virtual OW platform help for trainers

The virtual OW

Welcome to the trainer/host manual

Click inside the Table of Contents to see and access the (sub)sections.
Download a PDF copy of this document (with its Table of Contents).

What is the virtual OW platform?

The virtual OW platform is a set of integrated tools, documents and instructions allowing a certified OW trainer to deliver an OW entirely on-line:

- ensuring participants live a close immersive "seeing the system" experience as designed by Barry Oshry
- keeping all essential ingredients as close as possible to the original "in-person" OW

The benefits of the virtual OW platform are:

1. flexible and extensible design based on 2 modules (same day or not!) for the core "4 or 5 CCI days" OW: compatible with the attention patterns of participants in the virtual world
2. a safe process to (re-)allocate roles, for participants and in the support team, when anybody could disappear, willingly or unwillingly, into the Internet no/poor connection "black hole" without any warning
3. a mechanism to distribute role-specific support materials in the virtual space
4. a resilient system for money exchange for all transactions (Customers and Tops), for all real-time information needs (like Middles/Bottoms salaries) and for the production of deliverables by Bottoms teams

How do participants experience the virtual OW?

Participants in a virtual OW use 2 distinct software simultaneously:

1. a meeting platform for:
   - receiving instructions and OW strategic frameworks in webinar mode
   - participating to group interactions: TOOTs, debriefs, Q/A... in meeting mode
   - communicating with other participants in separate virtual rooms via audio, video and room chat
   - moving between virtual rooms
2. the work documents platform for:
   - CCI customers creating contracts and payments within their pre-assigned budget
   - CCI TOPS consulting customer payments and using available funds to pay salaries and bonuses
   - CCI BOTTOMS creating and presenting the deliverables for CCI customers on one shared PowerPoint document per team
   - CCI MIDDLES and BOTTOMS checking their remuneration

To understand better how to use the virtual OW as an OW trainer, you should first discover the real screens participants will use by following the walk through on our website.

Technical requirements

What meeting platform for the virtual OW?

Zoom is the recommended meeting platform as the virtual OW requires these features:

- Breakout rooms which enable small group meetings with video
- A large room where the host can “call back” all participants and where +/- 30 participants can see each other video

- **Movement capability**: some participants can see who is in which breakout room, and can move freely (without the assistance of the meeting host) between any of the breakout rooms
- Possibility to grant/suppress this **movement capability** to any participant (via the "co-host" status in Zoom)
- Easy editing by participants of their screen name (to make their OW role visible to all other participants)

> **Note**
>
> [For the virtual OW platform users] Zoom configuration and guide are in folder: MasterDocs\Administration

Why do we not recommend Microsoft Teams? As of early 2021:

- the base paradigm of Teams are conversations (not meetings like Zoom or Webex) and one must visit all conversations to which a user is registered to know in which conversation (s)he is currently present with video.
- it is unclear how to grant/suppress **movement capability** to participants.

Webex seems to be a viable alternative. As we have no experience with it, we do not provide any guidelines for its usage.

What are the requirements for participants?

1. Computer with speakers/microphone/camera on the Internet: PC with Windows 10 or Mac with OS 10.9 or later.
   No Android/IOS tablet or mobile phone!
2. Access to Zoom either:
   - via an Internet browser: one of the 2 last versions of Google Chrome (PC or Mac) or Microsoft Edge (PC). This browser will also provide access the the virtual OW document platform.
   - or via the installation of (or update to) the last version of Zoom Client for Meetings. And then also access to the virtual OW document platform via one of the 2 last versions of either Google Chrome / Safari / Firefox / Microsoft Edge

> **Warning**
>
> When delivering a virtual OW within a company, company-wide IT policies/configurations could block participant PCs to access the virtual OW!
>
> To anticipate this risk, conduct these tests/conversations BEFORE committing to the virtual OW delivery
>
> - Instruct to access Zoom **via an Internet browser** (without any downloaded program)
> - Ask your client contact to check that "Zoom via Internet browser" is OK and that they are no firewall restrictions to **access without login** to Google Docs and shared Powerpoints. You contact must be able to access these 2 links :
>   - Read access to this worksheet
>   - Read and Write access to this presentation : click first on "Edit in Browser" then write anything in it
> - explain to IT/security, if needed, that there are NO:
>   - downloaded programs
>   - login into Google Docs
>   - request for any email address

> **Note**
>
> [For the virtual OW platform users] Participant Zoom step-by-step access guides are in folder: MasterDocs\Administration

What are the requirements for the support team?

The support team has the same requirements as participants, with Zoom installed on their computer. Members of the support team need also a "back channel" between them to communicate without disturbing the participants: any chat based application, like WhatsApp, can be used.
Additional requirements are needed to ensure the support roles continuity.

> **Caution**
>
> As support team members will log into Google Docs to get access to their workshop(s), **they must first log out of all their other Google account(s)** to avoid access rights issues. To log out of all Google accounts: go to your Gmail and click your avatar in top right corner. Then select "Sign out" or "Sign out of all accounts"

The virtual OW platform for trainers

What are the virtual OW design characteristics?

2 core modules

To maximize participant engagement, we have designed the virtual OW in 2 core and 2 optional modules of 75 minutes to 3 hours each, which could be delivered together or over multiple days/weeks:

The “core OW” consists of Modules 2 and 3. Modules 1 and 4 are optional:

1. The first module "See The System" (+/- 75 minutes) is optional. It is a mini-OW to use when technology presents some important challenges for participants. It is also used when it is desirable for participants to have the experience of two different positions in the organization.
2. The second module "Understand Partnership Derailers" (180 minutes) covers the OW Transition-in, Days 1 & 2, and the first TOOT.
3. The third module "Create Partnership" (150 to 180 minutes) covers Days 3, 4 & 5, the second TOOT, and the

Transition-out.
4. The fourth module "Implement Transformation" guides participants in applying the insight of system forces towards implementing personal and/or organizational transformation (action plans).

Modules 2 and 3 together cover the first experiential exercise cycle of 5 days including all the strategic frameworks covered during the first day of the workshop in the Leader's Guide.

An example of a potential Module 4 is included in the reference documents with 2 sections built on the OW framework, one for a more organizationally oriented application and the second one for a more personally oriented application.

Scheduling these modules on different days allows to give participants homework: journaling, preparation, application...

Design differences with in-person OW

The key other design differences between the official OW Leader's Guide from powerandsystems.com and the virtual OW modules are:
- "Bottom shoes" are replaced with the freedom to move between virtual rooms. At the start of the 5 days, Bottoms are moved into their respective team work room and they cannot move. But customers, Tops and Middles can move freely between virtual rooms. From the second day onwards, Tops can decide to use some of CCI money to pay the Government to buy movement freedom for one (or more) Bottom(s).
- The "Side Show / Centre Ring" image is replaced by "Sidetracked / Centered"
- The strategic frameworks are delivered in a slightly different order to allow to give participants homework between modeles 2 and 3 to check the fit of their reality with "Sidetracked" and "How Come It Goes The Way It Usually Goes"
  - Module 2 delivers the following strategic frameworks after TOOT #1:
    - Sidetracked (Side Show) [but not yet Centered (Center Ring)]
    - How Come It Goes The Way It Usually Goes
  - Module 3 starts off from these strategic frameworks and asks participants to apply them beginning on day 3 of the experiential exercise:
    - Centered (Center Ring)
    - What Else Is Possible

What are the min./max. number of participants?

The virtual OW can distribute roles to minimum 10 and maximum 38 participants.

You can have 9 or 8 participants by assigning 1 or 2 customer roles to a member of the support team (or to their colleague(s)/business partner(s)) instead of 1 or 2 participant(s). We have run 2 virtual OW workshops with respectively 11 and 9 participants: in the virtual world the Top/Middle/Bottom/Customer contexts conditions worked very well with this small number of participants.

