

**DisCO**

Distributed Co-design

# Planning, Designing and Facilitating Online Events with Microsoft Teams

Community and Public Sector cluster - Beyond Imagination  
ImaginationLancaster  
Lancaster University

# Planning, Designing and Facilitating Online events with Microsoft Teams





# Contents

6	Principles for Planning, Designing and Facilitating online events
8	Planning events with Microsoft Teams
10	Designing creative interactions with Microsoft Teams
14	Facilitating events with Microsoft Teams

# Principles for Planning, Designing and Facilitating online events

In our DisCO (Distributed co-design) pilot studies, we proposed a set of principles to work collaboratively in digital environments that are clustered in the three co-design layers of practice: Planning and Facilitating events, and Designing creative interactions. Building on the proposed set of principles, this report presents how to put them in practice using Microsoft Teams

## PLANNING EVENTS

### Define the appropriate distributed co-design approach and the online platform

This involves really thinking about the people in the group that you are trying to engage. It is important to know the number of participants and their technical limitations, and set requirements prior online events (e.g. smart phone or computer). Sometimes you just need to phone call or send text or voice messages to keep a session low-tech, or a combination of them in an asynchronous workshop, to avoid broadband issues.

The platform is analogous of the location of a physical workshop. Sometimes it could be just phone calls, but the online environment is the location where the creative interactions will happen. Some platforms are more appropriate for different size of groups and people. Defining what is right for the context requires studying the technology that people are most comfortable with and then devise bespoke engagement approaches.

### Make clear the expectations of online virtual meetings at the beginning

Start small and try to establish connections: Make people feel comfortable about the virtual environment to let them less worried, concerned and pressured about achieving similar outcomes as physical workshops.

The attention span of participants in an online workshop is shorter than physical workshops. Devising a distributed multiple light touch over a day or week could enable a better way to keep participants engaged in a project.

## DESIGNING CREATIVE INTERACTIONS

### Think about what interactions are needed to enable creative exchange.

The type of interactions affects the flow of the event. Introducing many new techniques in one session could be overwhelming, requiring extra time to allow participants to familiarise with the platform and to respond to tasks.

### Get beyond the screen.

Designing activities that make people move around can introduce physical activities and provide fun. Creating these interactions can provide this sense of fun and more human connection in an online session. For example, you can ask participants to find objects related to the activity you are proposing to help them to warm up for what is coming next and to learn basic online interactions, such as turning on/off microphones and video. Ice breakers and coffee breaks are often used to get to know someone better.

### Design simple activities with tools for remote teams (e.g. google docs, Miro):

You should limit the instructions to simple tasks, such as listing, sorting, highlighting when using interactive tools. Make sure these instructions are visible to participants when they are responding to a task. A programme guide is important to enable better creative online exchange and interactions. This could help to reduce anxiety towards the completion of the task and use of technology (e.g. Miro and Mural have a sidebar showing the steps to be taken in a task). A facilitator in each break out room might be

required to assure participants are doing right.

### Simplify interactions

Avoid multiple interactions at the same time. Breaking down creative interactions in different windows/spaces can help participants in making sense of activities. Assigning participants to small groups can also reduce the number of interactions on their screen. For example, you could instruct participants to use video only for discussion and ask the group to agree on who will do what when generating inputs to avoid confusion.

## FACILITATING EVENTS

### Assign co-facilitators roles to team members (Wing person and technical producer):

In physical workshops, a wing person is the one who gives support to the main facilitator, making sure participants understand task and do it right. They might also be taking pictures, handing over proformas, and observe the session as an outsider. A technical producer or director is the one who creates interactive mechanisms to support online sessions, making sure all the digital material and infrastructure are ready to deploy and assist the main facilitator. Technical producers can plan events to work over a day or a week to support participants in co-designing desired outputs with less active facilitation. During online sessions, the wing person could keep the flow and engagement of participants between transitions while a technical producer can prepare the stage for facilitation. A back-up group can support the communicate between the main facilitator and co-facilitators.

### Role-play the planned ideas

This is similar to designing a creative facilitation approach for a face-to-face workshop, where an iterative process of planning, prototyping and testing a session would support the improvement of the overall workshop. Running through the online event helps to identify the technical nuances and issues that might happen during the event. When testing your online event, invite your colleagues with the appropriate literacy for your session in order to spot things that could go wrong.

### Provide visual cues:

adding cues allow people to navigate easily through the online session by providing points of reference as they work through it. For example, adding a compass to the presentation slide or highlight important parts of it using coloured squares can assist the presenter to indicate an information and enable participants to locate it in the slide, supporting a good flow of the event. Make sure you upload all the materials you will use to keep the event running.

