“Put Yourself In Their Shoes”

Crafting Experiential Meetings for a Virtual Environment

An Interview with Merrick Hoben, CBI

Introduction

The COVID-19 pandemic has fundamentally changed the way we communicate. Shutdowns for physical distancing mandate a dramatic shift from in-person communication to dialogue almost entirely over virtual platforms. Previously unfathomable scenarios became inevitable realities: discussion-based classes forced to move online, international strategy workshops reorganized for Zoom. At the heart of this shift was a question - *how will this all work*? How will the nuance of in-person communication, complete with body language and eye contact, change when mediated by impersonal screens, questionable internet connections, and miles of physical distance?

Appreciation for the art of facilitation is even more pronounced as we navigate these new modes of dialogue. Facilitators and mediators, equipped with a deep understanding of dialogue and the expertise of crafting thoughtful processes for engagement, can provide a source of insight in these uncertain times. How can we continue to engage in constructive dialogues? How can we design meetings for virtual platforms? Transforming in-person meetings to a virtual environment can frustrate and highlight the difficulties of communication. It can also provide opportunities.

Merrick Hoben is a facilitator and mediator at the Consensus Building Institute with decades of experience facilitating constructive conversations between diverse parties. As the pandemic started, his work shifted entirely online, and he rose to the occasion with creative adaptations. With this global shift towards remote dialogue, I turned to Merrick for insight and lessons on how we all might adapt to communicating in virtual environments. I hoped to hear his story of adapting a workshop to a virtual format, and to learn how well in-person facilitation techniques translate into a virtual environment.

In the interview that follows, Merrick shares his wealth of knowledge about facilitating dialogue and crafting creative processes centered on the participant experience. We see how his foundational principles of "dignity in dialogue" play out in the way he approaches the design of experiential meetings. His strategies and tips for virtual facilitation are helpful for everyone engaging on online platforms, even if we are not the facilitators. His advice to center on the experience of the participant is helpful for anyone designing a process—or product—that engages others. And his approach towards focusing on the narrative is valuable for all of us who plan for the future, to think about how our own stories unfold. The lessons from Merrick's narrative apply far beyond the Zoom screen, to help us reflect on facilitation in person, and dialogue as a whole.

I spoke with Merrick Hoben, over Zoom, on April 8, 2020. He started with some comments on how his facilitation work was changing in the midst of the COVID-19 pandemic.

Interview Transcript

There's less to do now, because work has fallen away, but everything we're doing is in new spaces, in new mediums that take longer. Not just because we're not savvy in all the software - not just Zoom but a whole series of interactive dynamic stuff you can do with people - but to plan something that works, and holds people's attention, takes twice to three times the amount of time that an in-person meeting does. And it's not just because it's new, it's because every minute counts: you're in a battle for people's attention. It's challenging if you want it to be good, but if you're okay with it being just average, then it doesn't have to be. But if you want to win the space - because it's kind of like whoever's better at it is going to win the work - if you want it, then you've got to work hard. So it's a weird moment.

My background was in actually environmental policy and in natural resource science. I was going down a technical route, and then I got in positions, both here in the United States but also overseas, where I realized that in solving some of the more complex resource disputes, that, in fact, the design of conversations was equally important as the data that was supporting those conversations. (In this case, it was all in conservation in the bi-national parks between Costa Rica and Panama.) So, I came back to the University of Michigan and studied some more, did my Master's there, and had a sub focus in dispute resolution as it applied to natural resource conflict. I wrote a thesis about it, and then presented it at SPIDR, which was the Society of Professionals in Dispute Resolution, out in Colorado. And I got up there and pretended I knew what I was talking about, and CBI [Consensus Building Institute] was there, and they said, "Hm, that's interesting. Maybe we should look at this guy and see if he's a good Junior associate."

So that's what happened - and I got the job with CBI as one of the first Junior associates This is back in '99, so I have been with CBI for 20+ years. And that is a miracle, but that's because my job is many jobs in one, and it's evolved. I've had unbelievable leeway to do many things, and also do a lot of experimentation, of which today's case is one - it exemplifies experimentation, in a moment where we must adapt

What I do, to explain it in a phrase, is I help diverse groups have better conversations - and potentially better decisions, if in fact that's what they're trying to do (i.e. make a decision). And they're not always trying to do that, because there can be other things that we're up to, in these conversations - brainstorming generative conversations, not decision making ones. But ultimately, are they better conversations (meaning informed)? Are they creative, are they diverse, are they connected to the systems that they impact? Do people feel heard, do they feel acknowledged, do they have that sense of agency, do they feel a sense of reciprocity, back-and-

forth in the discussion? Do they feel a sense of clarity, that is, is there going to be a clear process and next steps as per the questions and conversations that they've had? So those elements are what ultimately constitute the experience of dignity in dialogue. That's what I do - help people have that experience of dignity and effectiveness vis-a-vis acknowledgement, agency, reciprocity, and clarity of their conversations that they're trying to have. And that's what I tried to do in the example that we'll talk about today.

The day to day job is probably something you may not intuitively think of when you think about facilitation or mediation work for multiparty dialogue work. My job is to help people understand the story that they are trying to engage in, contribute to, or complete. Every engagement has a subtext of a narrative, an arc. A question that things begin with. A series of steps - even tension points - in conversations like good narratives and stories do, and ideally if done well, some conclusion, or point of connection, going forward. So I help people on a daily basis, figure out what their story is. And, what that collective story is when they're a part of multi actor engagements and conversations. That's what agendas are, agendas are stories.

