

# Assessment

## WHEN to use Web and Video Conferencing

For People invested in Human Resources, Talent Management, Learning, Training and Development, Performance Management, Organizational Development, Coaching and Facilitation.

**The following three pages contain 41 examples of WHEN you can use Web and Video Conferencing with people in different locations.**




**INSTRUCTIONS** On the next pages, place a checkmark next to the task (example) if it is something that you could be doing more of with Web and Video Conferencing.

*See page 5 for Three Styles of Web and Video Conferencing*

Collaboration, Productivity, and Training  
**morevirtual.com**  
*"Dynamic collaboration gets results"*

**No Travel. Less Travel. Less Driving.**

**Leverage the Power of Web and Video Conferencing**

**State ● County ● City**

For additional information: <https://www.lessdriving.org>

When people are in different locations, use Web and Video Conferencing.

Your Name \_\_\_\_\_

## In the Loop with Stakeholders and Internal Clients

- \_\_\_\_\_ 1.1 Give a virtual presentation to executives, e.g. on a Succession Plan, Performance Management System, Employee Benefits Plan, and Outsourcing Plan.  Low Interactivity  High Interactivity
- \_\_\_\_\_ 1.2 Debrief/give status updates to executives/department heads on the Leadership Development program; Agile; AI progress; Talent Management processes; Alignment initiative; Onboarding process; Training program; Work At Home and Flexwork-Telecommuting program; On-Demand system; LMS; Culture Change initiative; Assessment results; Wellness program; and so forth.
- \_\_\_\_\_ 1.3 Involve your internal clients and stakeholders in periodic **collaborative planning meetings**.
- \_\_\_\_\_ 1.4 Plan a "virtual roundtable" event for 100's of people. Then, be the virtual master of ceremonies for the event, with executives, stakeholders, experts and participants in multiple locations.
- \_\_\_\_\_ 1.5 Plan the executive team's off-site retreat or conference.
- \_\_\_\_\_ 1.6 Prepare executives for large audience programs (using Web and Video Conferencing).
- \_\_\_\_\_ 1.7 **Facilitate** virtual meetings to discuss policies that would increase innovation.

## Managing and Day-to-Day

- \_\_\_\_\_ 2.1 For day-to-day work, use Web and Video Conferencing with people in other locations.
- \_\_\_\_\_ 2.2 Manage dispersed staff and virtual teams. (Build camaraderie, collaboration, communication, cooperation, and teamwork. Do not let "lack of clarity" be a problem.)
- \_\_\_\_\_ 2.3 Manage contracts. Show and discuss "what if" budget (financial) scenarios.
- \_\_\_\_\_ 2.4 Conduct problem-solving meetings with suppliers and partners. Discuss project milestones.
- \_\_\_\_\_ 2.5 Manage projects. Discuss project status with team members and make changes to project plans. Ensure coordination and communication.

## Pre-Sales / Pre-Contracting

- \_\_\_\_\_ 3.1 Deliver content-oriented "webinars."
- \_\_\_\_\_ 3.2 Give demos."
- \_\_\_\_\_ 3.3 Obtain input from stakeholders on success criteria, assumptions, and risks.
- \_\_\_\_\_ 3.4 During "discovery," involve front-line employees, end users and stakeholders ... for new programs and technology (portals, software, online dashboards, eLearning, collaboration tools, LMS).

## When people are in different locations, use Web and Video Conferencing

Your Name \_\_\_\_\_

- \_\_\_\_\_ 3.5 Collaboratively with your internal clients, develop and lock-down the consulting plan and/or statement of work.
- \_\_\_\_\_ 3.6 For custom solutions, get agreement on objectives, requirements, the design, and the storyboards.

## Experts

- \_\_\_\_\_ 4.1 Involve experts in decision-making, when they are in other physical locations.
- \_\_\_\_\_ 4.2 People in other locations deliver their "expertise" to virtual teams and people in multiple locations.

