FPP Special Edition Virtual Session – April 2020
“Virtual Meetings That Work: Connecting With Those We Serve Through Technology During and After COVID-19”
Barry Altland
Director, Partner Engagement
Who/What is FPP?

FLORIDA PROSPERITY PARTNERSHIP
A Thank You to FPP’s Funders
Questions/Inquiries/Connection

FPP@FloridaProsperityPartnership.org
Upcoming Virtual Learning Opportunities

https://FloridaProsperityPartnership.org/events/
Virtual Meetings That Work
Connecting With Those We Serve Through Technology During and After COVID-19

Greg Owen-Boger, Vice President

If you haven’t already, download and print today’s handout.

The document is in the Handouts feature.
Frustration in web meetings
Our Vision

At Turpin Communication, we envision a future where meetings, presentations, and training sessions are the least frustrating parts of doing business.
My Goal for You

Move business forward effectively & efficiently in meetings.

(Virtual or not.)
Our Work

Presentation Skills Training

Meeting & Facilitation Skills Training

Training for Trainers

Live and Virtual
Housekeeping

• Ask questions when they bubble up
  – Ask within the chat feature

• Reduce distractions
  – Email
  – Instant messaging
  – Etc.

• Cell phone ringer off, not on vibrate

• This session is platform agnostic
Challenges People are Facing

Technical comfort for everyone

Engagement, connecting, & establishing trust

Efficiency & effectiveness, keeping things on track
Anything else bubbling up for you?
I’ll be speaking about best practices.

Think about how they apply to the unique work that you do and the platform you use.

How does this apply to my team?
How does this apply to one-on-one interactions?
Guiding Principles

Ground Rules for Effective Meetings

Agenda
Guiding Principles

Ground Rules for Effective Meetings
Guiding Principles

The Orderly Conversation
Business Presentations Redefined

Dale Ludwig
Greg Owen-Boger
The Orderly Conversation

Orderly:
- preparation
- accuracy
- structure

Conversation:
- engagement
- spontaneity
- interactivity
The Orderly Conversation Process

Orderly (Planning)
Looking AHEAD to uncertainties of the conversation

Conversation (Presenting)
Adapting what was planned to what's happening IN THE MOMENT
Default Approach

Who are you more like?

**WRITERS**
Thrive with organization and preparation
But can be inflexible and strict during delivery

**IMPROVISERS**
Thrive with connection to listeners
But can lose focus and confuse during delivery
Big Picture Recommendations

WRITERS

Trust Yourself
Eye on the Big Picture
Flexibility

IMPROVISERS

Trust the Plan
Eye on the Goal
Structure is for Them

Assessment and Additional Recommendations Available
Find your focus. Be yourself. Only better.
Business Communicators Succeed on Two Levels

First Level
The Plan

Achieve the Goal
Buy
Agree
Align
Learn

Second Level
The Process

Manage the Conversation
Create the conditions for a fruitful discussion
Earn trust & good will
Make it easy
Manage the give & take
Nurture relationships
Agenda

Guiding Principles

Ground Rules for Effective Meetings
Ground Rules for Effective Meetings

As Facilitator of the Meeting:

Before the meeting, I will:
- Send the agenda and any pre-meeting materials;
- Select the appropriate attendees.

To earn your trust, I will:
- Share the context and goals of the meeting;
- Communicate what I am trying to accomplish.

To earn your participation, I will:
- Deliver information you need;
- Clearly & concisely.
- Keep communications focused and relevant.

When you speak, I will:
- Listen to understand your perspective;
- Your words count.

When the meeting is over, I will:
- Summarize the next steps;
- Follow up with you.

As Attendees of the Meeting:

Before the meeting, we will:
- Review the agenda and materials;
- Be prepared, including any pre-meeting requests.

We will respect you when you:
- Provide context;
- Clearly communicate what you are trying to accomplish.

We will participate fully when you:
- Make it easy for us to do so;
- Make it work for us.

When we speak, we want to feel that:
- We are heard;
- Your feedback and input are valued.