Let's just put it this way, everyone's learning, right, but by now I've had a lot of experience. I will still say there are things to learn, but, if you have not done this well? In the past, if the facilitator or mediator has not realized that you are trying to be an architect of helping people tell a story, you're not imposing it on them but you're actually trying to draw that out of them, and create a sense of shared ownership of that story in a way that they are participating in the conversation, then you actually don't understand what you're doing. Which is a little bold to say. But I feel like that's an important fact of acknowledging the nature of human interaction, which is that we seek that coherence - and get upset when we don't get it. *Why are we having this conversation? Where is it going? I don't understand why we had that presentation there! Why is*

this going on so long, forever? When is my chance to speak? Those are all expressions of incoherence. Our job is to distill the picture and the story to augment the coherence and magnify the meaningful impact and contribution for respective stakeholders.

So this case: this is my third annual meeting of the ACA, the Alliances for Climate Action. I am not a climate change expert, but, I know what they're doing. What they're doing is trying to figure out how, collectively as concerned regional organizations, they can leverage the commitments of key decision makers (governments, businesses, and others) to contribute to carbon emission targets, disclosures, that help bring countries closer to 1.5 [degrees of warming]. The underlying thesis is that if we don't have this collaborative, collective yet independent, effort of these organizations on the ground to make these contributions, because we know it won't happen from the top down only. It will only happen through the influence of these organizations that understand how to persuade key emitters on the ground to make these contributions because they see it in their self interests to do so, and they see a pathway or a ramp to achieving 1.5, and that it is actually in their primary interests of social and economic well-being for their respective regions.

That is why, in this case, WWF [World Wildlife Fund], seeing this as important to get to the 1.5c target, came up with this idea for a collaborative engagement that would ask organizations to come together to adopt similar pathways, ideas, and pillars of engagement that will ultimately leverage the contribution to 1.5c. Now to do that is a massive effort in alignment building, where there are common premises of the work, but there are distinctions in terms of county contexts and political contexts that make certain things possible and other things impossible. So, how do they bind through collaboration, but also do things in their respective ways that ultimately lead to a common goal.

They do have some foundation funding to help drive this—but not to own it. And that's actually a very important part of this. The convening organization doesn't want to come down as the dictating organization. They are trying to set a vision, but not determine exactly how that vision should unfold. What happens instead is this co-creative effort of clarifying this path. Therefore all interaction, whether it be in person or virtual, is about that collective effort of "how do we do this? how do we help each other tell better, more persuasive stories to convince these key actors to essentially reduce their emissions."

There are six active Alliances for Climate Action, just to name a few, there's South Africa and Japan and Argentina. So there's a handful [of countries] as well as partners that help support regional action. The United States as well is part of this - a group called "We are still in" - that's one of these action partners. So that's who's on these calls. It's usually more than one person from these six alliances plus partners, which on a call amounts to up to 45 people, and for better or worse, across 17 time zones. It's a little wild.

Of course the original intention was "Hey here's this next meeting, and we know you guys, and we can do it super efficiently, because I know the conversations and the actors." And we bought tickets to go, and I thought "Hey guys, there's this COVID thing going on in China. (This is in February) You think there's a chance this might get disrupted?" I mean, probably not right, it's Argentina, and it's summer time, so what's the big deal. And they're like "Don't worry about it. Don't buy a non-refundable ticket, just get it quick, buy the ticket straight up, because time's running out." (They always call me the last minute.)

I was planning on going to New York, actually, the night before. I had this crazy trip planned—so, just as a matter of anecdote: when you work in this space you know things are going to fall away, so you kind of pack your schedule a little bit. So I had some work in

Washington, followed by having to run up to New York on the train. And I was going to facilitate a meeting among Benefit Corporations at the Ford Foundation. And then I was going to, that day, go to the airport catch the 11:30 overnight flight down to Buenos Aires, sleep in till 10am, and then walk into these meetings to facilitate for four days straight, and then get back on a plane on Friday night, fly back to New York City, and then I had another meeting - also on climate issues.

So, I was going to do all that. It was crazy. I had like 10 days of back to back work. Herculean, but had I done it, I would've accounted for a lot of my billable activity for certain period of time. So I thought “well, if I'm going to go, I might as well pack all this up” because now I like to pack things really tightly—because then when I come home, I can be with my kids. So, anyway, this whole thing [COVID-19] started going down. So I said "guys, it doesn't look good. It's looking tough here, what do you think?" And now it's 24 hours before I'm going to NY and they're like "Yeah, WWF just shut down all of its staff flights, so... No.”

So alright, well I guess I'm still going to New York for this one-day thing, because I was gonna go to New York, but then that looked terrible. And for the first time in my life, I said to the client "We're making a mistake.” There's a chance that we're walking into a pandemic time bomb. Maybe it's no big deal, but it's our responsibility as the facilitators not to expose everybody to this. And they're like "Come on, Merrick, we'll have Purell on all the tables, it's gonna be fine. You know, no worries." I'm like "yeah, but you're asking everybody to go there..." Bottom line is, they canceled too.

So, there I was, with all my meetings canceled, including the other one I was going to come back to. So all three meetings cancel. And then, all three meetings came to me and said "can we turn it into a virtual meeting". Not just this one. But the one in New York and the one

afterwards. So it's a sandwich. New York, Argentina and then back to New York, all three of them. These are meetings that were going to be hard anyway, but now there were three meetings—all virtual.

So they asked me, the ACA one, they said "We have five days to turn this entire thing into a virtual context - what do you recommend?" And, in good facilitator professional skills you say, "of course we can do it." Meanwhile, you bite your tongue, and your feet chatter on the ground like you don't know how the hell you're gonna pull it off. So that's what I did. And then, you know, obviously the moment I hung up that phone, I talked to a lot of my colleagues to try to figure things out.

