
LEADING IN A VIRTUAL REALITY



The COVID-19 pandemic has stretched the health system in many ways, not the least of which includes shifting the settings in which work gets done. While frontline caregivers may be working in unfamiliar locations, many administrative leaders and others find their new working environment already all too familiar — as often it's their home. Work constrained by physical distancing has forced many of us to turn to videoconferencing technologies. During this uncertain time, we are being pushed to exercise flexibility in countless ways — convening online is just one. We see key questions emerging in this new reality:

- How can we ensure that conversations can be truly generative and productive?
 - How can we build on progress made before the pandemic, instead of losing momentum?
 - How can we recognize and acknowledge the benefits unique to the virtual environment?
- How can we leverage and strengthen our new skills in flexible adaptation over time?

There is always a risk that technology and tools (the form) overtake the content of a meeting (the function), and now that risk is amplified (Gilmore and Bing 2006). In many organizations, key initiatives like strategic planning have continued, and teams have pivoted to design and support these efforts in the new virtual reality. The task is to both ensure technology does not distract from the substantive issues and objectives at hand and also look for ways the new format might even enhance the work.

Recent work with a client to set a flexible, strategic direction for their future required shifting a pre-planned, in-person retreat to a virtual format, acknowledging that the pandemic could not slow the pace of the needed conversations. It was natural to think about what could be lost by not meeting in person, but we experienced important benefits through the online format.

The virtual retreat focused on scenario planning — imagining the future together as a canvas for the strategic choices the organization would make to shape its future. This exciting work requires intent and focus. Regardless of the retreat format, we remained true to the principles of good design and facilitation. We have learned there is a premium (and frankly a limit) to time spent together online, making advance preparation and post-meeting work even more important. Whether meeting in person or virtually, we provide participants with pre-reading and questions in advance to tap into creativity, build connection across team members, and help to synthesize something new in the retreat itself. We pay attention to the transition from the retreat to “afterwards” with effective follow-through (Gilmore and Bing 2006).

As always, there is power in utilizing different group configurations to catalyze the results you hope to see (Gilmore and Bing 2006). Creating groups that represent microcosms of the organization can generate out-of-the-box ideas for scenarios and increase empathy across participants. Virtual breakout rooms enable this experience and are an excellent tool for changing the landscape to invigorate the conversation.

This virtual reality necessitates greater than usual attentiveness to transitions into and out of the meeting, and to participants' mental states. Fragmented mindshare can impact participants' ability to connect and engage with the meeting's purpose. Being attentive to the ways people enter the virtual gathering can help the group start from a state of focus and mutuality, rather than distraction and separateness. With this in mind, we abbreviated the length of the retreat and divided it into two halves with a lengthy “away-from-the-screen” break. Multiple check-ins throughout the day might seem excessive, but can be critical to ensuring accomplishment of the objectives (CFAR 2006). The post-lunchtime pivot we made reenergized the group in the afternoon.

We made good use of several benefits of virtual gatherings as well:

- Facilitator capabilities — With so many participants' faces in view as “Hollywood Squares,” the facilitator can potentially see what’s happening with each person at the same time, unlike in person. We began this retreat by noting we would reserve the right to “call” on people. While we rarely do this in person, in the virtual format, it can be useful to invite those hanging back into the conversation, or to moderate when people may be jumping in at the same time (CFAR 2006).
- Leveling the playing field — We have seen that entering a virtual conversation can sometimes be easier than entering an in-person conversation, even considering time and technology delays, and silences and interruptions. There is no one at the “head” of the table, no problem with sightlines. People who are loathe to interrupt others can signal to each other with “hand raising” features that they would like to contribute next.
- Multi-modal communication — We have also seen that, thanks to the chat function, communication can be more fluid in virtual settings. Without interrupting the flow of the primary conversation (voice), participants can share relevant links or ask for clarification via the secondary conversation (chat). Private chat functions are also an avenue to raise questions or take up issues with the facilitator without pausing the flow or creating tension within the meeting. While using chat technologies can be concerning or distracting to some, we are finding them increasingly beneficial and additive.

Through this virtual reality, we have observed one more unexpected benefit: virtual meetings allow colleagues to see one another in new ways. Amanda Hess, critic-at-large for *The New York Times* calls the current phenomenon one of “mutual experience” that “has revealed connections between people that may never have been revealed otherwise” (Rocca 2020). We imagine that when people come back together in person, they will possess a different sense of collegiality given this sharing.

The pivot to leading virtual meetings and retreats requires intentionality, humility, and continuous learning. We are all in this together, and it can be challenging. However, the potential benefits are manifold, and we hope and predict that some will continue as our working worlds continue to bend and flex in unanticipated ways, changed by this era.

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