When the meeting is over, we will:
- Agree to next steps;
- Follow through and communicate.

Ground Rules for Effective Meetings

**As Facilitator of the Meeting**

- Before the meeting, I will
  - Solidify the plan and set expectations
  - Select the appropriate attendees

- To earn your trust, I will
  - Place the conversation in the context of your work
  - Communicate what I’m trying to accomplish

- To earn your participation, I will
  - Deliver the information you need clearly & concisely
  - Keep the conversation focused and truthful

- When you speak, I will
  - Value your input
  - Work to understand your perspective

- When the meeting is over, I will
  - Summarize and set next steps
  - Follow up with you later

**As Attendees of the Meeting**

- Before the meeting, we will
  - Clear schedules for the allotted time
  - Get prepared, including any pre-meeting requests

- We will trust you when you
  - Provide context
  - Clearly communicate what you’re trying to accomplish

- We will participate fully when you
  - Make it easy for us to do so
  - Make it worth our time

- When we speak, we want to feel that
  - We are being heard
  - You welcome and value our contribution

- When the meeting is over, we will
  - Agree to next steps
  - Delve into our promises

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Turpin
Communication
Business Communication: Unchanged
Positive Meeting Culture Requires Full Participation From Both Groups

Shared Commitment

As Facilitator of the Meeting
As Attendees of the Meeting

Before the meeting, we will:
- Solidify the plan and context
- Select the appropriate meeting mode

To earn your points:
- Place the context
- Provide the context

During the meeting, we will:
- Manage the time
- Address any pre-reading requests
- Let you when you need to speak

After the meeting, we will:
- Communicate what was agreed upon
- Communicate any next steps

As Facilitator:
- Be clear on the agenda
- Be clear on the objectives

As Attendees:
- Be clear on their role
- Be clear on their objectives
Positive Meeting Culture Requires Full Participation From Both Groups

As Facilitator of the Meeting

Before the meeting:
- Solidify the plan and agenda.
- Select the appropriate location.

To earn your credibility:
- Place the context.

Remember... This is part of your job now.
When We Are Engaged

- Are here, now (in the moment)
- Are self-aware & in control
- Feel comfortable
- Know instinctively what to do/say, as in everyday conversation

Able to think on our feet

This is hard work in the virtual world.
Primary Engagement Skills

Pausing & Thinking

Eye Contact to Connect and Observe
Virtual Considerations

Pausing & Thinking

Eye Contact to Connect and Observe

It’s not mutual
We Recommend Video Whenever Possible

(Especially Now)
Engaging the Camera

Look into camera when speaking
Keep things friendly
Keep your face bright
Expect a delay
Remain engaged the entire time, especially when you’re listening

Focus on how you’re being perceived, not how it feels
Technical Considerations – Support Your Brand

- Camera
- Camera placement
- Lighting
- Audio
Camera Upgrade

Camera on Tripod

Technical Considerations
Camera Placement

Camera is at eye level
Camera Placement

Head is too low in the shot
Camera Placement – Rule of 3rds

Eyes are in the upper 3rd
Lighting

More light in front than in back

Light from the side adds depth
Sound Quality

Headset or earbuds (not speaker phone)

Best quality audio connection available
Bottom Line… All of these people might be engaged and paying attention, but they don’t all look like it.

Find your focus. Be yourself. Only better.
Virtual Tools (Your Spinning Plates)

Video
Whiteboards
Breakout rooms
Presenter handoffs
Chat
Hand-raising
Document sharing
Annotation tools
Virtual Tools **Should** Be Planned in Advance

and

does **Can Be Used** …or NOT On-the-Fly
Virtual tools are generally more necessary the more formal your meeting is or the more people involved, and you should consider having someone take the role of host.
You and Your Host: It’s a Partnership

Facilitator role:
• Engagement
• Content
• Reaching goal of meeting

Host role:
• 2nd pair of eyes and hands
• Manage technology
• Handle problems
• Monitor chat & hand raising