### Use mechanisms to understand the mood of participants

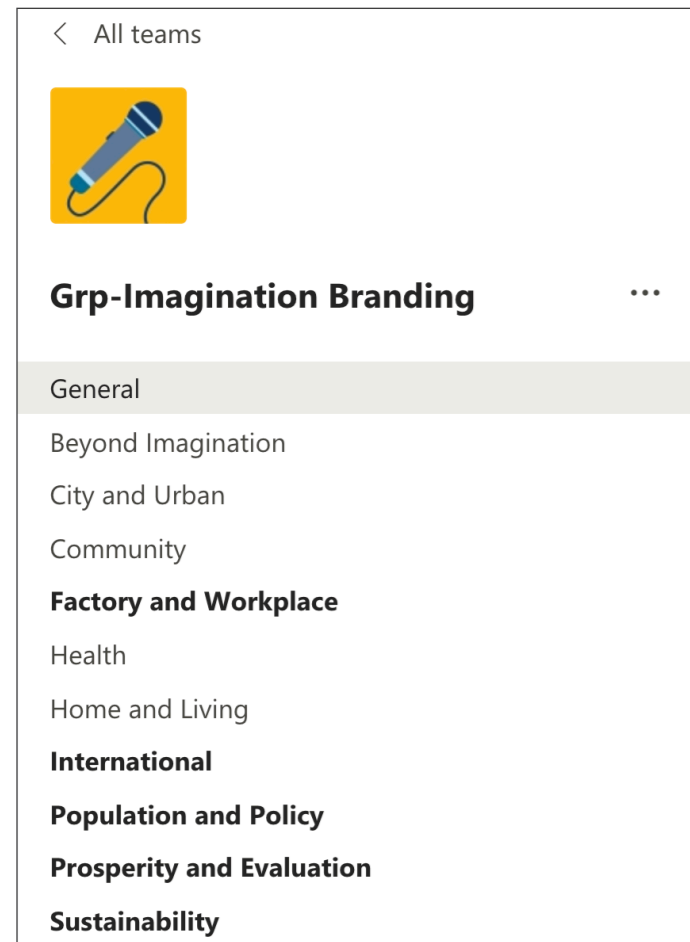
as you will not be able to grasp situation and their body language hints, you can use scales, emojis or creative mechanisms to enable participants to identify their mood during the event. You can explore and encourage the use of the online language, such as Gifs and memes if they are appropriate for the context.

# Planning events with Microsoft Teams

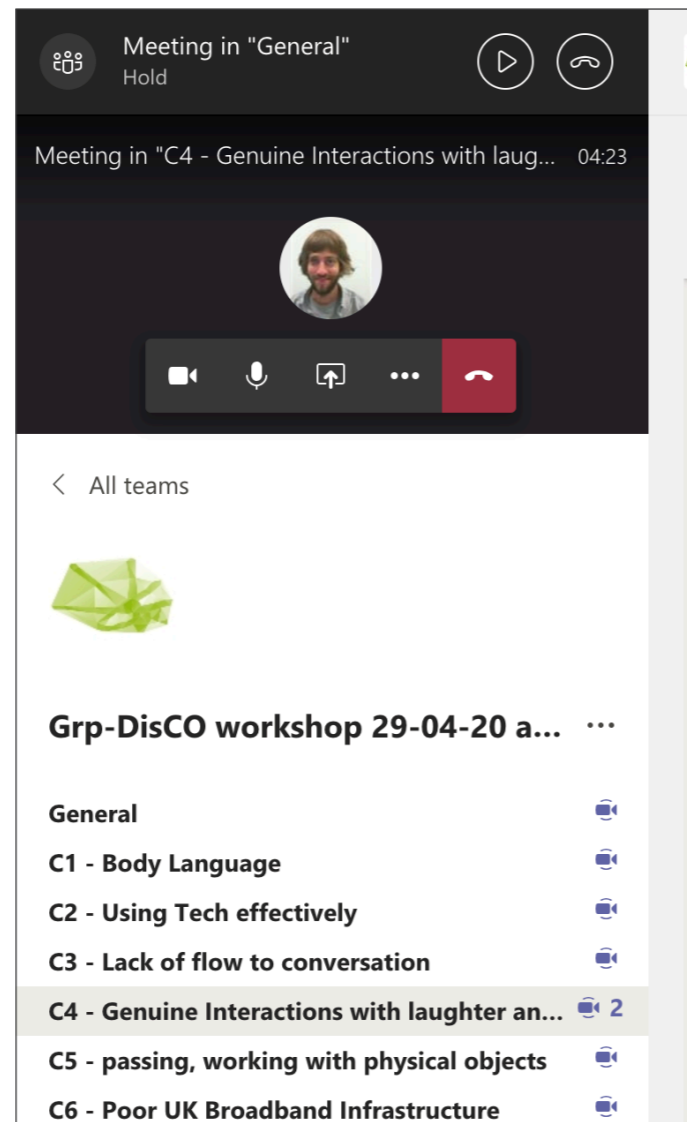
Teams has a more complex interface but enables different creative interactions through an integrated set of applications for doing collaborative work and shared cloud system such as Word, PowerPoint, and OneDrive, Box or Egnhyte. It centralises projects in one platform, enabling people to share updates, connect on a call and collaborate with partners using market dominant Office productivity suite. Knowing what Teams can do enables you to plan interesting events.