You can have more than 38 participants by distributing the same role to 2 participants who work then together: ideally in a Bottom team. We do not recommend to go too much above 35 participants to avoid risks of degrading their experience.

What are DEMO and PREMIUM workshops?

When you register for the virtual OW platform, you get access to your first workshop: the DEMO workshop with a name starting with "DEMO". In a DEMO workshop, all financial transactions executed by the OW customers (contracts and payments) or CCI TOPS (salaries, bonuses and BOTTOM promotions) are automatically reset to zero every hour. The DEMO workshop is fully functional for all other dimensions:
- creating/distributing role links and sharing the participants/roles list

- adapting role descriptions, allocating roles and sharing the role descriptions
- providing a global timer and real time sharing of pictures across all virtual rooms
- allowing up to 4 groups of participants to use a shared Google Slides file where they can create presentation together

So you can use your DEMO workshop for all your explorations / tests / rehearsals and to deliver workshops of your own design to as many participant groups as you want with as many consecutive sessions as you desire. When you need to deliver a virtual OW to "real clients" you can buy a PREMIUM workshop with a name which does not start with "DEMO":
- its financial data will not be reset to zero
- it will run only during 2 windows of 5 hours: one for module 2 and one for module 3
- its name includes the dates you have chosen to run module 2 and 3
- it uses PowerPoint - instead of Google Slides - to create shared presentations.

When you order a PREMIUM workshop, you must specify the start date/time of the two 5-hours windows where the PREMIUM workshop financial transactions will be operational: one for module 2 and one for module 3. Outside of these two 5-hours windows, the financial transactions will not work! To avoid any time zone confusion, **you must give these start date/time in the UTC time zone (Coordinated Universal Time)**:
- if you need to understand what UTC is, go here
- to go from your local time zone to UTC, you can use this meeting planner . Be careful with the date: it could be different in your time zone and the UTC time zone!
- please triple check: you are the only responsible if you make a mistake in the UTC date/time you give us for your 5-hours windows

Once you have your two UTC 5-hours windows (and the name of your vOW workspace), you can order the creation of a PREMIUM workshop here.

How do I access my vOW workspace for trainers?

You can order the creation of a virtual OW workspace with a DEMO workshop here.

Use this login link https://drive.google.com/drive/my-drive with the account ID and password you have received in your workspace creation confirmation email.

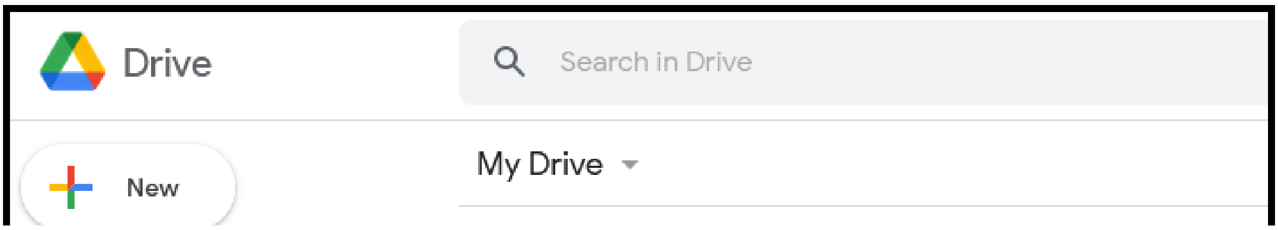
Caution

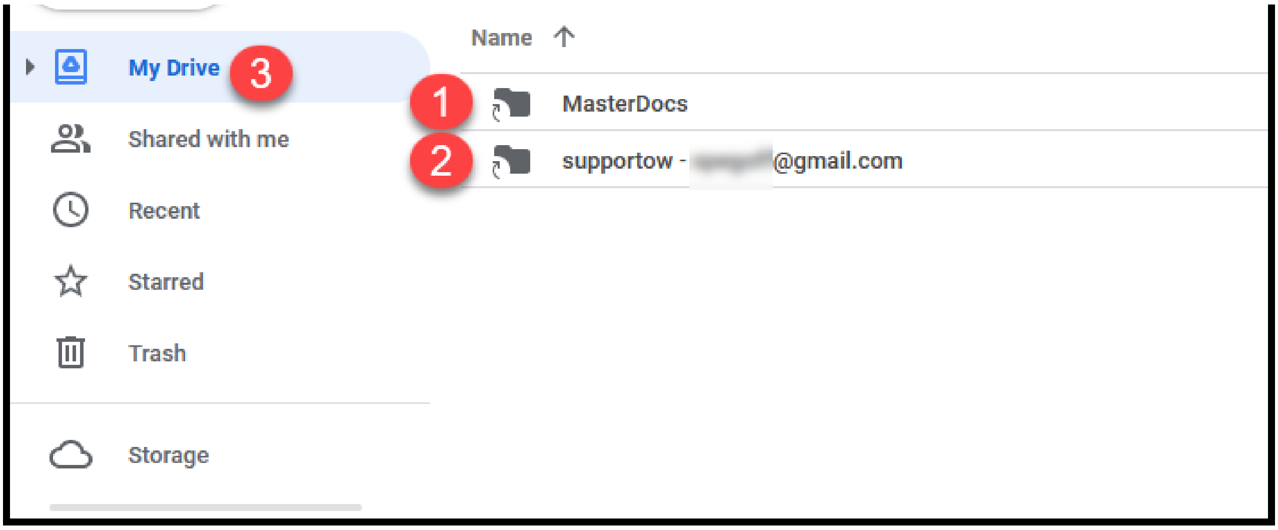
As support team members will log into Google Docs to get access to their workshop(s), **they must first log out of all their other Google account(s)** to avoid access rights issues. To log out of all Google accounts: go to your Gmail and click your avatar in top right corner. Then select "Sign out" or "Sign out of all accounts"

Warning

If you encounter any login problems, including a lost password, no need to contact us!
Google will help you solve it via your "recovery email": the email address you gave for communications about your use of the virtual OW.

After logging in, you will see your workspace in Google Drive:





1 the folder "MasterDocs" contains all the reference documents you can copy and adapt to deliver your workshops (just click on it to open it).

2 the workshop folder contains all your workshops and their files needed to run them (just click on it to open it). Its name has 2 parts separated by "-":

1. the first part of your account ID ("supportow" for ID "supportow@authentica.eu" in the example above)
2. the email address you gave for communications about your use of the virtual OW

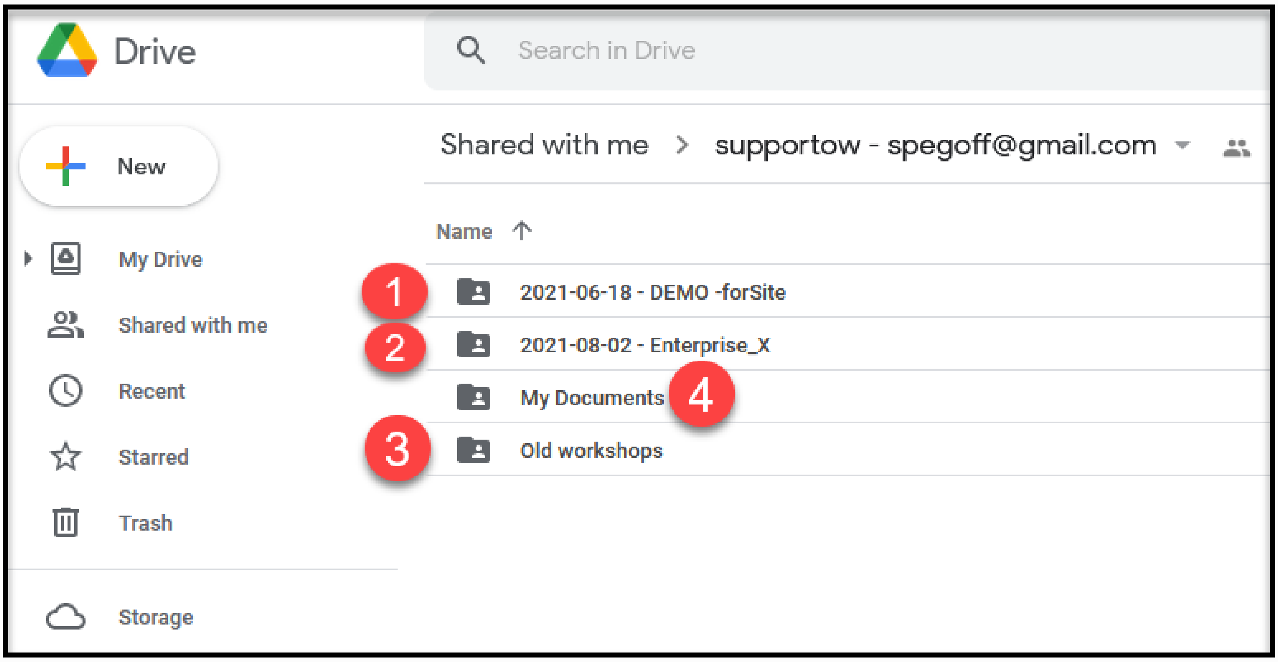
3 click here whenever you want to return to your workspace