The most important skill set there is that you are willing to invent and to bring people along with you and to have them understand that you're doing something new, and that's okay and it's not all gonna be perfect but let's try anyway. Because it's better than no meeting at all. Everyone has these days blocked out, they were going to travel, now they've got nothing to do, the climate is going to crap anyway—so what, are we all just going to give up and wait? Because if we wait, we may wait forever and as you can see, we're now waiting forever. Right. So that's what happened. And so that's where I can turn the page here and tell you what we did.

The first thing to do is you don't disappear into a black box and think you can come up with magic, and then come back and say "Does everybody like it?" because you're assuredly going to miss it.

It's actually really about interviewing. It's about asking the client "*If we're going to restructure this, we need, first of all, some principles. And some values that drive the experience we want people to have. So what is that experience?"* Well, we can't overwhelm them. We can't

exhaust them, we can't drown them in information. We have to instead inspire them and leverage insight from very specific queries. So the first question I ask, which actually translates right from in-person to virtual context—and by the way this is a theme throughout, which is that I think many principles of in-person meetings transfer directly—they just have to be augmented. And if you don't augment, that's when you lose people's attention.

And the reason for it is because you can't do an 8 hour day with a couple breaks online. All you can do is a couple hours, with breaks. Because the human being, despite our modern sedentary and overly intellectual nature, wasn't meant to do this [video conferencing]. This sucks, if you're wanting to keep oxygen flowing and whatever else, it's not easy, if you're doing this all day. So maybe some things will be better than others, but you're not supposed to be doing this 10 hours a day. So why is it you're going to be better than anybody else?

The point is, you have to chunk it. Take things and then chunk it by core conversations. And then, not only do you chunk it, but just like a recipe, the pieces have to connect. In this case we used the book analogy. This says “Chapters and Guiding Queries”, so there's a chapter. What is the title of that chapter? Well, if the chapter is "Building an Organized Voice in 2020", then, some of the questions are: *What are our key policy asks? How can we sharpen what we're advocating for? What are the key levers and interventions? How do we best position ourselves?*

So you have to think, *what are the fundamental questions that will inform, or further clarify, that chapter*. And *why would I possibly want to read it, if I were an audience or a participant?* So that's the first step, and you do that <u>with</u> a client, you don't do it <u>for</u> a client. That's a very important thing. And of course, not all clients are the same, but if you have a client, whether you know them before or not, who is responsive to that conversation - *"tell me more about what you want to achieve here" - "tell me a story about what conversations we need to*

have" - "is there a sequence to those" - and as they're talking, you take down those notes. And then those notes become a baseline fabric of "*Oh, it sounds like this is the sequence, let's not worry about timing yet, let's just worry about the story. What else is missing from here?"* That's how this all started. That's really the "how" of agenda design.

The first question is "*how does this story end*"? Even before you start it. It's the classic one where we're standing in the parking lot, we had this meeting - what are we saying about it? All the way to the end - what is that experience? And then, there's the inverse one: it failed. Tell me the story of failure. Tell me why we just had this meeting and it sucked. And by asking that question, in a really almost coarse way, you get a really burnished answer about what land mines we are trying to avoid - which inform what has to be achieved. Tell me why we failed. Tell me what *didn't* happen. And then you turn it around, and say *"Aha! It sounds like what's most important to this meeting is A, B, and C. Ah, ok yeah, that's great - terrific. Huh, that's interesting, I'm just curious - if you had to come up with only three conversations for this entire thing* - (These are exercises, these are just verbal banter with a client) - *come up with just three questions that if we answered these questions, you would feel that it was a good meeting. What are those questions?"* And then they're like *"it's actually not 3, Merrick, it's 2."* Or it's 5, or it's 7, or in this case - it's 16. They build on each other - but this is what I did with this client. So do that, and then craft agendas around it, and then you understand how much you can chunk it - and that's why we ended up with some many questions because we realized that it was going to take a lot of time - 12 meetings.

How to foster dialogue between participants in a virtual space? There are many bells and whistles to this, but there's only one main idea. And that is: everybody needs something to do at least every 10 minutes. If you don't have them doing things, like *"listen guys, we're about to hear*

a presentation. And I know this might be a little extra detail for you, but before we do this, number one thing, I just want to take a quick Zoom poll. How many rolls of toilet paper do you have in your house right now? Write it down. Put it in the chat box. 5, 24, 45, 72, who's got 72?? Why do you have 72 rolls of toilet paper??" So now everyone's awake. And then you say *"great, guys, here comes a super important conversation. Forget your toilet paper for a little bit - it's going to be enough*."

"Now. Your job is to come up with a stumper question based on this presentation. What's the one thing you need to know more about in order to feel like you were happy with what you're about to hear (or what you did hear). And you have a choice - you can either write it in the chat box if that's how you work, you can process that way - you can raise your hand and we take pauses in the middle, and take 3-4 queries, or, at the end, make sure you drop your question into this shared google doc or whatever else, where the presenter can respond to it. Or, if they couldn't respond to it, they'll get back to you asynchronously after this meeting. Right. So. Everybody got your job? Terrific. Let's start." So that's what I mean by interactions.

You have to think, *how are they going to feel,* and then design around that feeling. So what's the feeling when you pass somebody information which they could possibly have read anyway, on their own, beforehand? They are dead bored. Usually. That's a rule of thumb. You should never give a presentation on virtual meetings that is more than 10 or 15 minutes. People give them for a long time let me tell you, it's pretty crazy.

