



# OPENING SPACE FOR VIRTUAL GLOBAL COLLABORATION

BY LUCY GARRICK

**O**n Saturday, May 9, 2009, approximately 50 people from around the world logged into a Skype Chat for the opening session of a virtual conference titled “Real-time Virtual Collaboration.” Using principles from the Open Space methodology, the four-hour online event convened participants around the basic question: “What tools and principles do we need to help change unfold in our organizations and world?” The idea behind the event was to learn what is possible when integrating the elegance of a facilitative convening method such as Open Space with online synchronous communication tools such as voice over internet protocol (VOIP), wikis, chats, collaborative work tools, and other social media.

## A Self-Organizing Event

The virtual conference was the brainchild of Holger Nauheimer, creator of the Change Management Toolbook. It was the simplest of acts; Holger put out an invitation to his contact list, and RTVC was born. The conference was the collaborative design of a self-organizing group of independent consultants, facilitators, and technologists who met online; most still have not yet met face-to-face. In addition to Holger, who is from Germany, the RTVC

steering team consisted of Stephan Dohrn, (Belo Horizonte, Brazil), Lucy Garrick (Seattle, US), Hans Gaertner (Bremen, Germany), Suresh Fernando (Vancouver, Canada), and Sofia Bustamante, (London, UK).

The hosts created an online portal where participants organized before, during, and after the event (see “Online Portal”). Links led people to conference registration, pre-session preparations, places to post session topics, and technical help. Because this gathering was an experiment, conference registration was free.

We used principles from Open Space Technology because of its simplicity and flexibility. Ironically, Open Space Technology, as originally conceived, has nothing to do with computer technology, but is a convening methodology consisting of a space to meet, a group with a shared theme or topic around which conversations can be focused, and time to achieve a desired result. Before our conference began, participants posted sessions related to our conference

theme on an online discussion board. Time was scheduled for two tracks of self-organizing breakout sessions, where interested parties would participate using a variety of social media.

Imagine, if you will, a sort of virtual conference hotel where Skype Chat is the lobby and general convening space. Participants from around the globe arrive and sign into the opening session on Skype Chat. Other virtual rooms are designated as self-service places to get information on how the conference is organized, how to convene an Open Space session, technical support, and so on. Two tracks of breakout sessions are posted and convened in other virtual spaces using free social media such as virtual white boards, writing spaces, and mind maps as well as online video, audio, and text chat. In a closing session back in the general convening space, participants post outcomes from each breakout session.

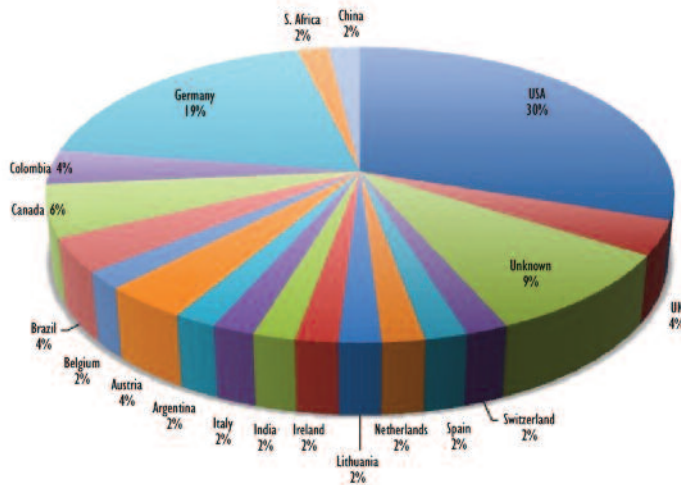
On the day of the event, we had no idea what would happen. About 30 minutes before the posted start time, 53

## TEAM TIP

The virtual world is here to stay, but you don't have to jump in all at once. You can start to get your feet wet by using a free online tool for scheduling meetings with people at remote locations, such as [www.doodle.com](http://www.doodle.com) or [www.meetingwizard.org](http://www.meetingwizard.org).

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## PARTICIPANTS FROM 19 COUNTRIES



People from 19 different countries participated in the virtual conference.

participants representing 19 different countries began to “arrive” and greet each other with no assistance from the facilitators (see “Participants from 19 Countries”). After the opening session, conveners held nine breakout sessions using a variety of social media platforms.

To be candid, I expected chaos. After all, in chat rooms, everyone can post simultaneously. Each social media tool has its own idiosyncrasies. To my surprise, the event was at least as orderly as any physical gathering I have attended, maybe more so. During the closing session, I asked participants for one-word reactions to the conference. Their reactions ranged from “thrilling, encouraging, and engaging” to “like riding a roller coaster, technically challenging, and disruptive.”

Our team was delighted by the responses and the success of the collective experience of conference attendees. We believe that virtual collaboration holds tremendous promise for co-designing solutions to some of society’s most challenging issues, and because social media is a co-dependent environment, its strategic potential will continue to unfold as more and more people learn how to convene and co-create in it.