Note

If you need help to get started with Google Drive, you can find it here.

What are my current workshops?

In your workshop folder, you will see the list of your workshops:



1 there is one folder with its name starting with "DEMO" (preceded by the date when it was created): this is your DEMO workshop.

2 there can be multiple folders with other names (not starting with DEMO): these are your PREMIUM

workshops. Their name is preceded by either:
- 2 dates: the date when you will run module 2 followed by the date when you will run module 3
- 1 date: the date when you will run both modules consecutively, followed by "x2"

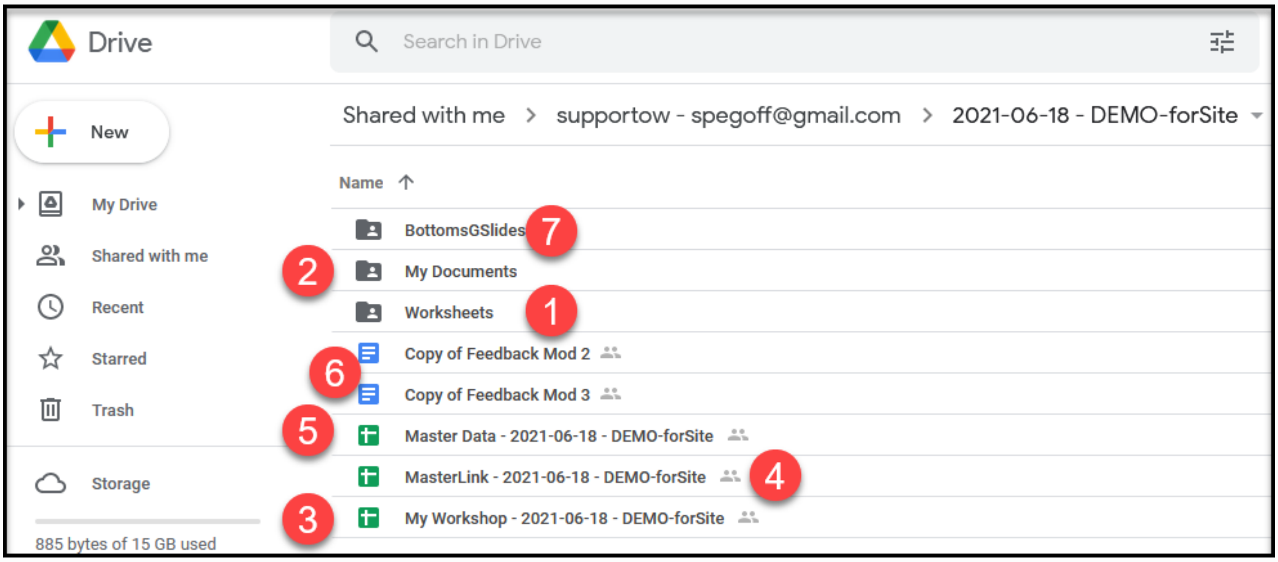
3 this folders contains all archived past PREMIUM workshops: they are not active any more.

4 there is also one folder "My Documents" which is not a workshop: this is where you can store the work files you have adapted and/or created

Just after the creation of your workspace, there will be only one workshop: the DEMO workshop.

What are the files in each workshop?

The DEMO and all active PREMIUM workshops have the same directories and structure. When you open one of them (just click on it), you will see:



1 "Worksheets" folder: used by the system, no reason for you to go there

2 "My Documents" folder: you can place inside this folder all your documents specific to this workshop

3 "My Workshop - ...": either
- "My Workshop - [date] - DEMOxxx" for a DEMO workshop
- "My Workshop - [date A] - [date B] - XXXX " for a PREMIUM workshop

This is the spreadsheet you (and members of your support team) will use to **manage the delivery** of a virtual OW module 2 or module 3

4 "MasterLink - ...": contains the links to the work documents specific to each OW roles (you can see these work documents on the participant walk through). These links are usually distributed to participants via the meeting platform chat.

5 "Master Data - ...": where you can see (but not change) all the data about the financial transactions during modules 2 and 3. These financial tables are usually shared with participants via screen sharing during the "transition out"

6 "Copy of Feedback Mod x": a document where all participant can write their feedback at the end of Module x

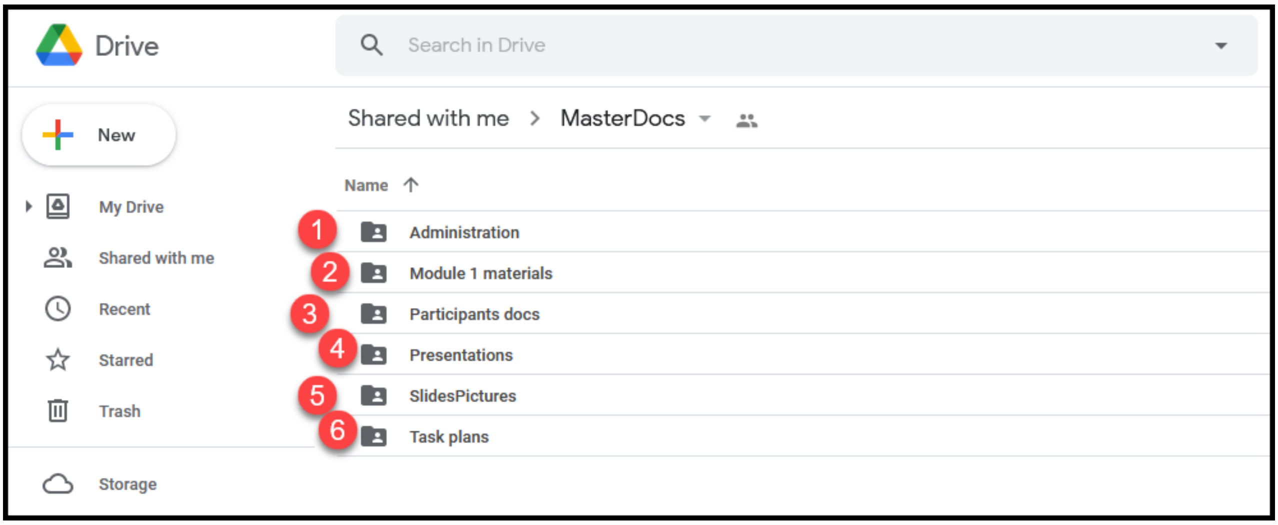
7 "BottomsGSlides": the Google Slides documents used by Bottom teams to prepare their deliverables to CCI

What are the reference documents?

