

Multi-team Facilitation of Very Large-scale Distributed Meetings

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Abstract. Distributed work teams routinely use virtual meetings to support their collaborative work. In this paper, we present a case study of the facilitation that was provided for a *very large-scale distributed meeting*. Small teams of facilitators were recruited, trained, and assigned to each of six discussion forums of ManagerJam, a 48 hour meeting of over 8,000 managers in a large global technology company. Through examination of pre-Jam records, analysis of the Jam conversation archive, and post-event interviews with over 20 facilitators, we describe the planning and training efforts, and assess the impact of the facilitation teams on the meeting's effectiveness. Guidelines for effective team facilitation of very large-scale meetings are provided, and design implications for meeting support systems are described.

Introduction

Computer-supported meetings have been the focus of considerable research for some time. Early work on group support systems (GSS), used to augment face-to-face meetings, focused on productivity gains that arose from such systems (see, for example Dennis, Nunamaker, & Vogel, 1990; Grohowski, McGoff, Vogel, Martz & Nunamaker, 1990; Turoff, Hiltz, Bahgat, & Rana, 1993). Several researchers have identified the importance of facilitation in the effectiveness of a GSS (Bostrum, Anson, & Clawson, 1993; Clawson, Bostrom, 1993a; Kelley, & Bostrum, 1995; Limayen, Lee-Partiridge, Dickson, & DeSanctis 1993; Nunamaker, Applegate, Kosynski, 1987). For example, it has been shown that facilitation may be necessary to help participants with use of the tool as well as

with assistance with the meeting's process (Fuller & Trower, 1994). Others have found that facilitation is important through encouragement of effective task behavior (Bostrum et al., 1993). Early work with GSS, concluded that "although the technology has matured to the point where it is very easy to use by almost anyone, our experience continues to confirm that the quality of the group session is predominantly dependent on the facilitator." McGoff and Ambrose (1991) identified several important characteristics of successful facilitators. First, they need excellent communication and group interaction skills. Second, they need to be skilled in the use of the GSS and in general group facilitation techniques.

Other GSS researchers have investigated the roles that facilitators take on during a meeting (Clawson & Bostrom, 1993b). Fuller and Trower (1994) identified eighteen roles for facilitators, including opinion seeker, elaborator, evaluator, compromiser, recorder, and standard setter. A second team of researchers identified over one thousand different characteristics of effective and ineffective behaviors of facilitators. These characteristics were grouped into 16 main role dimensions, including: appropriates, selects and prepares technology, creates comfort with and promotes understanding of the technology and technology outputs, actively builds rapport and relationships, and manages conflict and negative emotions constructively. Another team of researchers observed that various facilitation roles, such as technology facilitator and process/agenda facilitator emerge over time (Mark, Grudin, and Poltrock, 1999).

The facilitation of *distributed* group support systems has become increasingly important as economic and environmental concerns have motivated more and more virtual team interaction and collaboration. One recent empirical study reported that the facilitation challenges using a distributed GSS are different, and in some cases are greater than that of a face-to-face GSS (Romano, Nunamaker, Briggs, & Mittleman, 1999). For example, there were significant challenges with the technology, a greater need to establish and maintain focus on the meeting goals, and an increased difficulty attaining desired levels of participation.

Other research on *distributed facilitation* found that distance may increase necessary technology support due to heterogeneous technology infrastructures, and may pose additional challenges on planning activities for a remote leadership team Niederman, Beise, & Beranek (1993). The need for small groups of facilitators, or a hierarchy of facilitators was foreseen as the capacity of the distributed GSS increased.

One way to think about the challenges inherent in meeting facilitation is to consider various combinations of meeting *place* (same or different) and *number* of facilitators (individual or a team). In Figure 1, we show four quadrants of the resulting two by two matrix. The upper left quadrant illustrates the traditional GSS environment; a single facilitator in a shared physical meeting room. The "distributed GSS" environment (members of the meeting are in different places) is shown in lower left quadrant. In the upper right cell, we find a multi-person

facilitated GSS in which a team of facilitators (or instructors in the case of learning systems) interacts with a group of participants in a shared place. We believe that the final cell (lower right), multi-person facilitated distributed GSS, poses significant new challenges for effective facilitation of very large-scale meetings. Thus, as the scale of the meeting increases, quite often the number of facilitators also increases. This presents challenges for effective training and coordination of the group of facilitators.

