Diverse Company Cultures Lead to New Virtual Approaches in Facilitation

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Webinar

- 2020 challenges & goals
- Three client cases
  - different workshop types
  - different client cultures
  - challenges, strategies, and outcomes
- Other virtual facilitation tips
- Q&A

- How to learn more

Challenges and Goals

The 2020 Challenges

- Transition from in-person to online
  - 2020 presented new challenges for everyone
  - Create new strategies
- Meet the needs of clients
  - Differing client cultures
  - Varying challenges
  - Stress to existing programs
- Adapt while maintaining quality and a consistent product/service

The Goals

- Keep our clients moving forward despite 2020
  - Maintenance efforts
  - Product quality
  - SME engagement
- Develop tailored facilitation approaches that align to organizational cultures
- People over Process

CASE 1 – the “traditional” client

Case 1 – Culture Characteristics

- Established and experienced client with few exams maintained yearly
- Small returning committee with highly experienced SMEs
  - Take pride in their work
  - Committed to the organization

Case 1 – Client Challenges

- Client concerned about quality and SME productivity
- Few SMEs are comfortable with tech/virtual environments
- SMEs depend on each other to write items together
- New committee members joining

Case 1 – Strategies

Before Workshop

- Planned with client
- Held Kick-off meeting to relieve worries, answer questions, and welcome new committee members
- Invited veteran members to describe experiences in test development and benefits of working on committee

During Workshop

- Paired veteran and new SMEs together to draft and/or revise items
- Switched on and off between item writing and review during workshop
- Celebrated small wins to maintain engagement

Outcomes/Alpine's takeaways

- No drop in productivity (slight increase)
- Veteran SMEs transferred knowledge gained
- New SMEs were supported and felt accomplished
- Client was relieved with no interruption in continuity

CASE 2 – the “unpredictable” client

Case 2 – Culture Characteristics

- Rapidly growing organization
- Value efficiency
- Wide interest to participate

Case 2 – Challenges

- Number of SMEs invited far exceeds recommendations/needs (virtual)
- Client not fully aware of challenges created when volume of participants increases
- SMEs have differing agendas for involvement

Case 2 – Strategies: Virtual Job Task Analysis (JTA)

- Strategically split SMEs in two groups
- Drafted initial documents with Group A
- Reviewed/revised initial documents with Group B and start additional documents
- Reviewed/revised additional documents with Group A
- Prompts to reduce duplication of work

Case 2 – Strategies: Virtual JTA

- Option 1 (standard):
  - Joint, complete weighting activity for final consensus
- Option 2 (modified):
  - Joint weighting activity training and weight submission, break:
    - Group A debrief and makes final weight decisions
    - Group B debrief and makes final weight decisions
  - Two weight recommendations made to stakeholder for final decision

Outcomes/Alpine's takeaways

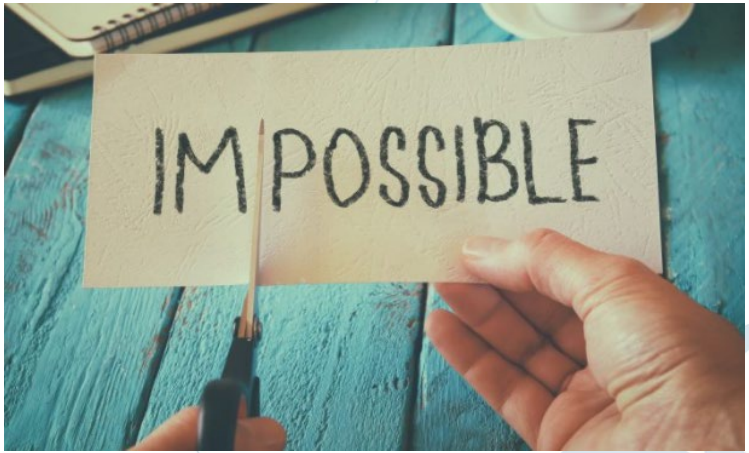
- Completed on time
- Employed equal SME representation
- Accommodated varying schedules and time zones

- Duplicated some work as Group A would review B's work, make changes, and vice versa

CASE 3 – the “tried and true” client

Case 3 – Culture Characteristics

- Strong commitment
- Positive
- Established trust
- Highly flexible (stakeholder and SMEs)



Case 3 – Challenges

- Balancing SME work schedules with project needs
  - International time zones
  - Multi-lingual
- Products and platforms used across different industries
- New stakeholder needing guidance

Case 3 – Strategies: Asynchronous Item Development Workshop (IDW)

Case 1 IDW – collaborative and live // **Case 3 IDW** – offline (asynchronous)

- Provided small assignments with clear deadlines
- Held check-in calls at varying times for writing support
  - Used as teaching moments, calibration
  - Provided specific feedback
  - Suggestions, samples, asked clarifying questions
- Provided other support
  - Email, online collaborative tools, etc

Outcomes/Alpine's Takeaways

- Completed on time
- Accommodated varying schedules and time zones
- Product quality did not suffer

VIRTUAL IDW CONTINUUM OF OFFERINGS

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Option 1: Client DIY/TD Advises