Reference documents, all supporting documents useful to run a virtual OW, are in the "MasterDocs" folder:

- return to the top of your workspace by clicking on "My Drive" (left vertical menu)
- click on "MasterDocs" to open its folder

The reference documents are stored in these folders:



1. Administration: participant email template, description of participants system requirements, Zoom configuration and instructions
2. Module 1 materials: module 1 script and slides
3. Participants docs: **customer orientation script and video**, participant guide (extract of slides), OW reflection log, modules feedback document
4. Presentations: the PowerPoint presentations we use for modules 2, 3 and 4
5. SlidesPictures: images you can share across virtual rooms if your meeting platform does not have this feature (like Zoom as of early 2021)
6. Task plans: detailed task plans - from workshop check-up until workshop closing - to ensure error free coordination of all support roles for modules 2 and 3. The task plans are structured into sections: the same sections are used also to structure the PowerPoint presentations.

All reference documents are read-only. You can copy them to the top of your workspace ("My Drive" folder) where you can edit/rename the copy and then move it possibly to one of your "My Documents" folder. For handling Microsoft Office documents in Google workspace, we have prepared these recommendations.

Note

If you need help to use Google Drive, you can find it here.

Support team requirements

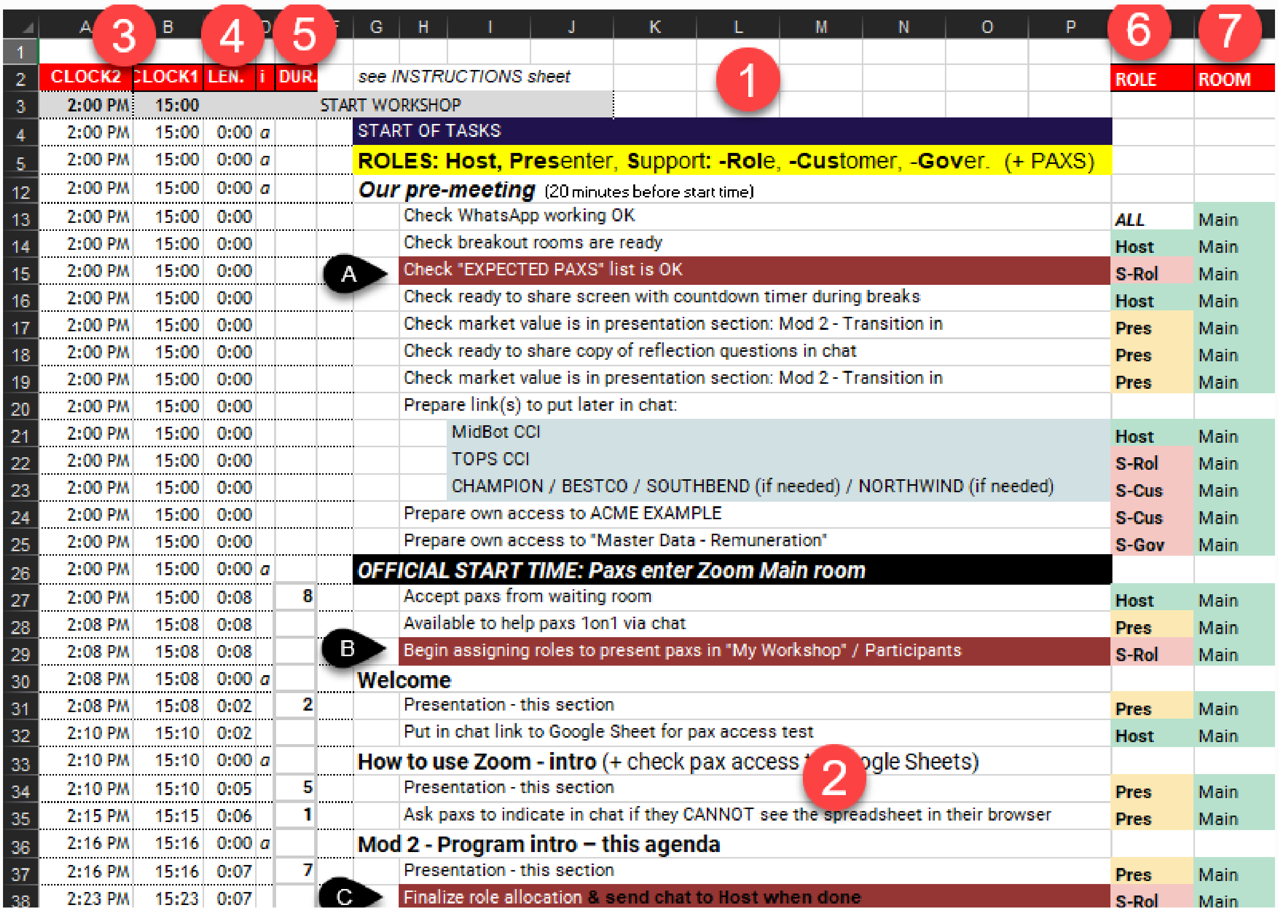
What are support roles responsibilities?

While experienced facilitators will readily deliver an in-person Organization Workshop alone (with minimal help from a client assistant), the virtual (on-line) version adds a layer of risk and complexity that is mostly outside the control of the facilitator - namely its reliance on information & communication technology. At the same time the virtual environment severely limits all non-verbal communication cues - for instance: participants disappearing or disengaging, or conversely trying to catch the facilitator's attention by raising their hand. These specific roles must be fulfilled in the support team:

- **Host** (or Technical Coordinator): The Host role corresponds to the Zoom Meeting host. The Host prepares the virtual breakout rooms, 'accepts' participants into the Zoom Meeting, grants participants co-host status (to enable movement between breakout groups), calls back all participants into the main meeting room at the end of the breakout sessions (OW days), etc.. The Host also helps all participants with any technical problems. The virtual OW Host should therefore remain as much as possible in a room accessible by all participants from inside and outside the meeting platform (the Main Room in Zoom).
- **Facilitator** (or Trainer): The virtual OW Facilitator delivers all the virtual OW materials (including instructions on how to use the meeting platform), gives all OW instructions to the participants (except customer training as indicated hereafter), manages time to ensure completion within the planned schedule, manages the TOOTs, monitors the chat during plenaries. In addition, this role helps the TOPS to understand and master their financial transactions during day 1. The Facilitator will therefore join the TOPS in their virtual breakout room as soon as the Transition-in is finished.
- **Support-Roles**: This role allocates the OW roles to the participants ahead of the Transition-in and provides access to each participant to their work documents.
- **Support-Customers**: During the second part of Transition-in and at the start of first OW day this role explains to Customers their role (Customer Orientation) and the use of their Customer work documents for projects/payments.
- **Support-Tops**: At the start of first OW day this role explains to Tops the use of their Tops work documents for tracking cash and remunerations.
- **Support-Government**: During all OW days, except the first one, this role answers any OW-related questions that participants may have, and checks that the payment for the promotion of Bottoms has been made before instructing the Host to promote them to co-host.

What are the detailed OW workshop role tasks?