## Channels

The place for everything related to a project, topic or team. It allows planning asynchronous or synchronous events, where everyone can share files and updates.



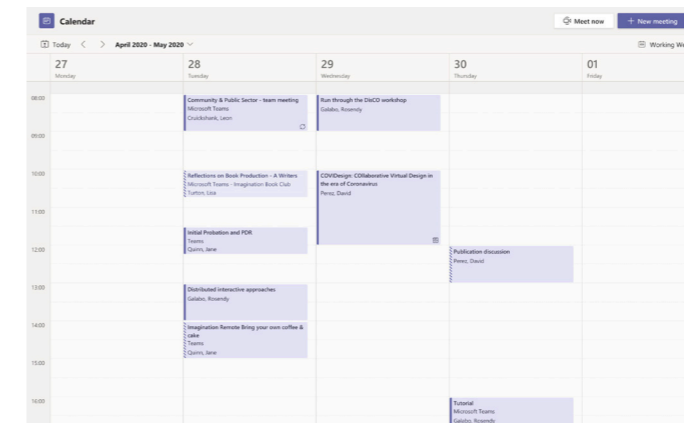
In this example, multiple conversations were happening at different times, where participants were collaboratively sharing ideas for a project



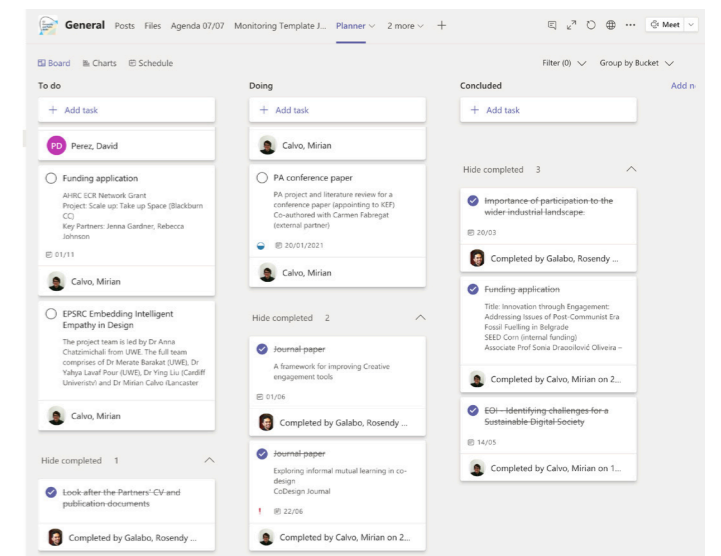
In this example, multiple video calls were happening at the same, where participants were collaboratively working on different powerpoint files.

## Planner and calendar

You can set deadlines and arrange virtual meetings for your asynchronous or synchronous events.