Information exchange is the worst modality of virtual interaction. Because it creates this hub and spoke thing, it's one thing and everyone's out there rotating around, and unless you find a way to very specifically make the spoke connection, and they feel responsibility, and they feel they are co-creating - *"wait a minute, I am responsible for making sure we get the best out of this*

presentation - I have to come up with a question". Or, it's like *"on the back end of this, you're immediately going to be put into breakout groups, and your job is to figure out* - let's say we're talking about making pitches to government leaders about emissions reductions - *and now you have to come up with a 2-minute elevator speech based on this powerpoint in order to convince this government official that they need to take the climate ramp to 1.5c seriously. You have two minutes. What's the scene? You're in an elevator after a presentation that you just gave at a conference."* - you give it a whole theatrical context. Then you say, *"great, terrific guys, we're about to go in, elevator doors open"* and you literally open the 'elevator doors' by turning on your video and maybe you're dressed in costume or something.

This is not everyone's style, but it is my thesis about human behaviour that unless you create environments that give people a) a sense of responsibility and b) leverage their attention - if you're not trying that, whether extreme [silly costumes], which is an extreme example, I don't recommend it all the time, but if you have comfort with people and you say "we're about to try things to keep you awake, just so you know"—in other words, the fourth wall of theater: you explain that you're about to do something, and it makes you a little uncomfortable but you're going to do it anyway, "*give me some feedback later guys"*, now you've invited them in on the trick. That's how you get people to come with you. And that just takes a little bit of experimentation, confidence, and creativity - as long as you don't lose sight of the major structural components of what constitutes effective dialogue.

That's another thing too about this, the breaks[1]. They really matter. They're gold. You have to treat them like gold. But you have to get risky, a little bit risky. "Nature break" is hilarious because it's a play on words. Everyone thinks you're going to go to the bathroom but you're not. Instead, you have to find the plant in the room.

[1] See appendix with suggested breaks/reconvening activities

[Reading body language in virtual facilitation] is the equivalent of having all your senses in person, and then being reduced to one eye, with an eye patch. That's what it is, it's a 90% reduction. If anybody tells you otherwise, they're out of their mind. People can hide stuff, they're messing around on their twitter here because they're holding their phone slightly out of view, so they're like 'yeah, I really love what you're saying' but they're looking over there. Why do we know that? Because we do it, sometimes. Because shit's going down, and you feel that you have to deal with the other stuff. And you know what, you overestimate your ability to multitask. I do it every day. You do it too. Put yourself in their shoes.

So what do I do? You use different ways, you use engagement to essentially measure how much people are with you, whether it's the Zoom polling, or whether it's these little ice breaker things where we're getting people interacting, whether we're giving people responsibilities to do things, and whether they are doing it or not, you are seeing a) who is participating, because you see what quantity of response there is, and b) you give them multimedia ways of responding. One way I like to do it is to get feedback, but I say "*I'm going to give you three different ways: you can raise your hand, super. You can shout out. You can type it in the chat box*."

Or you can throw it on the Google Sheet. I use a lot of shared Google Sheets now, because people have this experience of seeing each other doing stuff at the same time and they go ape about it, because they see the speed of 45 brains who are writing at the same time - you think you're doing something awesome. You actually <u>are</u> doing something awesome. But the feeling of it - is awesome. It's like flip chart crack. That's what Google Docs are. Flip chart crack. Because people are doing it, and you're like *"Ok guys, you did all that. Now,* (this is like sticky dots on flip chart), *everybody has 5 asterisks. Put your asterisks on the stuff. Put it on*

something that's not yours." Now you see. Were they paying attention to other people's stuff? Where do the asterisks go? Then, real time, you cut paste up top, or you pull them into a different polling mechanism that allows you to rank things really quickly. I use a mid-level associate who's more savvy than me to manage the tech, because you cannot manage tech and do all this equally well. There is some terrible analogy we can come up with, but it is basically like driving and eating a four course meal, driving down the highway. So that's how I do it, so far.

Dealing with differences in a virtual space? I don't think we have it all figured out. It's a great tension, which is, how do we quickly detect what are differences and viewpoints, and then, in a meaningful and balanced way, acknowledge those viewpoints and integrate them, and weigh them.

How do we do that? I'll leave it at one particular technique: you need to give people their own space. And the way you do that, the most extreme example of that, are these virtual breakouts. You want to get a viewpoint super clear? And then put it side by side with something else? Well, you have to - here is an example. Here is something I created with my team for Monday. We're taking an idea, "Love in the time of Cholera", and we're using a play on that, "Communicating in the time of COVID", and then we are asking separate groups, led by different coalition leaders, who have different viewpoints, to think about something that is very different for each of them. And in these exercises, the first one, we're asking them to imagine how the ACA as a whole should communicate around the climate issues in the context of COVID, which is right now, as we're in lockdown. What about the moment of rebound, when things ultimately do turn a corner, and we're looking at the economy maybe coming back? Then to recovery, building back. How do we articulate the voice? And, by the way, are our current

messages going to hit positively or negatively in this moment? Do we need to state things publicly - or do we need to whisper them? This is the “public statement vs private whisper” that we came up with.