Task plans - available in reference documents - describe all tasks (including breaks) by all roles (support team and participants) in sequence starting from the support team pre-meeting down to the end of module 2 or 3. A copy of the start of the task plan for **Module 2** is included here below:



	CLOCK2	CLOCK1	LEN.	i	DUR.	see INSTRUCTIONS sheet	ROLE	ROOM
3	2:00 PM	15:00				START WORKSHOP		
4	2:00 PM	15:00	0:00	a		START OF TASKS		
5	2:00 PM	15:00	0:00	a		**ROLES: Host, Pres**enter, **S**upport: **-Rol**e, **-Cust**omer, **-Gov**er. (+ PAXS)		
12	2:00 PM	15:00	0:00	a		***Our pre-meeting*** (20 minutes before start time)		
13	2:00 PM	15:00	0:00			Check WhatsApp working OK	*ALL*	Main
14	2:00 PM	15:00	0:00			Check breakout rooms are ready	Host	Main
15	2:00 PM	15:00	0:00			Check "EXPECTED PAXS" list is OK	S-Rol	Main
16	2:00 PM	15:00	0:00			Check ready to share screen with countdown timer during breaks	Host	Main
17	2:00 PM	15:00	0:00			Check market value is in presentation section: Mod 2 - Transition in	Pres	Main
18	2:00 PM	15:00	0:00			Check ready to share copy of reflection questions in chat	Pres	Main
19	2:00 PM	15:00	0:00			Check market value is in presentation section: Mod 2 - Transition in	Pres	Main
20	2:00 PM	15:00	0:00			Prepare link(s) to put later in chat:		
21	2:00 PM	15:00	0:00			MidBot CCI	Host	Main
22	2:00 PM	15:00	0:00			TOPS CCI	S-Rol	Main
23	2:00 PM	15:00	0:00			CHAMPION / BESTCO / SOUTHBEND (if needed) / NORTHWIND (if needed)	S-Cus	Main
24	2:00 PM	15:00	0:00			Prepare own access to ACME EXAMPLE	S-Cus	Main
25	2:00 PM	15:00	0:00			Prepare own access to "Master Data - Remuneration"	S-Gov	Main
26	2:00 PM	15:00	0:00	a		***OFFICIAL START TIME: Paxs enter Zoom Main room***		
27	2:00 PM	15:00	0:08		8	Accept paxs from waiting room	Host	Main
28	2:08 PM	15:08	0:08			Available to help paxs 1on1 via chat	Pres	Main
29	2:08 PM	15:08	0:08			Begin assigning roles to present paxs in "My Workshop" / Participants	S-Rol	Main
30	2:08 PM	15:08	0:00	a		**Welcome**		
31	2:08 PM	15:08	0:02		2	Presentation - this section	Pres	Main
32	2:10 PM	15:10	0:02			Put in chat link to Google Sheet for pax access test	Host	Main
33	2:10 PM	15:10	0:00	a		**How to use Zoom - intro** (+ check pax access t[illegible]ogle Sheets)		
34	2:10 PM	15:10	0:05		5	Presentation - this section	Pres	Main
35	2:15 PM	15:15	0:06		1	Ask paxs to indicate in chat if they CANNOT see the spreadsheet in their browser	Pres	Main
36	2:16 PM	15:16	0:00	a		**Mod 2 - Program intro – this agenda**		
37	2:16 PM	15:16	0:07		7	Presentation - this section	Pres	Main
38	2:23 PM	15:23	0:07			Finalize role allocation & send chat to Host when done	S-Rol	Main

39	2:23 PM	15:23	0:07			Wait for chat from S-Role then promote co-hosts: Cust. then Tops then Middles	Host	Main
40	2:23 PM	15:23	0:00	a		**Mod 2 - Roles allocation**		
41	2:23 PM	15:23	0:06	6		Presentation - this section	Pres	Main
42	2:29 PM	15:29	0:06		D	Takes over screen sharing to show "ROLE allocation" to everybody	S-Rol	Main
43	2:29 PM	15:29	0:10	4		Paxs change their names	PAXS	Main
44	2:33 PM	15:33	0:10			Host, Pres and S-Gov change their names		Main
45	2:33 PM	15:33	0:00	a		**Mod 2 - Transition in - all**		
46	2:33 PM	15:33	0:04	4		Presentation - this section	Pres	Main
47	2:37 PM	15:37	0:04		E	Put each custmer link in chat to each customer (2 to 4 times)	S-Cus	Main
48	2:37 PM	15:37	0:00	a		**How to use Zoom - Breakouts**		
49	2:37 PM	15:37	0:00			Prepare breakouts: no allocation, no timer, 1' warning	Host	Main
50	2:37 PM	15:37	0:01	1		Open breakout rooms: everybody remains in the Main room	Host	Main
51	2:38 PM	15:38	0:07	6		Presentation - this section	Pres	Main
52	2:44 PM	15:44	0:07		E	Put link TOPS CCI in 1to1 chat to each of the TOPS (3 to 5 times)	S-Rol	Main
53	2:44 PM	15:44	0:00	a		**Mod 2 - Transition in - Customers aside**		
54	2:44 PM	15:44	0:02	2		Presentation - this section -> Customers, go to TRAINING room	Pres	Main
55	2:46 PM	15:46	0:02			All **CUSTOMERS** move to the TRAINING room	PAXS	Main
56	2:46 PM	15:46	0:02			Customer support moves to the TRAINING breakout room to help customers	S-Cus	Main
57	2:46 PM	15:46	0:02			Give instructions and show ACME as example (1/2)	S-Cus	TRAINING
58	2:46 PM	15:46	0:02		E	***Wait for all customers are gone then put link "MidBot CCI" in chat to Everyone***	Host	Main
59	2:46 PM	15:46	0:07	5		Presentation - this section -> end	Pres	Main
60	2:51 PM	15:51	0:07			All **TOPS** and **Middles** CCI go to their respective rooms	PAXS	Main
61	2:51 PM	15:51	0:08	1		Send Bottoms 1by1 to their respective rooms	Host	Main
62	2:52 PM	15:52	0:00	a		**Day 1**		

1. List of sections, in bold, and detailed tasks within each section
2. Section names match section names in the Powerpoint presentations available in reference documents. The task "Presentation - this section" presents section "Welcome" from the Module 2 presentation.
3. CLOCK1 and CLOCK2: clock times in 2 different time zones. You can enter the start time on line 3.
4. LEN.: the elapsed time in the current section
5. DUR.: the planned duration, in minutes, of the task on the same line (line 40: participants changing their Zoom name is planned for 4 minutes). All tasks without a duration, considered as duration = 0 for the purpose of time calculations, are concurrent with the first preceding task that has a duration and are deemed to finish before that preceding task. (line 35: this task should be completed before the task on line 33 is finished)
6. Role: the role in the support team executing this task: see role descriptions. PAXS means participants.
7. Room: the virtual room where this task takes place.

These task plans are available in Excel format:

- "Mod 2 - 3h standalone - Excel task plan.xlsx" : module 2 standalone (not on the same day as module 3), 3h duration with breaks
- "Mod 3 - 3h standalone - Excel task plan.xlsx" : module 3 standalone (not on the same day as module 2), 3h duration with breaks
- "Mod 2 3 - 5h30m + pause - Excel task plan.xlsx" : modules 2 with module 3 on the same day, 5h30 total duration with breaks but excluding a long pause between the 2 modules

You can download these plans in Excel format and modify them:

- change the task durations in the DUR. column
- modify/insert/delete tasks (and sections) as indicated in the INSTRUCTIONS sheet of these task plans

What is the minimum support team size?

We recommend that you use initially a support team of 3 people to deliver the virtual OW. And once you have built some experience and you understand how to mitigate risks, you can move progressively to a support team of 3 people during the first hour and 2 people during the rest of the workshop:

- The Host must remain available and easily reachable throughout the entire workshop to both welcome participants at the start of the workshop and, more importantly, to be ready to help with technical problems or

with participants (re)joining on-going meetings in the right breakout room (e.g. in case they dropped out or accidentally left a meeting). The Host should therefore not take any other significant role. It is the only 'full-time' role even though this role may not always be active. **A first support team member** must be dedicated to the Host role.
- The Facilitator role is active throughout the entire workshop - except for the OW days. **A second support team member** must be dedicated to the Facilitator role.
- The Support-Roles is only active during the first half-hour of Module 2 (and Module 3 if not sequential) and could be done by an experienced Host.
- The Support-Customers role is active in parallel with the Facilitator and the Host roles during the second half-hour of Module 2 (and Module 3 if not sequential). So we need here **a third support team member**.
- The Support-Tops role is active only during the first OW day and could therefore be taken by the Facilitator.
- The Support-Government role is active only during the OW days 2 through 5 and could therefore be taken by the Facilitator.

What are the needed competences?