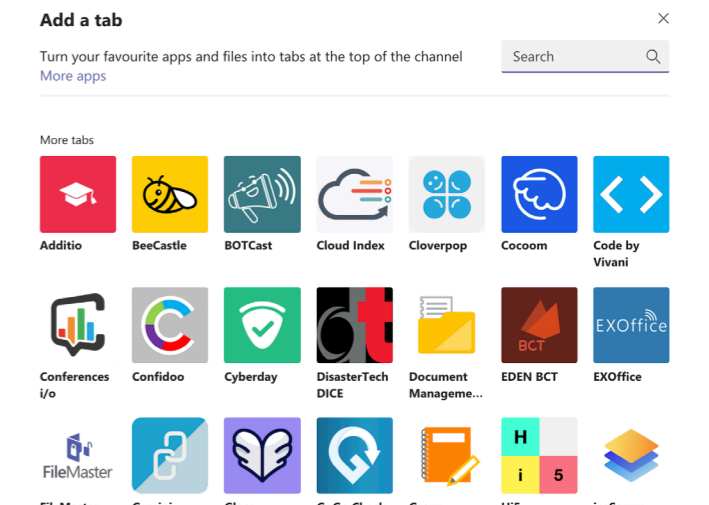
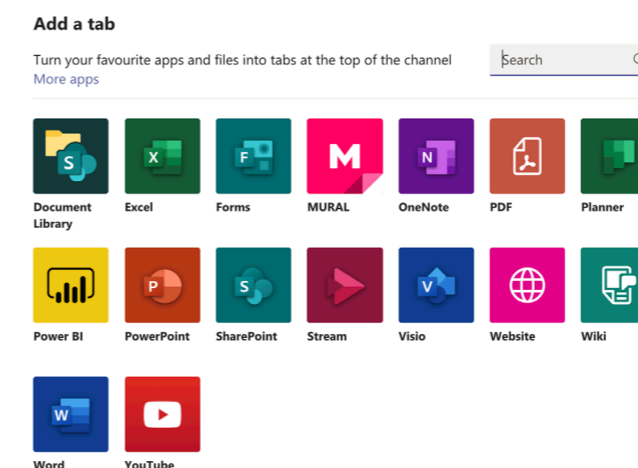
When virtual meetings are created, invitees can join the meeting from the calendar



You can assign tasks and deadlines to members of the Team using Microsoft Planner, a tool that is similar to Trello

## Favourite apps into tabs

Teams allow to integrate other external tools, such as miro and mural

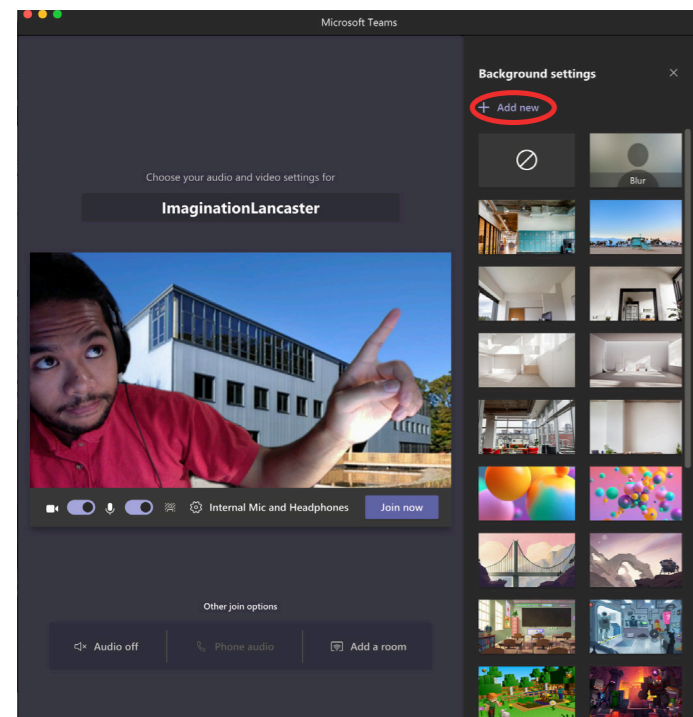
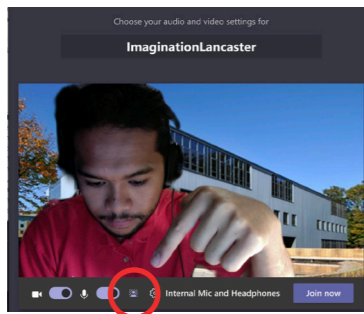


# Designing creative interactions with Microsoft Teams

Teams allows a few interesting creative interactions due to the available chat features, integrated Office productivity suite in the platform, shared features. Knowing the features that Teams and other Microsoft and external tools can do enables the design of more creative conversations. Make sure to keep your interactions simple.

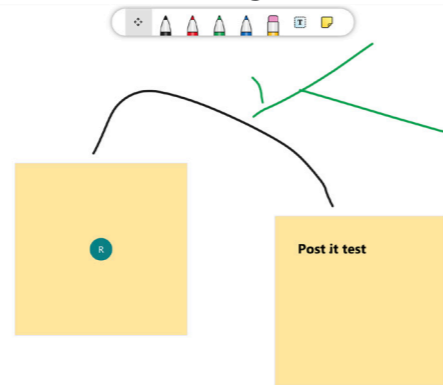
## Having a shared virtual meeting background

Teams has an easy way to add an image or video as a virtual background. Once participants join a meeting, a small window will pop up, showing a button in the bottom to add a virtual background. When inviting participants to attend an online meeting, you can send a background image in advance to make the environment an even field, more accessible and more equal or to identify members of a group.