So, how do we actually get these different views and tensions articulated? Well as it turns out, we have everybody do this exercise independently. So you have all these different groups, all 5 groups are working simultaneously on this, separately, to articulate their views and their rationale. Then, on the back end of that, is an opportunity for them to express those differences and rationale. And to have articulated and well-supported differences of opinion, should they have differences of opinion. So this is structure. Structure that reinforces and is permissive of allowing different viewpoints on very controversial and difficult issues to come to the fore, and then to be compared. So the structure matters. If you don't provide that structure, in these contexts, it actually becomes harder to elucidate and draw out those differences. And when you don't draw out those differences, if you don't draw out those differences, if you don't honor those and acknowledge those - this goes back to that aspect of dignity - if you don't acknowledge the differences and demonstrate agency, reciprocity, and clarity - if you don't create structure that drives a dignified interaction, then you lose the richness of diverse thinking and differences, in fact, where those differences are often times the core source of creativity. Because when people disagree, they have to problem-solve. And if problem solving is handled constructively, usually it means innovation. It doesn't always mean compromise. It doesn't always mean a split down the middle. It means that sometimes the pie can be made bigger versus being reduced, in order to resolve differences and concerns.

And of course there are many differences among these ACA groups across multiple political, economic, and cultural contexts. So we're creating structures like this to help those

differences come out. But then, to also ask this question, "*given those differences, what binds us*" and "*given those differences, what is distinct? where do we need to be differentiated*?"

Even in groups that are of similar ilk, sometimes they don't like each other, or what they say, but it is not the same thing as truly at-odds stakeholders. It's the same as it in person, but it has to be more thoughtful, which is, how do you humanize people? That doesn't mean it's going to work all the time—and let's be honest, it's kind of rough out there, in terms of the state of democracy anyway—and facilitated dialogue is not the elixir to these differences. In many ways, the erosion of core values of society, the weaponization of information, has made it super hard in some cases. But the humanizing piece is important. In an in-person thing, what would we do? Well, we'd do a site visit to the area that was impacted, and we'd have a conversation about it, and we'd share lunch. We'd take time, and wouldn't force it too quickly. That sort of stuff, that's the humanizing.

Here, in a virtual context, it's harder. I have not yet experienced all the ways it could blow up, but my thesis, TBD, is that you can find those ways of connection. It is harder. There's a reason we were born with senses, because those senses helped us to connect, and create bonds of interdependence. Same ideas apply, it's just harder, which is why I spend two-to-three times more effort, just on design. This document here, to get the idea and design it, took probably 5 hours, which is crazy. Versus "*Hey guys let's just go up to this flip chart, and I'll draw this square, and take these sticky dots, and that was fun. Lunch!*"

In terms of bringing lessons from virtual facilitation to in-person, whenever that happens, I think it will be the integration of technology. We already do it with keypad polling and stuff, but you can do even more than that now. You can do in-person engagement but also have it be simultaneous with online, so people have laptops and whatever else. You can use all these tools,

even though we're face to face, and we can still have lunch. And socialize. That's the integration. The understanding you can integrate this better is clear to me. But let's be honest, we're not going to meet for 18 months. Seriously. There's no meeting of anybody over 10 people (this is just my guess, I don't know what's going to happen) but if you look at all the science and you look at the fact that 60,000 people are supposed to die in April, and 83,000 more by August, and then 250,000 by the end of the year? And that's Fauci saying that? And Trump is finally agreeing? You know it's going to be bad. And so for our field, there is no more face-to-face. It's over. It is over. Meetings as we know it are over.

The delta between what you can achieve online and in person is not as big as we thought. It's mostly our ignorance about what was possible. We can evolve from this. But is there a need for in person? Yes there is a need for in person. And I think it usually does have a correlation to the emotional stakes. And so, when I've gotten involved in brutal human rights conflicts, where I've had to bring stakeholders together that hadn't seen each other for the first time, it did not occur to me to use Zoom to do that. I'm not doing that now, and I'm glad I didn't. That was two years ago in Honduras, crazy horrible stuff. I went down there 22 times in the year to stand side-by-side with different stakeholders at clandestine graves in an agricultural area where people had been removed from their land. But it wasn't a black or white issue, there were no good people and bad people - there's all gray people. Different story, but the bottom line is that I would never have been able to do anything in Latin America on Zoom with those issues, just to put it in an extreme context.

But is there a much wider range of some things that might be possible online and that could save us or bring us into a tighter reason for being together later? Or that we do meet up front together and that we transition to online later? There's a whole gradation of where you

could connect these different modalities. I just think we got comfortable with one modality because we didn't know any better. And now, of course, what did Ben Franklin say? "Necessity is the mother of invention." That's what's happening. It turns out we can do a lot more. We just have to be crazy thoughtful about the experience of the participant. And that's why the mindset of narrative and experiential meetings, that's why it matters so much - just imagine yourself in their shoes.

Analysis

This is a story about creative adaptation and process design. It is a story of the fundamentals of facilitating dialogue and developing agendas, amplified for application in a virtual environment. Merrick shares insight into his practice, both in pre-meeting work with a client and in-meeting engagement of participants. The specific case centers on the re-design of a strategy workshop for the Alliances for Climate Action (ACA), hosted by the World Wildlife Fund (WWF). The original plan for the 5-day workshop in Argentina was scrapped with the onset of COVID-19. In its place, Merrick worked with the client (WWF) to adapt the workshop design for a virtual environment, with 12 segmented meetings over the course of several weeks.

While the discussion of process design is centered on this case, the concepts and lessons are applicable to in-person facilitation as well. The overarching message reiterated throughout his narrative is that the path to better conversations, to "dignity in dialogue", is through a narrative process design that is fundamentally centered on the experience of the participant.