The competences and experience needed to fulfil each role are:

Role	Competences	Part.(2)
Host	**Deep knowledge of managing the meeting platform (1)** ; Tech-savvy (4)	1
Facilitator	Organization Workshop trainer certified by Power+Systems	
Support-Roles	Mastering the role allocation process	1
Support-Customers	Mastering the Customer Orientation (3)	1
3rd team member	Tech-savvy (4)	1

Notes:
(1) **Most critical competence to complement a typical certified OW facilitator**: the Zoom Host must be capable of executing easily all instructions of the "Zoom technical coordinator guide" in the Administration folder of the reference documents
(2) Minimum number of virtual OWs attended as participant
(3) Detailed script and example video for virtual OW customer orientation are in the reference documents: MasterDocs / Participant docs
(4) To help participants who encounter technical difficulties

What investment to learn to deliver the first virtual OW?

Once the support team with the right competencies is assembled, what investment is needed to learn to deliver the first client virtual OW?

Here is the list of activities and time needed by a 3 person team (2 certified OW facilitators and one confirmed Zoom producer) to go from "zero" to a succesful first PREMIUM workshop over a period of one week:

. Activity	Who	Hours(1)	Total(2)
The team lead facilitator attends the free 1 hour intro webinar (see support) and contracts team access and one PREMIUM workshop	team lead	3	3
All team members look through the materials (website + this document + reference documents), to get a feel for the work and the roles	all team	2	6
Team members (except the lead) attend the free 1 hour intro webinar or the recorded session (see support)	2 people	1	2

or the recorded session (see support)

. Activity	Who	Hours(1)	Total(2)
One facilitator studies the task plans and presentations (in reference documents) to create the detailed team plan/slides	facilitator	14	14
The team meets around the detailed team plan/slides to share learnings and prepare the rehearsal mini-workshop	all team	2	6
The team runs a rehearsal of the 2 first hours of module 2 with the original task plan/slides and with their detailed team plan/slides	all team	3	9
The team has a 1-hour Q/A session with a creator of the virtual OW (see support) to clarify all open questions/concerns	all team	1	3
The Zoom producer reviews the Zoom technical coordinator guide to prepare the client workshop	Zoom prod.	2	2
			45

Notes:
(1) Number of hours per person for this activity
(2) Total number of hours fort his activity

So the total time needed is 45 hours for a team of 3 people, with 11 hours for the Zoom producer and 34 hours to share between the 2 facilitators (with a minimum of 9 hours for the non-lead facilitator).

To reduce this time investment, you can buy support as indicated in the support page on the main website.

How to ensure support continuity?

The biggest impact on participants' experience of the virtual OW is likely to occur in the event that one or more support and/or participants' roles suddenly and unexpectedly 'disappear' (for more than a few minutes) in the course of the workshop - due to a serious technical problem with either computers or Internet connections, or due to participant drop-out.

Here are the different roles from greatest to least potential impact: (1) Host, Facilitator, and Support-Roles, (2) Support-Customers and any participant in Customer role, (3) Support-Government, (4) any participant in MIDDLE role and (5) any participant in TOPS or BOTTOM role.

We recommend thus the following risk mitigation measures:

- **For the support team**
  - Plan for a minimum of 3 people in a support team with limited experience, with the 3rd person taking not only the Support-Customers role and possible the Support-Roles role, but also on stand-by to jump into the Host or Facilitator role if one of these drops out of the virtual meeting.
  - All members of the support team should (MUST if only 2 people in the support team) have at their disposal 2 computers (main & backup) and 2 independent means of accessing the Internet (e.g. a cable Internet access via Wi-Fi or preferably wired LAN, and a backup access like 4G via a smart-phone). They must all avoid ANY operating system updates during any virtual OW sessions (for Windows 10: go to Windows Settings - Update & Security - Advanced Options - Pause updates)
- **For the participant drop-outs after role allocation**
  - It is difficult to detect when certain roles have dropped out. So It is IMPERATIVE to explain well in advance to participants - and ultimately to their management or training administrator or project leader ... - that they must commit to attending all sessions in their entirety. And that too many drop-outs could result in an entire module being cancelled, even after it has started.
  - Specific recommendations for role allocation in case of drop-outs are detailed in the role allocation process
- **For the participant technical set-up**
  - For participants within the same company, checking well in advance if IT policies/configurations would interfere with the virtual OW access

- All participants should receive instructions at least 2 weeks before the virtual OW sessions to configure their computer and test this configuration for access to the meeting and work document platforms.

Virtual OW preparation

How to design your workshop and adapt documents?

1. Understand the four modules design of the virtual OW in order to select your own chosen modules: at least modules 2 and 3.
2. Adapt the reference documents, usually presentations and task plans, to your design.
3. Assemble your support team ensuring that the required role competences are present and give them access to your virtual OW workspace.

Optional: How to change other workshop files?

If needed for your workshop, you can also modify other elements of the virtual OW:

1. the OW role instructions in file "My Workshop - ..." :
   - customer roles in tab "CustInstructions"
   - customer projects in tab "CustProjects"
   - CCI roles in tab "CCIinstructions"
2. if you want to share your own images across virtual rooms:
   - prepare your own image(s) in ".png" format and put it(them) into your folder "My Documents"
   - create a direct image link (URL) from Google Drive for each image as explained on this video
   - put the file name(s) and the image link(s) (URLs) in your file "My Workshop - ..." tab "ExeciseTimer" in the top part of the table with the other image names and links (delete some pre-existing ones if you need some space within that table)
3. If you want to share a document link across the virtual rooms:
   - prepare your own document(s) into your folder "My Documents"
   - put the file name(s) and the link(s) (URLs) in your file "My Workshop - ..." tab "ExeciseTimer" in the bottom part of the table with the other file names and links (delete some pre-existing ones if you need some space within that table)

What info to send to participants?

Once you have clarified the meeting platform and the technical requirements for participants, you can (ask your client contact to) send an email to all participants. You will find an email template, with annotations about possible attachments, in the Administration folder of the reference documents.

How to prepare the meeting configuration/breakouts?

You will find 2 documents in the Administration folder of the reference documents:

- the "Zoom technical coordinator guide" explains how to prepare the Zoom meeting, including breakout rooms
- the "Zoom configuration options" (as of 2021-03-20) indicates exactly which Zoom configuration options we are using in our virtual OWs

How to ensure a well coordinated support team?

The responsibilities, detailed tasks and competencies for all team members are described here.

Once a competent team is assembled, it is absolutely necessary to rehearse the first hour of module 2 (and module 3 if standalone) until every team member can easily execute his/her tasks as indicated in the task plans.

Virtual OW module delivery

Virtual OW module delivery

What is the pre-module check-list review?

We recommend that the support team starts its check-list review at least 20 minutes before the start of every module 2 or 3. This check-list is the section "Our pre-meeting" at the start of all task plans.

How to allocate roles to participants?

The role allocation process is highly automated and resilient towards participants drops:

- the overall configuration (number of: customers/PAXS per customer/Tops/PAXS in each Bottom team) is frozen 25 minutes after the module 2 session start based on the actual number of present participants
- after that, a the real number of participants can increase (max. 10%) or drop (max. 20%) without serious impact on the role configuration. In case of dropouts, the necessity to maintain some key roles for the Organization Workshop could force role distribution changes (see below)

The role allocation steps are listed here:

- the steps letter (A, B...) refer to the tasks with the same letters (white on black) in the task plan picture for module 2 available here.
- the **BOLD UPPER CASE TEXT** references elements in the spreadsheet "My Workshop - ...", tab Participants.

Step A - In the pre-meeting checklist.

S-Rol checks that the expected participant names are in the column **EXPECTED PAXS** in the "Participant" tab.

Step B - During the first 20 minutes of the session after participants start entering in Zoom

As participants enter the session, S-Rol indicates the present participants in column **PRESENT PAXS**, finalizes the **EXPECTED PAXS** column based on the best information available at that time and assign names in the **PRESENT PAXS** list to roles pre-assigned before the session. S-Rol can use 2 keyboard macros to facilitate these tasks:

.

