or using visual tools like Menti to demonstrate how input is being counted and valued
- **Use simple tools to create detailed input.** We abandoned an exercise initially meant on Stormboard in favour of putting up input on behalf of some experts; the rest sent their inputs via email after the workshop

The image shows a Menti poll and a Stormboard interface. The Menti poll asks "How are we feeling?" with three options: "I feel resilient to deal with the COVID-19 lockdown today", "I feel optimistic about the workshop progress so far", and "I feel ready to go deep into the day-by-day residential flow". The Stormboard shows inputs from participants, including feedback on leadership styles and organizational culture.

	REMOVE	MODIFY
Residential 1	#7 in K and F could be reviewed R1: Knowing -2&3 + feeling -2	res 1 - 1/3/4/7 (knowing) + 1/4/5 (feeling) better to move leadership style/values from R2 to here advancing social change in org, etc. better suited in R3 as focused on org more clarity
Residential 2	#7 in K and F could be reviewed R2 - 6	except 3, keep all (K) + R1 - learning: 1, 4, 5, 6 feeling - 1,4,5 res 2 - 1/2/4/7 (knowing) + 1/4/5 (feeling) 4 from feeling to res 3 we need to promote learning in R3 - feeling from R2 to R3 point 5 from R3 to move to R2 (com survivor leadership) more organizational stuff in R1 and R2 and movement stuff in R2 and R3

(Above) Snapshot from a 'welfare check-in' at the beginning of Day 2 of the workshop that helped participants anonymously relay their feelings about Day 1

(Below) Stormboard allowed participants to watch their inputs captured in real-time

# Vodacom Tanzania

Developing an agriculture product roadmap (2 weeks)

Vodacom is the largest mobile network operator (MNO) in Tanzania, however - like other MNOs - only a small portion of their subscribers are farmers. MercyCorps AgriFin team sought Dalberg's help to both share learning from Safaricom's DigiFarm platform in Kenya and facilitate a workshop to develop their 2-year agriculture product roadmap.

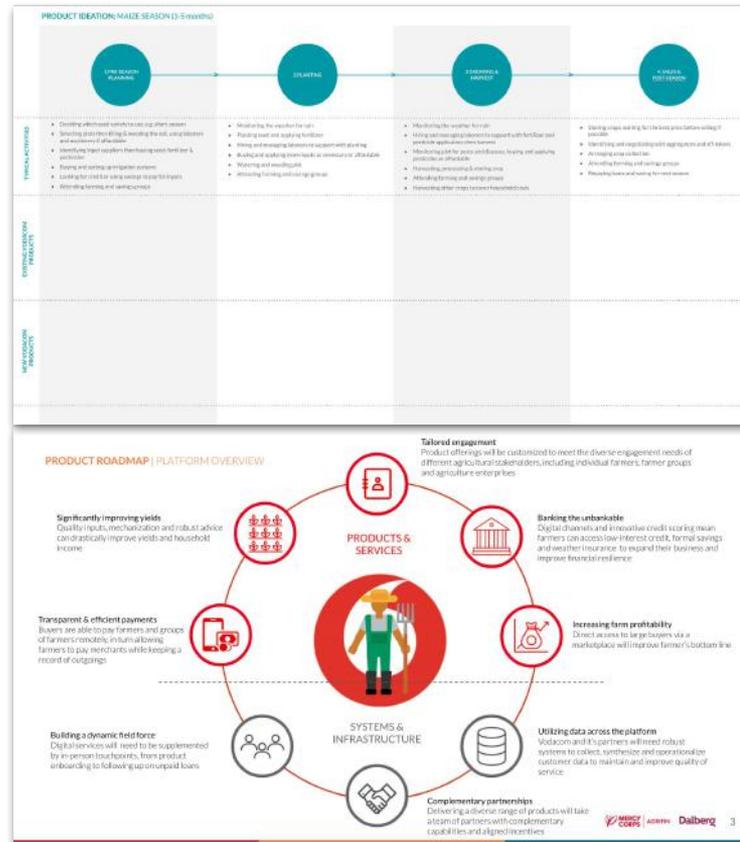
However the COVID-19 pandemic meant no members of the Design team were able to travel to the Vodacom office in Dar es Salaam. As an alternative, we trained a member of the MercyCorps team to facilitate the workshop while we dialed-in to answer any questions that came up. This ended up working really well, not least because the MercyCorps team had great knowledge of DigiFarm but also because we'd taken multiple steps to prepare and help them navigate the agenda and exercises.

After a call to align with the client on workshop aims, we prepared an agenda that

supported divergence in the groups' thinking through presentations as well as visioning and journey mapping exercises (right). We then planned to populate a product roadmap which would represent convergence on the group's thinking, bringing the session to conclusion (and providing the basis for the follow-up output).

We then walked the facilitator through the agenda and worksheets on two separate calls, and also created a presentation deck he could use which included detailed instructions for each of the exercises. He did a great job, even successfully moving the agenda around live as it transpired one key participant had to leave early to catch a flight.

We followed up the workshop with a short deck which gave background to what we were trying to achieve, presented the main conclusions, and provided a template for participants to add details to the roadmap.



(Above) A journey map worksheet which helped workshop participants map current and potential products to each stage of maize production. (Below) Example slide from the workshop follow-up deck which included both recommendations and a template for participants to complete the product roadmap



Pamela L via VChat



Holly M via VChat



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Malé MOD via VChat



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# Thank You!

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