You might not be able to do it all
Build Capability Among All Team Members

Options:
- Rotate responsibility
- Share responsibility by co-hosting with co-presenter
- Assign a dedicated host... and have a back-up...
Ground Rules for Effective Meetings

Preparation is Critical

As Facilitator of the Meeting, we will:

Before the meeting, we will:
- Clear schedules for the allotted time
- Get prepared, including any pre-reading requests

Before the meeting, I will:
- Solidify the plan and set expectations
- Select the appropriate attendees

To earn your trust, I will:
- Place the conversation in the context of your work

We will trust you when you:
- Provide context
- Clearly communicate what
**Preparation Continuum**

**After Content is Created**

<table>
<thead>
<tr>
<th>Wing it</th>
<th>Get your head together</th>
<th>Dry run</th>
</tr>
</thead>
<tbody>
<tr>
<td>Informal</td>
<td>Formal</td>
<td></td>
</tr>
</tbody>
</table>
Arrive Early

Prepare your physical environment

– Check camera/lighting
– Ready the “room”
– Clear work area
– Silence phones & notifications
– Have something to drink
– Deal with children, spouses, and pets (your new co-workers)
Start the Session Off Right

Greet and welcome participants

Use lobby time purposefully

Check in with your team

Start on time (if you can)
Create the Conditions for a Fruitful Discussion

Trust

To earn your trust, I will
- Place the conversation in the context of your work
- Communicate what I'm trying to accomplish

Before the meeting, we will
- Clear schedules for the allotted time
- Get prepared, including any pre-reading requests

We will trust you when you
- Provide context
- Clearly communicate what you're trying to accomplish

To earn your participation,

Before the meeting, I will
- Solidify the plan and set expectations
- Select the appropriate attendees

We want to feel that
- It's easy for us to do so
- This is worth our time

When you speak,
- Value your input
- Work to understand your perspective

You welcome and value our contribution
Business Communicators Succeed on Two Levels

First Level
The Plan

Achieve the Goal
- Buy
- Agree
- Align
- Learn

Second Level
The Process

Manage the Conversation
- Create the conditions for a fruitful discussion
- Earn trust & good will
- Make it easy
- Manage the give & take
- Nurture relationships
Frame the Conversation

Introduction

Body

Conclusion

Direction
Purpose
Context
Reason to Participate
**Framing Strategy**

**Audience’s Current Situation**

Frustration with process

**Goal**

Roll out new process

**Agenda**

1. What’s not working
2. App
3. New features
4. Next steps

**Benefits to Them**

Less frustration
Quicker turnaround

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**Example #1**

*Team Meeting*

**Introduction**

**Body**

**Conclusion**

**Purpose**

**Context**

**Direction**

**Assume they are distracted**
Example #2: Staff Meeting

**Audience’s Current Situation**
Weekly Staff Meeting
Lots going on

**Goal**
Get everybody on the same page

**Agenda**
1. Round robin update
2. Update on new community partners

**Benefits to Them**
Know what’s on everybody’s plate
Example #3
FPP client budget review

**Audience’s Current Situation**
There’s a lot of uncertainty right now

**Goal**
Review the household budget update

**Agenda**
1. Review expenses
2. Revisit needs/wants/priorities

**Benefits to Them**
Get clear on short-term and long-term savings
Frame the Conversation

- Introduction
- Body
- Conclusion

Direction
Purpose
Context
Reason to Participate

Your promise of relevance & efficiency
Frame the Conversation

Framing Strategy Worksheet
Designed to help you organize your thoughts as you prepare for a presentation.