- to rapidly record a new coming participant:
  1. Select the name of this participant in the **EXPECTED PAXS** list
  2. Type the keyboard combination Ctrl-Shift-Alt-1 or select the menu: Tools / Macros / MoveToPresent
  3. The name is copied into the first free cell in the **PRESENT PAXS** column. And the name is moved up in the **EXPECTED PAXS** list so that all participants which have not arrived yet are always in the bottom part of the **EXPECTED PAXS** list

- to exchange the roles of 2 participants in the **PRESENT PAXS** list:
  1. Select the range in the **PRESENT PAXS** list with one participant as the first name in this range and the other as the last name in the range
  2. Type this keyboard combination: Ctrl-Shift-Alt-2 or select the menu: Tools / Macros / SwapRoles
  3. The 2 names are exchanged in the **PRESENT PAXS** list and their roles are thus exchanged

Step C - 20 to maximum 25 minutes after the start of the session

Before showing their role to the participants, S-Rol MUST FIX the overall configuration for the rest of the session. Otherwise the roles could change randomly after being assigned! S-Rol must follow these steps:

1. Refresh the browser page to force a re-calculation of Google Sheets to ensure that all names are up to date
2. Click the yellow **"Final Config BUTTON "** on the top left. This will:
   - fix the configuration on the number of participants in the **PRESENT PAXS** list, and not anymore on the number of participants in the **EXPECTED PAXS** list.
   - copy this configuration to Master Data to finalize the number of customers and their budget

- copy this configuration to Master Data to finalize the number of customers and their budget
- freeze the **EXPECTED PAXS** column so that it cannot be changed anymore. This invalidates using anymore the keyboard combination Ctrl-Shift-Alt-1 or the menu: Tools / Macros / MoveToPresent.

3. Sends a message to the Host using the support team back-channel, so that the Host can begin co-host promotions

> **Note**
>
> The first time a team member clicks any button in "My Workshop - ...", he/she will need to authorize the script to run and then click the same button again!

Step D - When step C is completed AND the Presenter has explained to participants how to change their names in Zoom

S-Rol shows to participants their role by taking over screen sharing to show the table "Name - Role - ZOOM name" in the Participants tab of any Worksheet. Participants put then their OW role in front of their screen name following the instructions they just received from the Presenter.

Steps E (3 times) - After all participants have put their role in front of their Zoom name

S-Cus, S-Rol and the Host begin link distribution, as indicated in the task plan.
S-Rol can then make adjustments to **PRESENT PAXS** to reflect drop-outs and very late comers, as indicated in this section. They will be immediately visible to all participants in the Participants tab of their Worksheet.

If module 2 and 3 are on consecutive on the same day, just ask participants to remain logged in Zoom and to keep their work document open between module 2 and 3. Otherwise use the same process, starting from the role allocation created during module 2.

How to distribute links to participants work documents?

The links to participants worksheets are available in the "MasterLink - ..." spreadsheet and are distributed via the chat of the meeting platform:

- each customer receives his/her own link via one-to-one chat
- all Tops receive the same link, each via one-to-one chat
- all Middles and Bottoms receive the same link via chat to everyone

In Zoom (as of early 2021) chat can only be sent to people present in the same virtual room, so the links distribution is coordinated in the task plans with the actual presence of participants in the room where the sender role is present.

How to deal with latecomers/drop outs?

In case of (very) late newcomers, S-Rol can:

1. first use the remaining open roles in the role list
2. when they are no more roles available, just pair the newcomer with an existing role, preferably Bottom

And then in both cases:

- change the newcomer Zoom name
- if needed, ask the Host to give the newcomer co-host status
- distribute the corresponding role link to the newcomer
- if needed, ask the Host to move her to the corresponding Bottom room

In case of late drop outs, S-Rol should consult the Presenter before making any change. Here are some guidelines to avoid too complex role changes for participants:

avoid too complex role changes for participants:

- If one or two Customers drop out, a support team member should take over the role during the OW days.
- If a MIDDLE drops out, S-RoI should promotes a BOTTOM to MIDDLE role and ask the Host gives her/him co-host status.
- If BOTTOMS drop out to the point where a BOTTOMS team has only one member, S-RoI reallocates that BOTTOM to another team. (No Bottoms Teams should only have one member).
- If TOPS drops out to the point where there is only one TOP left, S-RoI promotes a BOTTOM to TOP and the Host gives her/him co-host status.

How to manage the timer and shared pictures?

On your file "My Workshop - ..." tab "ExeciseTimer", you can start a timer and/or share an image: they will (almost) immediately become visible to all participants in the "ExeciseTimer" tab of their worksheet.

- to share an image, select it in the menu "SELECT PICTURE" one of the image files listed in the table below the menu. If you need your own pictures, you should have prepared them before the workshop
- to start the timer:
  1. prepare the time in minutes under "ENTER TIMER DURATION" and hit Enter
  2. launch the timer by clicking on the button "Start Timer"

> **Note**
>
> The first time a team member clicks any button in "My Workshop - ...", he/she will need to authorize the script to run and then click again!

How to share final financial results?

To share final financial results, open the "Master Data - ..." and share your screen in the meeting platform on:

- the tab "financesCCI" to see customer projects and payments
- the tab "RemunerationsCCI" to see:
  - the distribution of salaries, bonuses
  - which Bottoms have been promoted to be able to move freely between virtual rooms

How to collect feedback (or other info)?

The easy way is to use the meeting platform chat and/or white boarding feature if present.

For more structured questions, you can easily prepare a Google Workspace document (text or spreadsheet) where all participants can write at the same time. You can then distribute a link to this document via the meeting platform chat.

If you need to distribute such a link to participants scattered in different virtual rooms without overall chat, you can use the "SELECT DOCUMENT" menu to share a document link. You will find there 2 simple feedback documents you can use at the end of module 2 and 3.

If you need your own document(s) and its link, you should have prepared them before the workshop.

Annexes

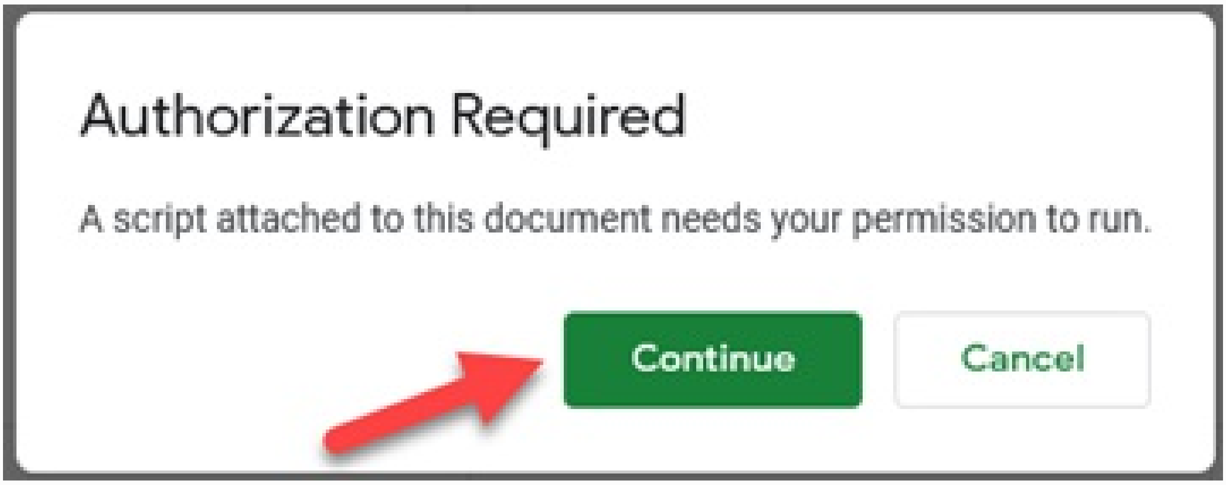
How to authorize a script to run?

The first time a team member runs a script by clicking a button, Google will ask her/him to authorize the script.