## Shared whiteboard or screen

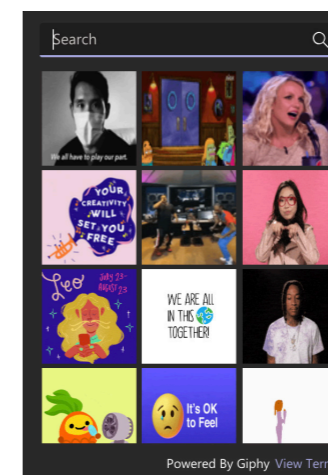
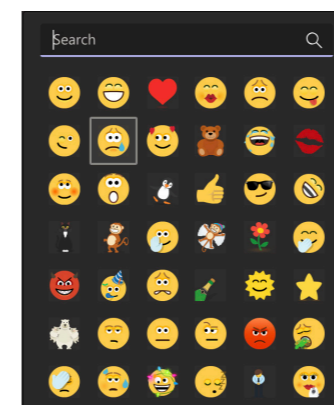
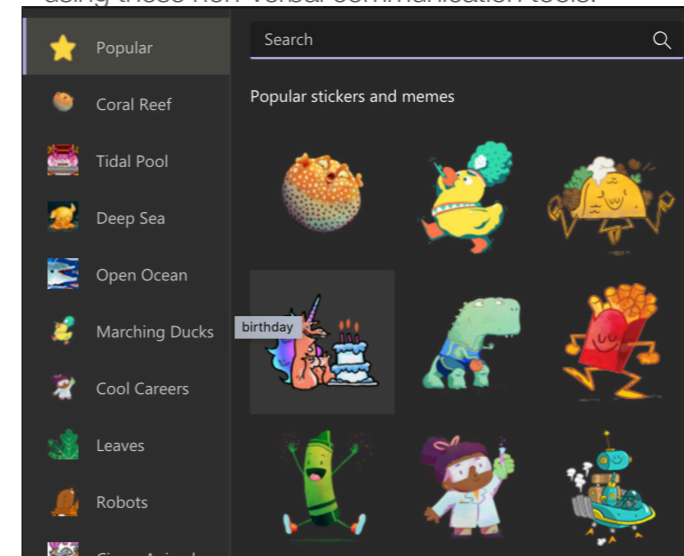
A shared whiteboard enables participants to do basic actions (draw, type and stick post-it notes), similar to physical whiteboards. \*Undo\* actions are not available when using this feature.



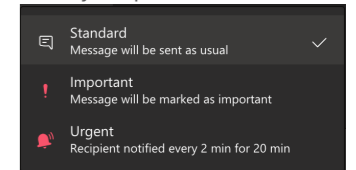
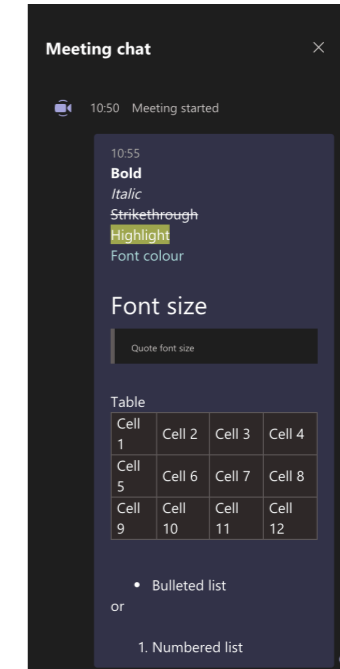
When sharing a Power Point presentation, although the mouse cursor will not show on other participants' screens, you can enable them to navigate through the slides privately and go forward and backwards. If you decide to use this feature, make sure to provide visual cues to participants, so they can locate themselves in your presentation. When sharing a window app or desktop, participants will be able to see your cursor.

## Advanced meeting chat

Teams allows the use of internet language, such as gifs, emojis, stickers and reactions to messages. These advanced features can be used to enable creative interactions such as voting, and fun activities that involve the use of memes. You can also ask participants to react to your questions using these non-verbal communication tools.



Other available features include changing character styles, creating tables, and define message priorities (Important, urgent), which enable a richer information than just plain text.