## Workforce Performance

- \_\_\_\_\_ 5.1 Deliver follow-up "real-time" classes and/or a "Coaching Program" (after eLearning and classroom – virtual classroom and in-person classroom).
- \_\_\_\_\_ 5.2 Work with associates and consultants to design and co-design: (a) real-time virtual classes and courses (vILT) / leader-led online teaching and learning, (b) eLearning, (c) traditional classroom (ILT) courses, (d) videoconferencing courses, (e) job aids, (f) scripts, (g) T-T-T, and so forth. (Blend real-time distance learning with eLearning and other delivery methods.)
- \_\_\_\_\_ 5.3 Deliver and co-deliver instructor-led real-time virtual classes and courses.
- \_\_\_\_\_ 5.4 Test a HR portal, HR software, a LMS and LCMS, an on-demand system, and so forth.
- \_\_\_\_\_ 5.5 Conduct training needs assessments.
- \_\_\_\_\_ 5.6 Conduct client review meetings so that you get immediate feedback and approval on course materials, content, and graphics. Co-create and revise at the same time, when necessary.

## Coaching, Facilitating, and Organizational Development

- \_\_\_\_\_ 6.1 Provide virtual facilitation and OD interventions to individuals, workgroups, and teams. For example, assist a M&A or Digital Transformation team and help a struggling leadership team that is hundreds/thousands of miles away. Also, lead brainstorming and problem-solving sessions – without traveling/driving.
- \_\_\_\_\_ 6.2 Facilitate meetings for the company's Foundation or Volunteerism program.
- \_\_\_\_\_ 6.3 Be a virtual coach for Executives, Managers, and Project Team leaders.

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Your Name \_\_\_\_\_

## **Change Management ... for a specific business change**

- \_\_\_ 7.1 Identify stakeholders.
- \_\_\_ 7.2 Conduct assessments – change impacts.
- \_\_\_ 7.3 Plan and deploy communications.
- \_\_\_ 7.4 Conduct learning needs analysis.
- \_\_\_ 7.5 Oversee training development and deployment. “Leading Change” for all levels of management.
- \_\_\_ 7.6 Alignment – organizational design, processes, leadership, culture.

## **New Initiatives and Programs**

- \_\_\_ 8.1 Get clarity on scope and expectations (e.g. Work At Home, BPO, Technology Initiatives, Competency Model, Diversity Program, Compensation Plan, Culture Change, and so forth).
- \_\_\_ 8.2 Design the new initiative/program.
- \_\_\_ 8.3 Involve the right cast of characters.
- \_\_\_ 8.4 Develop the “guts” of the initiative/program.
- \_\_\_ 8.5 Align people with regard to roles and responsibilities.
- \_\_\_ 8.6 Ongoing collaboration, communication, and coordination during Implementation and Rollout.

### **Presented by Strategic Business and Technology Alliances, Inc.**

Strategic Business and Technology Alliances, Inc. provides different services to help people leverage the power of Web and Video Conferencing to achieve their goals.

Our approach is based on collaboration, listening to you, and focusing on your objectives.

We work with new and experienced users of Web and Video Conferencing.

**Are You Leveraging the Power of Web and Video Conferencing?**

## Three Styles of Web and Video Conferencing

We think of Web and Video Conferencing as having three styles.

**Webinar:** Webinars convey information with light discussion, chat, and Q&A.

**Training and Education:** This style is for **leader-led online teaching and learning (virtual classroom)**. Use for people acquiring knowledge and skills; coaching and reinforcement; blended learning processes; and practicing.

**Collaborative and Interactive:** This style is when your meeting purpose requires collaboration, interaction, high involvement, the give and take of ideas, divergent and convergent thinking, discussions, building consensus, and solving problems.



### What You Can Do

- Active Listening / Communicate
- Screen share (share your screen)
- Discuss survey results
- Type and respond to chat messages
- Agree on goals
- Collaborate in breakout rooms
- Co-write an action plan
- Gather & document requirements
- Watch a pre-recorded video
- Listen to an audio clip

- Brainstorm
- Vote on a survey (poll)
- Video Chat
- Answer questions
- Socialize
- Write steps to solve a problem
- Use annotation (markup tools)
- Record the session
- Build consensus