Option 2: Independent Submissions and Reviews

Option 3: Independent SME Writing/Group Reviews

Option 4: "Partially-engaged" Writing/ Group Reviews

Option 5: "Self-contained" Daily IDWs

Option 6: "Self-contained" Daily IDWs

- Less fidelity to in-person IDW
- Less synchronous SME engagement
- More flexible timeline

- More fidelity to in-person IDW
- More synchronous SME engagement
- More abbreviated timeline

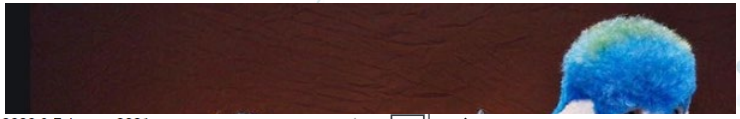
OTHER VIRTUAL STRATEGIES

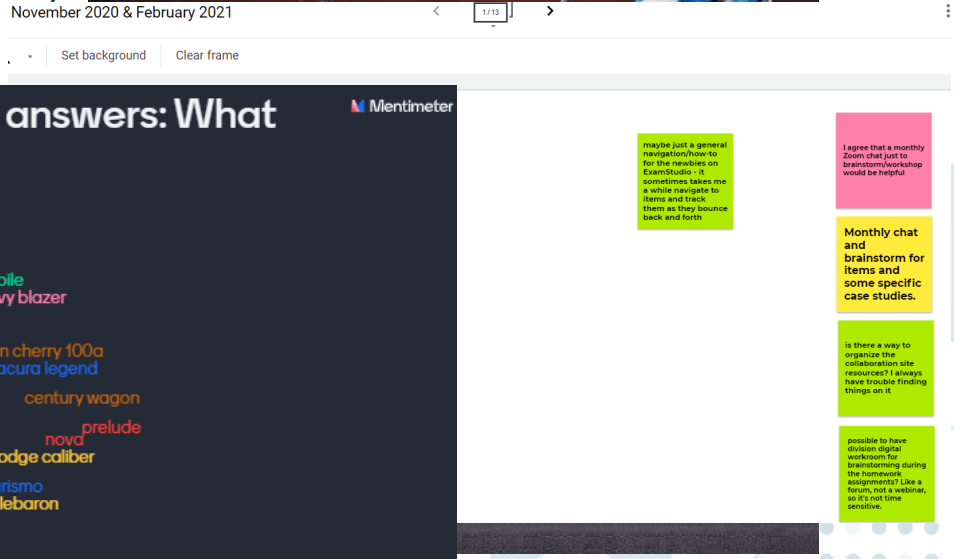
Tips to Transition from In-person to Virtual

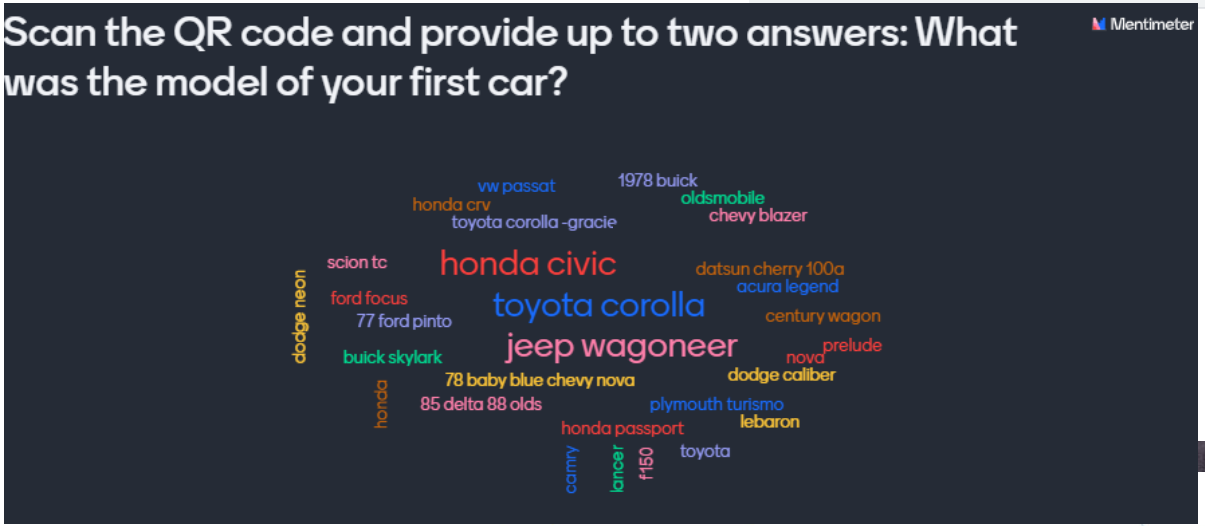
- Practice flexibility
- Ask instead of assume – clients have varying levels of preparedness
- Frontload information for client to set expectations
- Adapt tools/introduce new tools for virtual environments

Facilitation Tools for Engagement

- Community – how do we continue to build it and engage SMEs?
  - Unique image (conversation starter)
  - Google Jam Board (collaborative workspace)
  - Mentimeter.com (real-time ice breakers)







Ask us your questions…

Thank you for attending!

Connect with us – info@alpinetesting.com