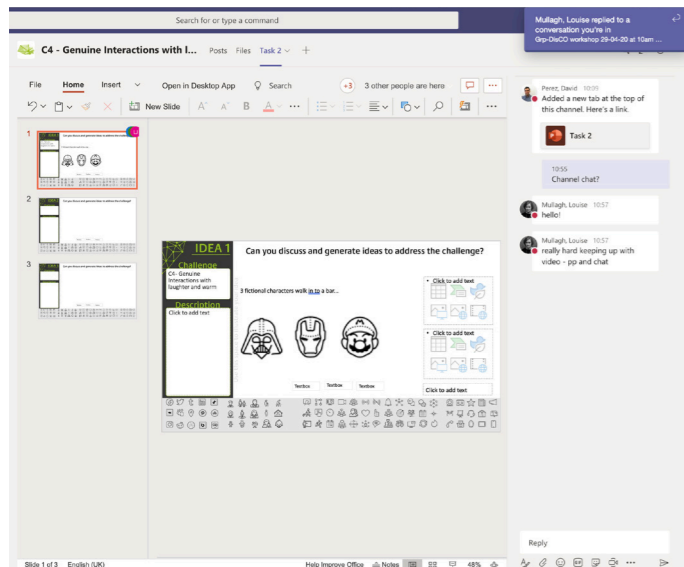
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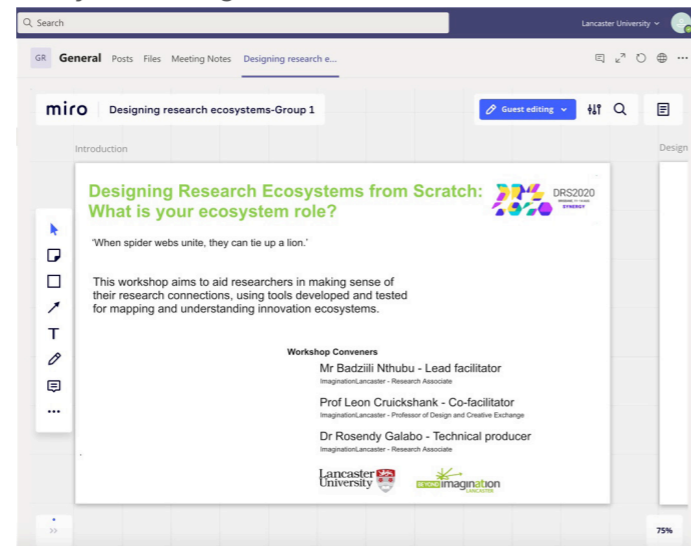
## Integrating internal and external applications to enable richer creative interactions

Teams allows adding other Microsoft applications or external ones to the interface, enabling a broad range of creative combinations and possibilities to work in groups. Having knowledge in Office productive apps, such as Microsoft word, and Power Point can enable their use in creative ways as they can be considered familiar and basic tools used by people with low digital literacy. For example, you can use shared Excel file for running a workshop for increasing team collaboration, a shared Power Point slide as a support for using digital proformas in an online workshop, or even Miro as illustrated in this spread. The most appropriate applications are the ones that can meet the requirements of your research and audience needs and skills.

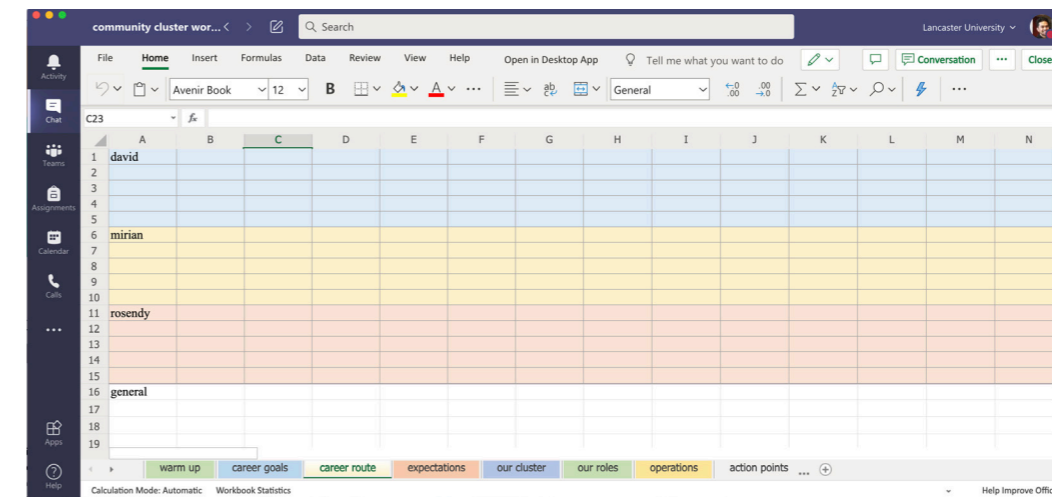
## A workshop using shared Power Point slides for doing creative interactions