"Dignity in Dialogue"

The foundation of Merrick's approach to facilitation is what he calls "*dignity in dialogue*". He articulates four key elements that are consistent throughout in-person or virtual spaces of dialogue: "Do people feel heard, do they feel acknowledged, do they have that sense of agency, do they feel a sense of reciprocity, a back-and-forth in the discussion? Do they feel a sense of clarity, that is, is there going to be a clear process and next steps as per the questions and conversations that they've had?"

First and foremost is acknowledgement. People need space to both speak and be listened to. This is a foundational pillar in mediation, negotiation, and facilitation. As Roger Fisher and

William Ury write in Getting to Yes, "the cheapest concession you can make to the other side is to let them know they have been heard" (Fisher et al, 2011, p. 43). A facilitator provides the space and structure for this hearing and acknowledgement to occur—and demonstrates these skills of active listening themselves, as an example of what it means to be heard. The goal is for each participant to be heard and acknowledged not only by the facilitator, but by the other participants as well.

Next, Merrick discusses the importance of providing agency, reciprocity, and clarity. Agency is crucial for engaged participation in a dialogue. Participants must feel that they not only have an interest in being there, but a sense of agency, control, and ownership over the process. Deliberative practitioners demonstrate the importance of providing agency and ownership to participants in various ways, from Mike Hughes who gives full control of the dialogue process to participants with his "four chairs" structure (Forester & Weiser, 1995) to Bill Diepeveen who reassures participants that they have complete control of the process with the agency to walk out at any time (Forester, 2005). Merrick provides the participants of the ACA process a sense of agency in various ways through engagement, responsibility, and co-creation of process.

Reciprocity, or "a sense of back-and-forth" moves beyond the "acknowledgement", and into the realm of engagement and discourse. There are numerous techniques for facilitating in person to provide a sense of reciprocity and engagement in conversation, such as sub-groups and voting with sticky dots (Forester, 2016) . Merrick creatively adapts these techniques into a virtual meeting format using Zoom break-out rooms and collaborative google docs.

Clarity is the fourth essential element of Merrick's philosophy on dialogue, and is at the core of appropriate process design. A well-designed meeting develops a clear narrative, sets

expectations, and outlines next steps. This all provides a sense of clarity and coherence. Merrick discusses the basic human need for coherence by relaying frustrations with incoherence: “We seek that coherence - and get upset when we don't get it. *Why are we having this conversation? Where is it going? I don't understand why we had that presentation there! Why is this going on so long, forever? When is my chance to speak?* Those are all expressions of incoherence. Our job is to distill the picture and the story to augment the coherence and magnify the meaningful impact and contribution for respective stakeholders.”

Distilling this “picture” and “story” is reflective of the narrative process structure Merrick uses to create this experience of “dignity in dialogue”. As he describes how he adapted a 5-day in person workshop into a multi-week virtual meeting, we see the way Merrick addresses all four of these key elements—acknowledgement, agency, clarity, and reciprocity—by focusing his process design on the experience of the participants.

Narrative and Experiential Meeting Design

Merrick’s process applies to in-person just as much as virtual meetings—but the importance of process design is heightened in a virtual environment. In the midst of his transition to all-remote work, Merrick reflects that planning virtual meetings “takes twice to three times the amount of time that an in-person meeting does. And it's not just because it's new, it's because every minute counts: you're in a battle for people's attention.” This focus on constant engagement is reflected in Merrick’s approach of using a narrative structure to create an engaging experience for participants.

Develop a Narrative: “Agendas are Stories”

Crafting the meeting as a narrative experience is central to the success of this ACA redesign. This plays out in two dimensions of the meeting experience: first, in developing the agenda with the client, and second, in designing the content of the meeting itself. His insights into overarching process design with a client is helpful not only for future facilitators, but for anyone that is thinking through how a process might play out. Designing a process requires a level of planning and forethought—not just to imagine how the participants will react, but to imagine the conclusion before even coming up with an agenda.

The first question of agenda design, Merrick says, is "*How does this story end?* Even before you start it. It's the classic one where we're standing in the parking lot, we had this meeting—what are we saying about it? All the way to the end: what is that experience? And then, there's the inverse one: it failed. Tell me the story of failure.” This line of questioning helps the client work through their objectives for the meeting, what they hope to get out of it, and what stumbling blocks might inhibit success. It also starts to paint the experience of the meeting as a narrative, with a beginning, middle, and end.

This approach, focusing on the hypothetical outcomes in order to crystalize the process, seems like a corollary to the principle of conducting an assessment before designing a mediation or facilitation processes. Pre-meeting assessments aim to ensure an understanding of the issues and problems of different participants before designing the process. This version of pre-meeting work with a client is based less on the current problems, and more on a vision of the future where objectives have been met.

Merrick helps clarify the client’s objectives through a series of questions and interviewing techniques that highlight the key principles, values, and conversation points that

motivate the meeting experience. Then, in his facilitator voice, Merrick asks the client "*I'm just curious - if you had to come up with only three conversations for this entire thing… that if we answered these questions, you would feel that it was a good meeting. What are those questions?"* This query does a great deal to further both the agenda design and the relationship with the client. Merrick poses the questions with curiosity, rather than demanding answers, which makes space for the client to explore their own interests for the future process. This positions Merrick as a constructive and supportive ally that helps the client realize their goals. It also serves to distill the client's objectives into core questions that can then be used to build the narrative structure of the meeting. Merrick sums this all up in the following quote:

> "Every engagement has a subtext of a narrative, an arc. A question that things begin with. A series of steps - even tension points - in conversations like good narratives and stories do, and ideally, if done well, some conclusion, or point of connection, going forward. So I help people on a daily basis, figure out what their story is. And, what that collective story is when they're a part of multi actor engagements and conversations. That's what agendas are, agendas are stories."