	Individual facilitation	Multi-person facilitation
Co-located Meeting	GSS	Team - Facilitated GSS
Distributed Meeting	Distributed GSS	Team - Facilitated Distributed GSS

Figure 1: GSS meeting matrix

Very large-scale distributed meetings

It has become increasingly easy to host very large-scale distributed meetings to gather the collective ideas and decisions of a large group via a corporate intranet. One pioneering large-scale distributed meeting called WorldJam (also referred to as a *massively parallel conversation* (MPC) (Spira, Friedman, & Ebling, 2001) held in May 2001), brought together over 52,000 globally-dispersed employees to discuss a wide range of issues over 72 hours (Halverson, Newswanger, Erickson, Wolf, Kellog, Laff, & Malkin, 2002). While technology enabled large numbers of employees to debate and discuss topics in ten discussion forums, the facilitation teams who mediated, monitored and facilitated these global conversations were critical to meeting's success. These individuals—including experienced on-line facilitators, business executives, and novice communication brokers—helped foster the discussions by posing provocative questions, connecting discussion threads from different areas, helping employees make connections with colleagues halfway around the world, and mining the discussions for relevant

practices and useful insights (Dorsett, Fontaine, & O'Driscoll, 2002; Fontaine, Burton, & Lesser, 2002).

In this paper, we present a case study of the facilitation of a similar large-scale distributed meeting, ManagerJam, and investigate the role and influence of multi-person facilitation teams. There are three characteristics of a meeting of this type. First, this is a meeting on a very large scale. Over 30,000 managers were invited to participate in ManagerJam. Second, a Jam runs nonstop for a bounded period of time. ManagerJam's forums were open continuously worldwide for 48 hours, which presented challenges to facilitators to keep the discussion interesting and lively across multiple time zones, geographies and cultures. The well defined start and stop times for the meeting provided focus and a sense of urgency for those interested in participating. Finally, the size of the meeting and its round-the clock duration necessitated the use of several multi-person, geographically-distributed facilitation teams. These teams were viewed as an important component in facilitating an event that was intended to be much more than an interactive discussion.

Through the following description and analysis of the facilitation activities that supported ManagerJam we will to answer two questions: (1) What are good facilitation practices that can serve as guidelines for future very large-scale distributed meetings? (2) What problems or difficulties did the facilitators encounter and what are the design implications for large-scale computer-supported meeting applications?

Note on method

The ManagerJam research team was comprised of researchers from the firm's various business units who focused on a variety of research topics: including facilitation, participant patterns and behaviors, and organizational effectiveness. Our understanding of the facilitation of ManagerJam was informed by observation of both the pre-meeting planning activities undertaken by the facilitation teams and the Jam event itself. We also performed content analysis on the archival records from the pre-Jam online collaborative workspace (TeamRoom Plus[®])¹ as well as the conversation transcripts of the Jam event itself. Finally, we completed structured interviews with small groups of facilitators (2 to 7 per group) within three weeks after the completion of the ManagerJam event. In all, we interviewed 20 facilitators (out of a total of 48).

¹ TeamRoom Plus [®]Notes Database

Preparing for the Jam

From its conception, ManagerJam was part of a larger human resources initiative to explore emerging issues for managers and to develop new management training and support programs. The mission of the larger project was to “successfully execute a Jam for senior managers and executives worldwide as part of the Manager Development program.” ManagerJam was designed to be a six forum brainstorming session that would surface a good set of challenging management problems and a collection of creative, peer-vetted solutions—all of which could be widely shared and applied. It was expected that the output of the Jam would inform the other elements of the larger human resources program. (These six forum topics can be found in Table 1).

Table 1: Discussion topics for the six ManagerJam forums.

Forum	Forum Discussion Topics
1	Translating Strategy into Results: What do you do to help your people understand the company’s business strategy, and use it to propel their own operational and personal success
2	Building Careers: How do you prepare employees to outgrow their current jobs?
3	Fostering Innovation: How do you encourage appropriate risk-taking, so that your department drives change and grows the business?
4	Managing Performance: What approaches have you found most effective at turning your team into a true meritocracy?
5	The Human Face: How do you use the resources at your disposal to make the company uniquely supportive for your employees
6	The New Customer Landscape: How do you help your people work actively with colleagues across the company to deliver what our customers need today?

Defining the role of moderators, facilitators, and participants

The moderators for each forum were expected to decide which postings were of sufficient interest and importance to be moved into a separate part of the discussion space for voting. In addition to reading and responding to participant postings, facilitators steered the dialogue, encouraged participation and deeper thinking, offered insight into the topic at hand and flagged comments containing ideas or solutions that had the potential for immediate implementation.

The most interesting and actionable ideas that emerged within each discussion fora were selected by facilitators and listed separately for participant voting. ManagerJam participants would be asked to rate ideas as:

1. *Ready now*: it can be implemented as is, and can help the business.
2. *Almost ready*: it needs some refinement...but not much.
3. *Not ready*: There may be something here, but it needs more work.

The best of these ideas would be offered to the Role of the Manager program for subsequent action.