- STEP 1: Identify Your Goal
- STEP 2: Assess Your Audience
- STEP 3: Name Their Current Situation
- STEP 4: Organize Your Agenda
- STEP 5: Identify Benefits in Your Audience

will be sent to you via email post-webinar later today
To earn your trust, I will:
- Place the conversation in the context of your work
- Communicate what needs to be accomplished

We will trust you when you:
- Provide context
- Clearly communicate what needs to be accomplished

To earn your participation, I will:
- Deliver the information you need clearly & concisely
- Keep the conversation focused and fruitful

We will participate fully when you:
- Make it easy for us to do so
- Make it worth our time

Work to Earn Their Participation

Listen

Be Present

When the meeting is over, I will:
- Summarize and set next steps
- Follow up with you later

When the meeting is over, we will:
- Agree to next steps
- Deliver on our promises
Facilitating Discussions
(keeping the conversation focused and fruitful)
Facilitating Discussions
(keeping the conversation focused and fruitful)

You might need to teach them how to participate in virtual sessions

Take responsibility for setting expectations
You Probably Have a Preference

(which might lead to unintended consequences)

Which means you might:
- Ask too many questions
- Get off track
- Let discussions go too long
- Run out of time

Which means you might:
- Stifle discussions
- Interrupt
- Skim the surface
- Ignore individual’s needs
On the encourage side...

Virtual meetings require more encouragement for participation

Don’t let participants hide

Cameras help
Address questions, comments and concerns as they bubble up.
Ask Questions To:

- Encourage participation
- Confirm understanding
- Tap into experiences, perspectives, and ideas
- Allow participants to hear from one another
What do you think, Mark?

Maria just chatted that she thinks …

Lee, what are your thoughts?

Sarah, do you have anything to add?
We also suggest you... be OK with silence.
Virtual Tools that Help Encourage Participation

- Video
- Hand raising
- Chat
- Annotation tools
- Polling
- Whiteboards
- Sharing documents
- Sharing screens
- Breakouts

Improves Focus for Them
Virtual Tools that Help Control the “Room”

- Video
- Hand raising
- Chat
- Annotation tools
- Polling
- Whiteboards
- Sharing documents
- Sharing screens
- Breakouts
Techniques to Control

Use directional language
Keep the goal in mind
Stick to the agenda
Keep explanations short
Ask closed questions
Use parking lot
Don’t be afraid to step in
Use tools judiciously and with purpose.
Listen, Be Patient
Connect Dots
Build Off What’s Come Before
Probe, Check In More

Mutual Respect

When you speak, I will
Value your input
Work to understand your perspective

When we speak, we want to feel that
We are being heard
You welcome and value our contribution

When the meeting is over, we will
Agree to next steps
Deliver on our promises

Summarize and set next steps
Follow up with you later
Follow-up is Critical

When the meeting is over, I will:
- Summarize and set next steps
- Follow up with you later

When the meeting is over, we will:
- Agree to next steps
- Deliver on our promises

To earn your participation, I will:
- Deliver the information you need clearly & concisely
- Keep the conversation focused and fruitful

When you speak, I will:
- Value your contribution
- Work to understand your perspective
- Make it easy for us to feel that you're being heard

We will participate fully when you:
- Make it worth our time
- Make it easy for us to do so
What would you add?

Use this with your team.

We can customize and co-brand with your organization
Find your focus. Be yourself. Only better.
Q&A
Free 90-minute Webinars Regularly Scheduled

www.TurpinCommunication.com
We’re Here to Help

Presentation Skills Training

Meeting & Facilitation Skills Training

Training for Trainers

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Disclaimer

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This document was used in support of a live discussion. As such, it does not necessarily express the entirety of that discussion nor the relative emphasis of topics therein.
The Bureau’s Mission and Vision

MISSION
To regulate the offering and provision of consumer financial products or services under the Federal consumer financial laws and to educate and empower consumers to make better informed financial decisions.

VISION
Free, innovative, competitive, and transparent consumer finance markets where the rights of all parties are protected by the rule of law and where consumers are free to choose the products and services that best fit their individual needs.
Commitment to supporting consumers

The CFPB is committed to providing consumers with up-to-date information and resources to protect and manage their finances during this difficult time and as the situation evolves.
Central hub on ConsumerFinance.gov
Resources in English and Spanish
Check back for updates
Content topics and themes

- Protect yourself financially
- Submit a complaint if you are having a problem with a financial product or service
- Protecting your credit
- Tips for financial caregivers
- Dealing with debt: Tips to help ease the impact
- Student loan repayment
- Be aware of scams
- Mortgage relief options
- More to come...
Social media resources

- Facebook: facebook.com/CFPB
- Twitter: @CFPB
- YouTube: youtube.com/cfpbvideo
Financial Education Exchange (CFPB FinEx)

An online and in-person opportunity to access Bureau tools and resources, and connect with the Bureau and your peers engaged in financial education.