This line of questioning, from "how does this end" to "what are those core questions" all work to transform the objectives and purpose of the engagement into a narrative arc. The core queries become core conversations that can be guided with structure. For the case of the ACA meeting, Merrick uses the analogy of a book with these core conversations as chapters. He asks the client "*what are the fundamental questions that will inform, or further clarify, that chapter*. And *why would I possibly want to read it, if I were an audience or a participant?"* Once again,

Merrick uses these questions to engage the client in the creation of the process: is explicit that "you do that with a client, you don't do it for a client."

The strategy of using a book as an analogy to distill key messages is used by other facilitators as well, who also make use of a hypothetical story to get at core elements of an optimal outcome (Forester, 2009, p. 142). However, the book analogy is particularly well-suited for a virtual environment, where segmented discourse must replace full-day engagements. As Merrick says, you have to "chunk it by core conversations. And then, not only do you chunk it, but just like a recipe, the pieces have to connect." Thus, structure of "chapters" is ideal for breaking a conversation into discrete agenda items, which are tied together by the overall "book".

The narrative structure extends beyond this agenda-setting stage with Merrick and the client, and enters into the experience of the participants as well. The client worked with Merrick to set the vision and the agenda in pre-meeting planning. Then those core "chapters" provided the agendas and key questions for each of the meetings themselves. The narrative of the book served as the structure of the strategy, providing clarity and organization. And the participants all become authors of the story, instilled with a sense of agency.

Design for Experience: "Every Minute Counts"

In a virtual meeting, the participant experience is even more important, since you are fighting for people's attention. Behind a computer screen, distractions are endless, and without sharing a common space, it is difficult to keep everyone on the same page. "The human being" says Merrick, "despite our modern sedentary and overly intellectual nature, wasn't meant to do this", referring to sitting in a chair all day staring at a screen. The way around this disconnect and

distraction is with thoughtful and well-designed structure. “You have to think, *how are they going to feel,* and then design around that feeling.”

Merrick shares several best practices and strategies for designing meeting structure for engagement. “We can't overwhelm them. We can't exhaust them, we can't drown them in information. We have to instead inspire them and leverage insight from very specific queries.” The narrative structure of using a book and chapters provides connected “chunks” that can allow greater flexibility for planning a workshop in a virtual space. Within each meeting “chunk”, the experience of the participant remains central to decisions about what—and what not—to do.

Minimize information exchange

Passivity breeds disengagement on an online platform, so there is a need to keep people constantly engaged. Listening to a long presentation is a recipe for distraction and boredom. So too are discussions of information that could have been read before the meeting. Merrick advises that all such passive information receipt should be kept to a minimum. “You should never give a presentation on virtual meetings that is more than 10 or 15 minutes. People give them for a long time let me tell you, it's pretty crazy. Information exchange is the worst modality of virtual interaction.”

Maximize opportunities for engagement

To avoid passive disengagement, design for constant interaction. Merrick’s rule of thumb is that “Everybody needs something to do at least every 10 minutes.” These opportunities for engagement can take many forms, from ice-breakers (“Quick Zoom poll: how many rolls of toilet paper do you have in your house right now?”) to coming up with “stumper” questions that instill a sense of responsibility: “*Your job is to come up with a stumper question based on this*

presentation. What's the one thing you need to know more about in order to feel like you were happy with what you're about to hear". This simple preface to a presentation preempts the passive disengagement with a sense of purpose and agency.

Crucially, Merrick is careful to give multiple options for modes of engagement, being sensitive to different levels of comfort with verbal or written contributions. He also indicates that each response will be acknowledged, furthering the sense of dignity in dialogue. He continues, as the facilitator: "*And you have a choice: you can either write it in the chat box if that's how you work, you can process it that way. You can raise your hand and we take pauses in the middle, and take 3-4 queries, or, at the end, make sure you drop your question into this shared Google Doc, where the presenter can respond to it. Or, if they couldn't respond to it, they'll get back to you asynchronously after this meeting. Right. So. Everybody got your job? Terrific. Let's start*."

While in-person facilitators use flip charts or white boards for brainstorming and sharing ideas, Google Docs step in as a tool in the virtual space. The ability to collaboratively edit a shared document in synchrony instills a sense of excitement. Merrick describes; "they see the speed of 45 brains who are writing at the same time—you think you're doing something awesome. You actually <u>are</u> doing something awesome. But the feeling of it—it's awesome. It's like flip chart crack." Just like with flip charts, participants have the experience of putting their ideas out there, and having them seen.

Even the common facilitation practice of sticking colored dots to indicate preferences can transfer to the virtual space, both to express preference, and to indicate the interaction and reciprocity with the ideas of others. "*Everybody has 5 asterisks. Put your asterisks on the stuff. Put it on something that's not yours.*" Now you see. Were they paying attention to other people's stuff?" These simple tools give participants the experience of agency and reciprocity—and in

doing so, it harnesses shared time, attention, and focus towards generating ideas and content in alignment with the overall "chapter" on the agenda.

Use participation to measure engagement

Of course, not every participant engages equally—and some not at all. A facilitator in person can pick up on non-verbal cues of disengagement, discomfort, frustration, or anger. Reading body language in a virtual environment, however, is the "equivalent of having all your senses in person, and then being reduced to one eye, with an eye patch". It's impossible to see what people are doing just out of sign of the camera, and it's important to not impute meaning onto signals that may be due to poor connections or lighting. Merrick's approach is to evaluate participation in engagement techniques to gauge people's level of involvement. "Whether they are doing it or not, you are seeing a) who is participating, because you see what quantity of response there is, and b) you give them multimedia ways of responding." And participation is not just based on engagement with content. Merrick developed a selection of creative breaks and reconvening activities (see appendix) that give another opportunity to do a pulse-check on participant engagement.