The Jam's discussion and collaboration spaces

The discussion application supporting the Jam conformed to the design standards (look and feel) of the corporate intranet and was accessible from a standard browser. There was a separate *home* discussion page, where a menu displayed access links to each of the six forums. In an individual forum page (see Figure 2), a list of the most recently posted messages was presented with links provided to view earlier messages. A five-line summary of each topic message was provided. Also, a link was provided to drill down and see the complete message and the remaining message thread.

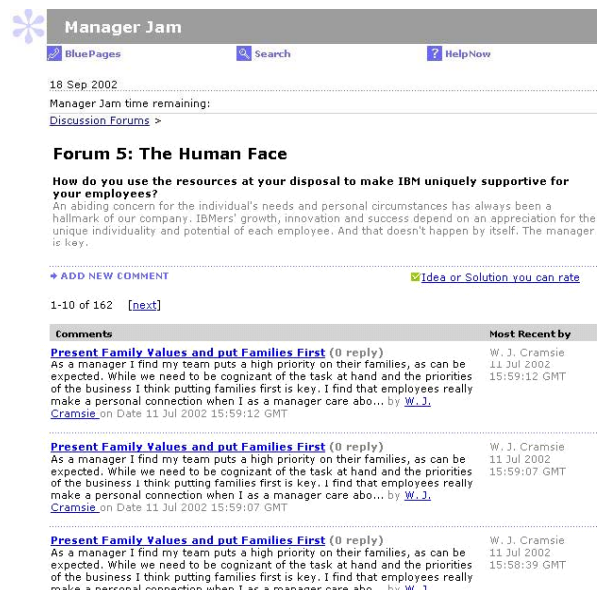


Figure 2: ManagerJam's discussion environment

The discussion forums were hosted on an NNTP (Network News Transport Protocol) server, while the message rating functions were supported by a DB2 server. JSP servlets were used to integrate the forums and the voting tasks.

An online collaborative workspace (TeamRoom PlusTM) was also created for the globally-distributed project and facilitation teams, and the event preparation

proceeded with a mixture of conference calls, email and chat messaging. Facilitators for the Jam were solicited from two organizations: corporate communications (event host) and organizational development (HR program sponsor). For each forum, there was a primary moderator supported by a group of six to eight facilitators.

Facilitator training and preparation

Since the Jam was to be held continuously for 48 hours, many of the teams had representation from different geographies to more easily provide time zone coverage. Teams were encouraged to meet in person (if possible) and remotely several times before the event to plan, prepare and strategize for their forum. Many of core topics required of more traditional GSS facilitators were covered (Yoong, 1995).

To prepare for the Jam and to navigate facilitating in an online environment, a one-day training workshop, a practice session (in the tool) and a short facilitation guide were provided to explain role responsibilities and online facilitation practices. Facilitators suggested that the mix of training methods not only provided their teams with the opportunity to become familiar with one another, but also created a foundation to work from.

In addition to training, facilitators were asked to prepare for the Jam by researching topic areas to better steer and support Jam dialogue. We found this to be quite useful for facilitators to get a general grasp of the topic, given that most were not subject matter experts. One facilitator commented on her experience:

I did a lot of the preparation work just looking on the web and looking through search engines on the topics of innovation and actually found some surprising resources out there that I didn't realize were available. What it did was help me get in the mindset of it. In answering or developing the threads, I found it was good context for helping push the threads in one direction or another.

It is clear that this practice of topic preparation also assisted with facilitation teams' pre-Jam preparation. In future Jams, especially if they are time, resource or topic constrained, the use of subject matter experts trained in the art of e-facilitation may be appropriate.

The importance of schedule and communication strategy planning

As was revealed from the analysis of WorldJam (Fontaine et al., 2002), scheduling and communication are two key elements of Jam success. Facilitation teams who invest in both are better prepared to handle and address any situation that may arise. For ManagerJam, a strong emphasis was placed on operational planning for each of the forum teams. We found this to be extremely helpful in allowing facilitation teams to navigate potential obstacles and barriers. Not only

was time zone coverage, methods of “passing the baton” and scheduling discussed, but also communication strategies and channels were decided beforehand. Teams pointed out that knowing who to turn to and what channel to communicate through greatly assisted in managing background support. One facilitator commented:

...So another area that we really was helpful was that we had to spend quite a lot of time trying to figure out our schedules—in terms of I’m working in AP [Asia Pacific], someone else is in the UK [United Kingdom], someone else is in the US [United States]—and how we are going to time ourselves and hand over process from one facilitator to the other.

Another facilitator suggested that scheduling along with a well-defined communication strategy helped his team stay connected. He stated:

Well, first off we had a schedule and a protocol for exactly what you needed to do in terms of writing a summary of activity, sending that by email and then talking to the next person to facilitate—either by phone or by Sametime chat to confirm that they were on or to just touching base with them. That’s pretty much we passed the baton.