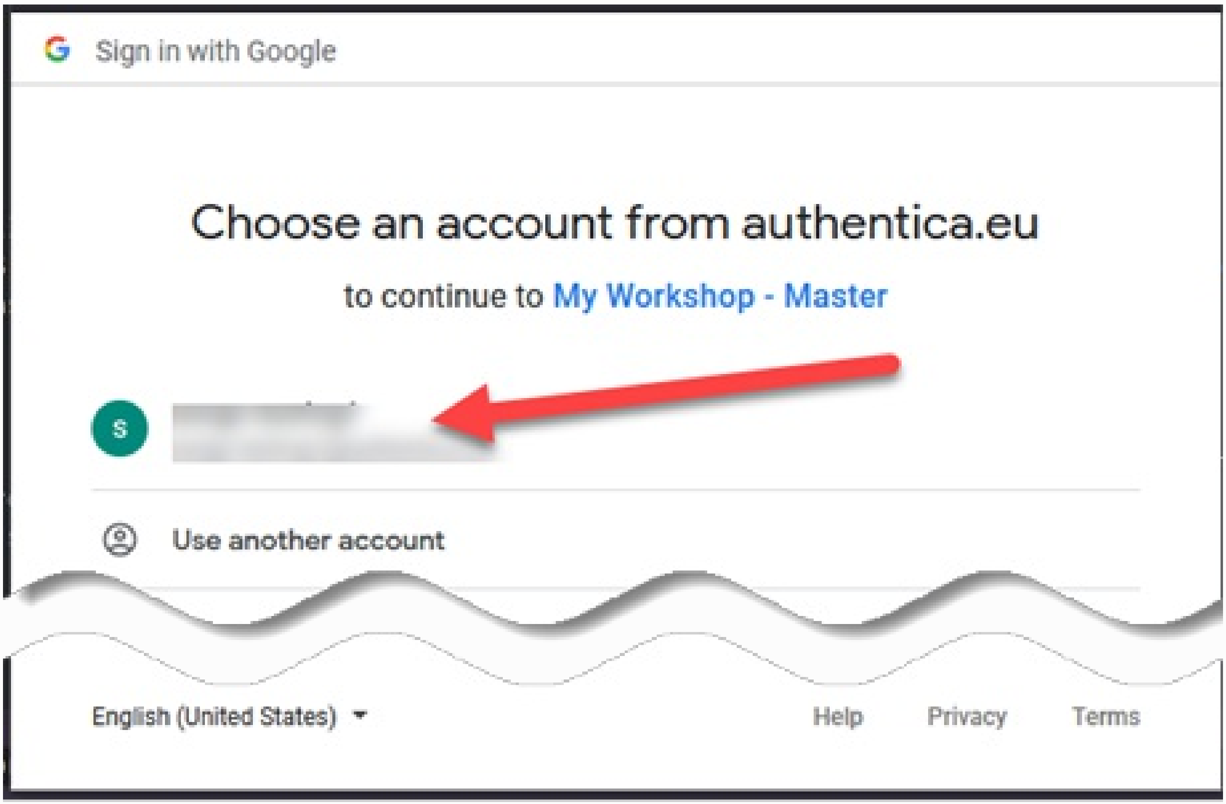
> **Warning**

After the authorization, the action which triggered it, like clicking a button, must be re-done!

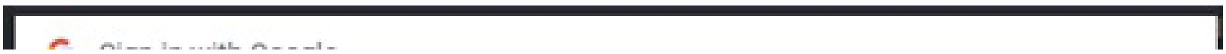
On the first authorization screen click "Continue":

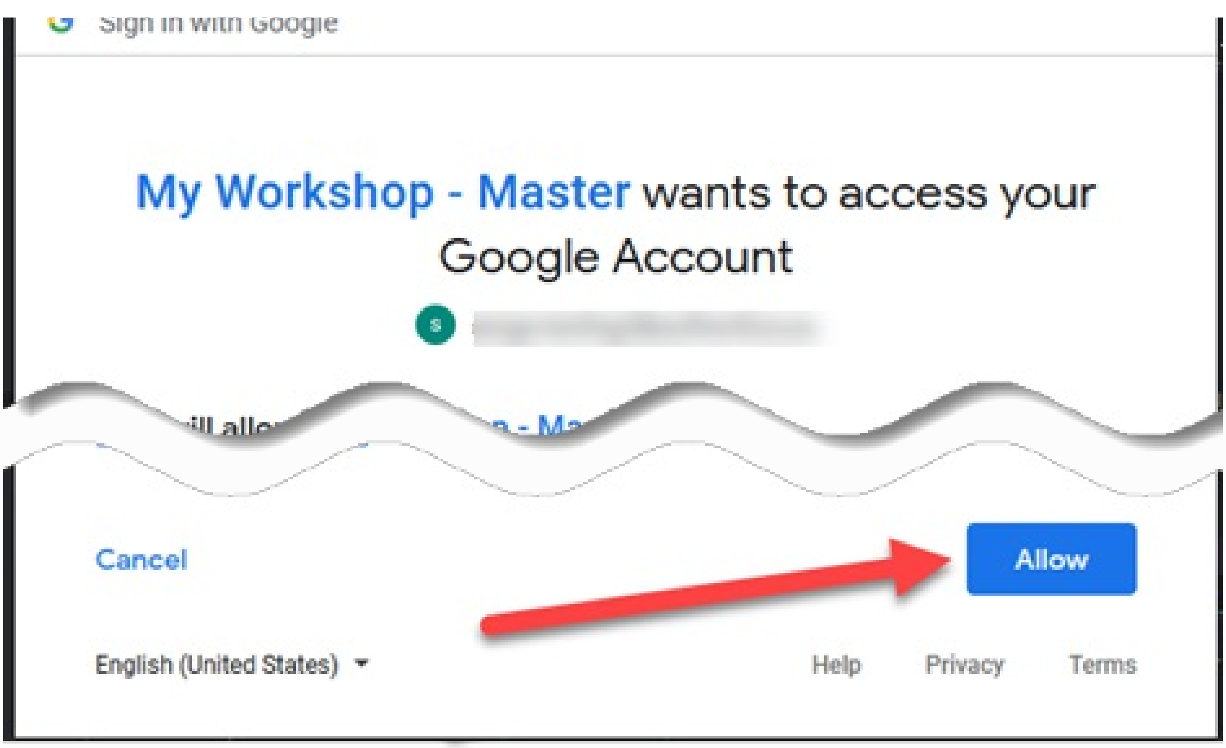


On the next screen, the team member selects the Google ID for this authorization. Only one "authentica.eu" ID is presented. Just select it.



On the next screen, click "Allow" to confirm the authorization.





How to use Microsoft office documents in Google Drive?

As of end 2020, we experience the following situation in Google Workspace:

- Native Google Docs/Sheets/Slides are very attractive in a multi user situation: real-time editing/commenting and "infinite" undo/redo
- The compatibility between Google and Microsoft formats, for our type of work, is:
  - Very good for Google Docs to/from Microsoft Word
  - Very good for formulas/text based Google Sheets to/from Excel. Zero for macros/programming and advanced database functions.
  - Poor for Google Slides to/from PowerPoint: font and formatting issues.

So we have adopted the following guidelines for our virtual OW work:

- For text and spreadsheet documents, do all work related to the virtual OW within your vOW workspace in Google Docs/Sheets format. Download as Microsoft Word/Excel only to share "non-live documents" outside, like an email attachment with instructions to participants.
- For presentation documents:
  - If OK for the/all editor(s), use only Google Slides. Then to avoid formatting issues, present always in Google Slides.
  - If PowerPoint must be used by only one editor, this editor could keep the master version on his/her PC and, if needed, upload to Google Drive for sharing with read/commenting-only co-workers
  - If PowerPoint must be used with multiple editors, all editors should download and use Drive File Stream to see who's editing with real-time presence in Microsoft Office. And they must all pay attention to avoid simultaneous edits.