Breakout groups highlight different viewpoints

Along with reading body language, it can be harder to detect and work with differences of opinion in a virtual space. People may not be compelled to bring up different perspectives, and without a nonverbal signal that they have something to say, these differences may go undetected. For this, Merrick stresses the importance of intentional structure. "Structure that reinforces and is permissive of allowing different viewpoints on very controversial and difficult issues to come to the fore, and then to be compared." For this case, he used the structure of breakout groups to give

participants the space to develop their own perspective. In this case, he had different coalitions of the ACA working simultaneously on an exercise. By giving them space to articulate their views and rationale, he is also providing a structure for the differences in view and rationale to be expressed. Then, the differences are visible to all when thoughtfully reconvened, and the structured differences can be used as a launch pad for creative problem solving—which is the hidden power of differences.

> "If you don't create structure that drives a dignified interaction, then you lose the richness of diverse thinking and differences, in fact, where those differences are oftentimes the core source of creativity. Because when people disagree, they have to problem solve. And if problem solving is handled constructively, usually it means innovation."

"Invite them in on the trick"

Finally, one of the greatest techniques Merrick uses is also the simplest: he "breaks the fourth wall" and tells participants exactly what he is doing. "*we're about to try things to keep you awake, just so you know*—in other words, the fourth wall of theater, you explain that you're about to do something, and it makes you a little uncomfortable but you're going to do it anyway, "*give me some feedback later guys"*. Now you've invited them in on the trick. That's how you get people to come with you. " Sometimes, humility and vulnerability of the facilitator can work to unite participants in the shared objective of managing the facilitator (see Mike Hughes profile, Forester 2014). Here, Merrick harnesses his humility this technique to both mitigate expectations in the uncharted territory of virtual workshops, and also to invite the participants to be actively engaged not just in the meeting, but in the design of the meeting as well.

To Zoom—and beyond

This inclusive humility is at the core of Merrick's transition to virtual facilitation. "The most important skill set there is that you are willing to invent and to bring people along with you and to have them understand that you're doing something new, and that's okay and it's not all gonna be perfect but let's try anyway. Because it's better than no meeting at all." This case of adapting the ACA meeting highlights how Merrick's many strengths as a facilitator translate into the virtual space. His exceptional mix of humility, confidence, experience, and most of all, his fantastic sense of humor, all work in service of designing a virtual process that still creates the structure for dignity in dialogue.

While his in-person facilitation certainly informs his virtual facilitation, he expects lessons from virtual facilitation will carry over back into in-person meetings if and when that reality is once again possible. Familiarization and integration of technology is central to virtual facilitation, and he sees opportunities to integrate that with more simultaneous engagement in in-person meetings. There are certainly limitations of virtual facilitation, from issues around internet access to a limited ability to manage very emotional issues. However, Merrick reflects that "The delta between what you can achieve online and in person is not as big as we thought. It's mostly our ignorance about what was possible."

Conclusion

Merrick's story of virtual facilitation has a clear message: structure, centered on the experience of the participant, is essential for dignity in dialogue. Insights into the pre-meeting agenda work with his client show the importance of asking "How does this end?" to clarify objectives and elicit essential conversations. He turns core conversations into the "chapters" of a

book that provides focus and structure to the multi-meeting workshop. His virtual meeting design creates an environment with opportunities that both give participants a sense of agency and responsibility. He is sensitive to the demands of a virtual meeting on attention, and does not rely heavily on information exchange. Instead, he provides opportunities for continual engagement, reciprocity, and acknowledgement as he leverages the attention of participants into constructive and active participation. From this structured meeting design emerges the essential components of "dignity in dialogue": acknowledgement, agency, reciprocity, and clarity.

These elements of dignity in dialogue can be applied almost universally, independent of facilitation itself. Humans need to feel heard, to have a sense of agency. The very nature of human interaction is a search for reciprocity. And a need for coherence, or clarity, is central to what we seek in these interactions. Merrick's philosophy, if taken to heart, can add dignity to our own experiences, and the experiences of interacting with others.

Lessons from Merrick's story of adaptive meeting design centered on participant experience can also help make us become better process planners, facilitators, and designers overall. For any work we may do that involves another party, whether we're asking someone to participate in a process or make a decision, it serves us well to follow Merrick's advice and "Put yourself in their shoes." This act of empathy provides the platform for thoughtful design that is truly centered on the experience of the participant.

Finally, the techniques for collaboration and communication in a virtual space, whether through utilizing tools or being sensitive to attention, can help us be more thoughtful virtual communicators as we continue through this period of physical distance. And, as Merrick says, even when we're back to meeting in person, "You can use all these tools, even though we're face to face—and we can still have lunch."

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Appendix: Breaks & Re-convening activities

- *Mugshot break* — everyone points the camera at what they're drinking from, and explains as need be:)
- *Beauty break* — this is not what you think:) — rather have folks cover their camera, find something aesthetic or beautiful on their desk, then uncover their video showing that thing. Go to gallery view for participants so all can see at once, and comment if they wish.
- *'Nature' break* — again, not what you might think. Folks stand up, walk outside, show each other the outside world instead of their office.
- *Standing break* — invite all to get up from desks / laptops after a ppt presentation for q and a from their feet.

Provided by Merrick Hoben