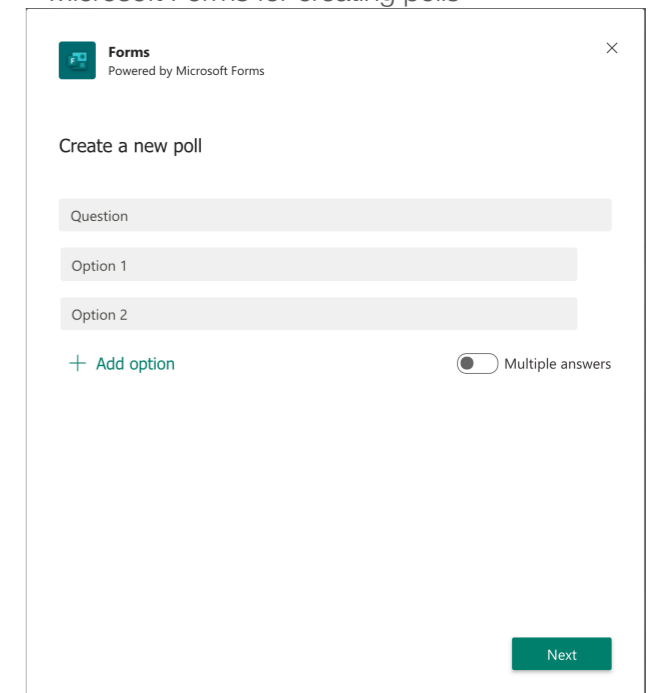
## A workshop for designing innovation ecosystems using Miro



## A workshop for increasing team collaboration using Excel



## Another useful Microsoft application is Microsoft Forms for creating polls



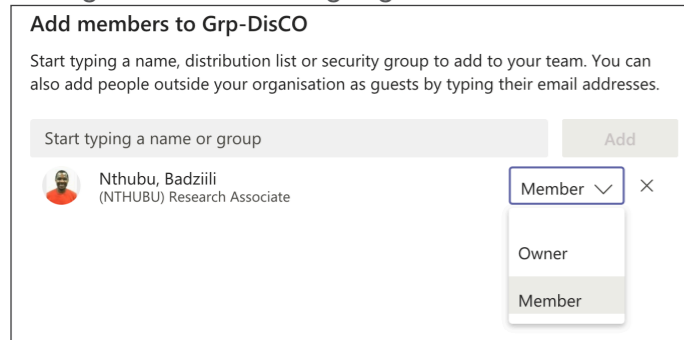
# Facilitating events with Microsoft Teams

When facilitating online events, assigning tasks to your team can help you to deliver a good session. Having team members dedicated to manage the mediating technology and support participants in need of assistance can make sure the session will run smoothly. To overcome the lack of visual cues, asking participants to use non-verbal mechanisms (e.g. such as emojis, gifs, and sticker) and creating a back-up group (e.g whatsapp, organisers chat) can improve communication between participants and organisers. Guiding participants to have different group conversations using Teams requires having Channel links and meeting calls ready for the activity. Assigning existing roles in Teams (Owner, member, and guest) and Teams meeting (Organizer, Presenter, Attendee) to participants will allow them different interactions on Teams.

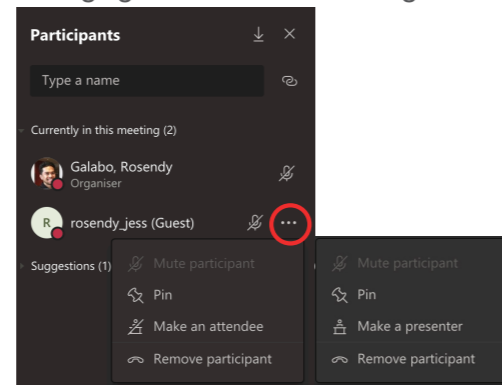
## Assigning roles on Teams and Teams meeting