Our goal is to help you improve the financial well-being of the people you serve.

Regional convenings:
- Dallas, TX
- Fort Worth, TX
- Denver, CO
- Kansas City, MO
- Atlanta, GA
- Sacramento, CA
- Madison, WI
- St. Louis, MO
- Tacoma, WA
- Nashville, TN
- Boston, MA
- Salisbury, MD
- Holloman AFB, NM
- Los Angeles, CA
- Weston, WV

Monthly e-newsletters
- Biennial Conference

Number of financial educators signed up for CFPB FinEx: Over 13,000 Members!

To sign up, email CFPB_FinEx@cfpb.gov

Monthly webinars include:
- Fraud prevention for older adults
- Disaster recovery and preparedness
- Resources for servicemembers
- Accessing credit scores
- Managing spending
- Debt collection resources
- Credit card spending
- Libraries as Financial Education Resources
- Financial Coaching
- Financial Education Programs
- Serving Immigrant Populations
- Federal Financial Education Resources
- Take Control of Your Auto Loan
- Financial Rules to Live By
- Resources for Parents
- Tips for Strengthening Financial Education Curriculum
- Resources for Parents and Caregivers
- Resources for Financial Caregivers
- Measuring Financial Well-Being
- Owning a Home
- Tax Time Savings
- Your Money, Your Goals Toolkit

http://www.linkedin.com/groups/5056623
Financial Education
Money Topic Resource Portal
Financial education for adults

We help you help the people you serve. For adult financial educators, the tools here show our latest thinking on consumer financial behavior and effective financial education practices.

Upcoming webinar: Helping Your Clients Identify and Cope With the Impacts of Financial Stress

Thursday, October 17, 2019 from 2-3pm ET

consumerfinance.gov/adult-financial-education
Money Topic Resource Portals – Credit Reports and Scores

Credit reports and scores

Your credit reports and scores have a major impact on your financial opportunities. Our resources can help you better understand your credit reports and scores, learn how to correct inaccuracies, and improve your credit record over time.

About us

We’re the Consumer Financial Protection Bureau (CFPB), a U.S. government agency that makes sure banks, lenders, and other financial companies treat you fairly.

consumerfinance.gov/consumer-tools/credit-reports-and-scores/
The suite of *Your Money, Your Goals* resources

- **Your Money, Your Goals toolkit**
  - The toolkit (English, Spanish, and Mandarin)
  - The training (English and Spanish)
  - Implementation guide
  - Resource and referral guide
  - Sample survey instruments

- Companion guides for special populations
  - Focus on Native Communities
  - Focus on People with Disabilities
  - Focus on Reentry

Access electronic materials and order printed copies online: [http://www.consumerfinance.gov/your-money-your-goals](http://www.consumerfinance.gov/your-money-your-goals)
The suite of *Your Money, Your Goals* resources

- **Booklets**
  - Behind on bills?
    - Available in English and Spanish
  - Debt getting in your way?
  - Want credit to work for you?

Access electronic materials and order printed copies online: [http://www.consumerfinance.gov/your-money-your-goals](http://www.consumerfinance.gov/your-money-your-goals)
Organization of the toolkit

- Introduction
- Module 1: Setting Goals
- Module 2: Saving
- Module 3: Tracking Income and Benefits
- Module 4: Paying Bills
- Module 5: Getting through the Month
- Module 6: Dealing with Debt
- Module 7: Understanding Credit Reports and Scores
- Module 8: Choosing Financial Products and Services
- Module 9: Protecting your Money
Financial Education

Publications
Publications

- The Bureau has free financial education materials in English and many other languages
- Available for bulk ordering

http://promotions.usa.gov/cfpbpubs.html
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