Pre-Jam participant recruiting

Large-scale diffuse meetings of this sort need to use multiple methods to invite and encourage participation in the event. For ManagerJam, facilitators worked both personal networks and organization charts to recruit participants, and created a sense of awareness around forum topics pre-Jam. They also insured an evident online population as the Jam kicked off. The facilitators reported using existing email distribution lists, email directed at specific geographic areas, and special requests for senior managers to solicit meeting participation. Several of the facilitators said that personal quotas were assigned team members to ensure that a significant number of employees were personally invited to the meeting.

During the Jam

Communication among the facilitation teams

The descriptions of the Jam experience offered during our facilitation team interviews indicated that the pre-Jam preparation had paid off. Facilitators communicated frequently with other members of their team in predetermined communication channels (e.g., using the TeamRoom, email, or Sametime chat). Most of the facilitators said that they felt well prepared and found that they actually spent less time devoted to the facilitation task than they had estimated.

During the interviews, it surfaced that there were several different communication styles that developed among the teams. One facilitator described the team interaction during the Jam as follows:

We set up periodic calls throughout the twenty-four hour period. We used somebody's 1-800 number, and we put those in place prior to the event because we hadn't really thought about keeping the Sametime chat window open during the entire period. So we thought one way to make sure that we kind of heard each other's voices and really were able to brainstorm was to kind of put that in play. It worked very well for the first half of the forum. But, by the end, the Sametime chat seemed to work so well we would opt not to have those calls.

A second facilitator described their team interaction in the following manner:

There were certainly some facilitators who gravitated towards the TeamRoom. There were some who actually preferred a [conference] call. But, all preferred Sametime as a constant tool to use throughout the event because it was less obtrusive and actually it was a good way to capture previous conversations. So, you could kind of get up to speed if need be, and we actually used that much more collaboratively when it came to identifying comments for voting and even preparing summaries as opposed to email.

Given the difficulties coordinating the work within each forum, facilitators were assigned to a single team. In one case, to fill a coverage gap for hours covering the Asia Pacific geographies, one facilitator volunteered to help out on a second team. This resulted in an unplanned transfer of learning from one team to another. While helping Team 4, the facilitator noticed that an always-open group chat was an effective and easy way to keep the team informed about the work activities. She was able to transfer the idea to Team 6 on her next shift. The ability to easily share best facilitation practices across forums, as they emerge during the Jam would be a great benefit in cases where more than one team is facilitating a large event.

Facilitating the conversation

The biggest class of problems that arose during the Jam had to do with access or authentication issues. Since this was a restricted meeting, the prearranged list of invited employees was not complete. This is unfortunate, but not altogether surprising given the fact that over 30,000 employees were invited to ManagerJam. The facilitation teams followed the prescribed troubleshooting procedures, including telephoning a special support hotline. Most of these access problems were resolved quickly. There was no evidence of online *deviant* behavior, probably due in large part to the participant job role and the fact that the Jam participants were not anonymous.

One problem that surfaced early for the facilitators was primarily due to the interface design of the discussion tool. For each forum, the list view would only show about 10-12 top-level postings one at a time. During peak traffic times, for

example, at the beginning of the Jam, messages would quickly become buried. One facilitator said:

It seemed like we had seventy-five postings right away and the audience was just coming to post their comment and go. So, you immediately had to navigate through four or five pages of comments. But, if there was a good thought buried on page four and you responded, you couldn't see the response and nobody would see that new comment.

The difficulty navigating through multiple pages of postings resulted in several obvious problems. One facilitator commented:

We definitely had a lot of duplicate ideas. But to be honest, it was very difficult to scroll through and read the entire [postings]. It was a very big investment to read the whole forum before you posted.

To help with these problems, facilitators often posted comments that linked similar discussion topics, encouraging the posters to comment more on each other's postings. This may not have been as effective as expected, since facilitator postings soon became buried in the discourse. Several of the facilitators indicated that it would be nice to have a section of the forum interface that would allow facilitator comments to be more visible.

Additionally, more than one facilitator mentioned that while they had done background research on the topic of their forum, it would have been helpful to have access to subject matter experts during the Jam. For example, one facilitator said:

We found some good stuff, but it would have been even better if we'd had somebody who really had a hook into that subject and could have brought to bare some survey work from outside the company. So we could say, "Okay, this obviously applies to the company, but we know that in 3M, Shell, BT or where ever, this or that actually happens". Bringing this to the Jam, would have been useful.

During the Jam, only one facilitator proactively recruited a subject matter expert who was very knowledgeable in several of the topics that were developing in his forum.

Monitoring and measuring the effectiveness of facilitation teams

During the Jam, the facilitation team generally followed the planned process flow of reading new postings and selectively replying to some of the postings. The facilitators passed interesting postings off to moderators, who selected some postings for voting. An illustrative summary of the conversation activity for three of the forums has been provided in Figure 3.