As the owner (creator) of a Team, you can change Members and Guest permissions, enabling and disabling interactions as illustrated in the image below. When adding members to a Team, members of your organisation (usually emails person@organisation) are assigned as a member whereas outsiders are assigned as guests. In Teams meetings, the roles have fixed permission. In essence, organizers and presenters can share content and manage participants, and attendees can only visualise, participate in meeting chat and speak and share their videos

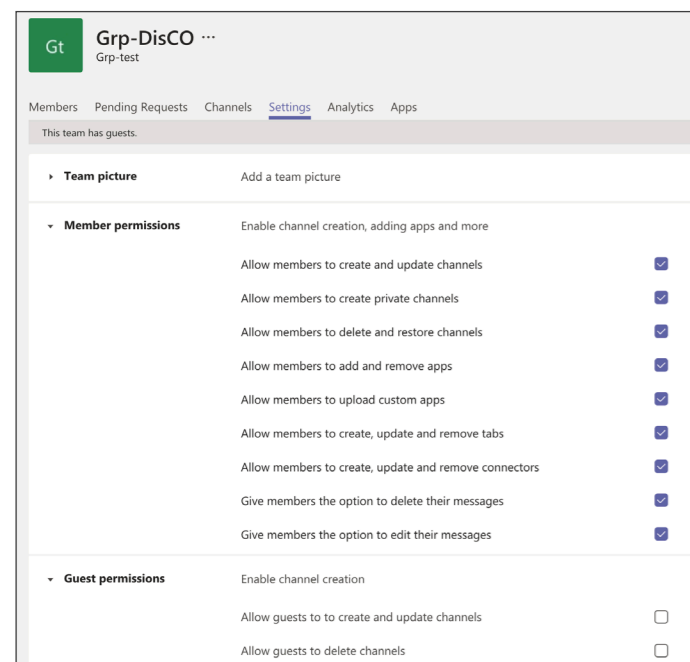
### Adding members and assigning roles



### Changing roles in Teams meeting



Capability	Organizer	Presenter	Attendee
Speak and share video	✓	✓	✓
Participate in meeting chat	✓	✓	✓
Share content	✓	✓	
Privately view a PowerPoint file shared by someone else	✓	✓	✓
Take control of someone else's PowerPoint presentation	✓	✓	
Mute other participants	✓	✓	
Remove participants	✓	✓	
Admit people from the lobby	✓	✓	
Change the roles of other participants	✓	✓	
Start or stop recording	✓	✓	

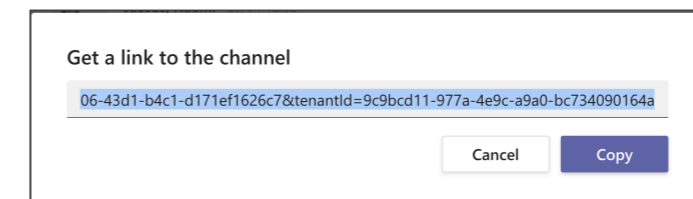
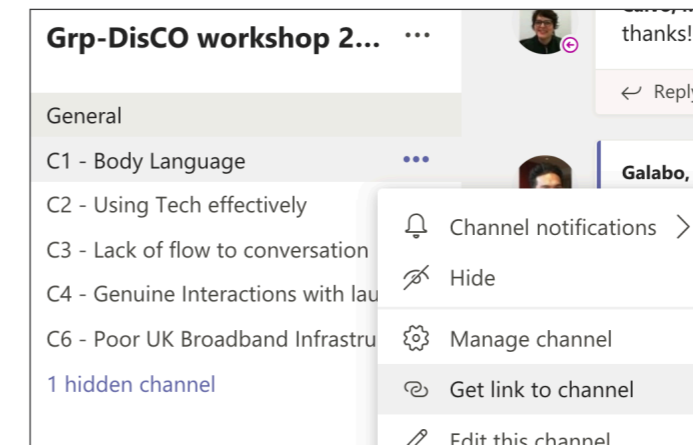


## Tagging participants, channels, or everyone to call their attention.

You can mention participants, channels or everyone by typing @name / group / general anywhere on Teams to inform them about an activity or get their attention. This function is useful to call people back to a main meeting on Teams.

## Using links and invitations to a Teams meeting to guide participants in your interactions

To create small groups, you can either start a new meeting and request participants to join it, or you can direct participants with links and ask them to start new meetings in the channel they are assigned as illustrated as follows (below and right)



## Using mechanisms to understand mood: Reactions and non-verbal communication

When presenting or facilitating an online session, ask participants to react to your questions using non-verbal communication tools in the participants panel, such as or raise up your hand or any of the advanced chat features such as emojis, gifs or stickers.