### Lessons Learned

We realized somewhere along the way that we had been virtually collaborating

in order to design our virtual collaboration conference. Since the conclusion of the RTVC conference, our team continues to work together on new projects. We still have not met in person. We get together daily in a private Skype Chat that we call our “office” to plan projects and discuss business matters. We recently facilitated an online brainstorm with people from around the world on the topic of participative government. We are openly sharing our expertise, learning from new experiences, and developing strategies to help individuals and groups who might otherwise have no way of working together.

Here are some of the things we’ve learned from convening the conference and other experiences with social media:

### Ten Tips for Virtual Collaboration

**1. Make It Cost Effective:** You can do a lot with free and low-cost online tools. You can run global real-time meetings and automatically record the contents effectively and efficiently. Our first public conference was designed and implemented in four weeks with six volunteers and two part-time contractors at various levels of technical skill. You could not put on a physical conference in that timeframe for that budget. Our second event was a much more elaborate design and took approximately the same amount of time to plan.

**2. Wade Before You Dive In:** There is a dizzying array of social media. Pick a couple of platforms and experiment, ask questions, and get comfortable. This can be a time-consuming effort, so be patient.

**3. Google It:** Take advantage of free advice published on blogs and websites about how to use social media.

**4. Prepare by Writing:** If you’re a convener, consider pre-writing some text ahead of time in a simple text editor. Having prepared material that you can easily cut and paste into a chat or discussion can allow you to focus on the conversation instead of on the tool.

### 5. Hold a Technology Orientation:

Allow time in advance of a meeting or conference as well as at the beginning of breakout sessions to familiarize participants with the tools being used. Test them ahead of time. This is particularly important when running multiple sessions utilizing different social media platforms.

### 6. Learn to Run Multiple Channels:

Collaborating in small groups in virtual space involves running parallel channels simultaneously. Some, such as text chat, are synchronous (real-time), and others, such as wikis, are asynchronous. Some, such as most blogs, are one-way, and others, such as VOIP, are two-way. Experiment and have fun with these different media.

### 7. Hone Your Facilitation and Virtual Skills:

The culture that has evolved from virtual collaboration features openly sharing expertise with a generosity of spirit. People share and help each other. As in the physical world, skillful facilitation supports communication, makes meaning, and creates the conditions for people to take conversations beyond talk to achieve goals. Your prowess in virtual-land will be aided by unlearning old beliefs about protection and control, and learning new ways to contribute and share the work. It is a practice—something you will never completely master but will improve with experience and curiosity.

### 8. Share Your Systems Thinking Skills:

The virtual world is nothing if not self-organizing and emergent. Those

lessons we've learned about being aware and present and testing assumptions are essential for successful leadership and engagement in the culture of virtual collaboration.

### 9. Designate Communication

**Conventions:** Designating a few simple communication conventions can be enormously helpful when communicating via text. We use "ALL CAPS" to get the attention of the group; we use "@name" to address a comment to a specific person; and we use "#" at the end of a sentence as a virtual talking stick to indicate we're through speaking. Abbreviations and incomplete sentences are common and part of the online chat culture.

### 10. Document and Keep the Conversation Alive:

One advantage of all social media is that most of it automatically records the content of a meeting, whether text, voice, or image. To keep a synchronous conversation alive, we synthesize key themes and next steps, then cut and paste them into a community discussion board, blog, microblog, or community website.

### Different and the Same

Virtual convening is part of virtual collaboration, but holding a meeting with geographically distant participants is just the tip of the iceberg. Conveners and participants have varying perceptions about what it means to collaborate. Our model of virtual collaboration continues to evolve in the virtual world, and so will yours. We change the virtual tools as they change us. Collaboration implies that real value is created for both conveners and participants.

In the virtual space, value is rarely limited to finances. It includes things like openness, generosity, respect, and reputation. Creating real value with virtual collaboration, as with in-person collaboration, is greatly enhanced through a thoughtful design and skilled facilitation process linked to the purpose of your gathering.

What is surprising is that an amazing amount of real material value is not only possible but has already been generated from virtual collaboration without the benefit of the traditional organizational systems and structures. By this I mean things like no org chart, no department heads, and no decision trees. These are emergent qualities in the virtual world.

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Consider what has already happened with Wikipedia and the Mozilla browser, Firefox. Wikipedia is a high-quality global encyclopedia published in 10 languages and three alphabets that was created by volunteers with a passion for its subject matter. For more than 10 years, Mozilla has been an open source, non-profit community creating and innovating on key Internet technologies where large commercial vendors could not. Mozilla has become the software provider of choice for more than 170 million people, creating products such as the Firefox browser and the Apache web server. Something revolutionary is going on in terms of what open social media can accomplish, and I have no doubt that in ways both subtle and obvious, it is likely to transform our institutions and organizations around the world.

In the closing epilogue of his book, *Here Comes Everybody* (Penguin Press, 2008), Clay Shirky tells the story of Aldus Manutius, a Venetian printer who in 1501 published the first translation of Virgil's works in a format small enough to fit into a gentleman's saddle bags, thus making the written word portable. Shirky, who studies the

impact of media on society, goes on to say, "The lesson from Manutius's life is that the future belongs to those who take the present for granted . . . The mistakes that novices make comes from lack of experience. They overestimate mere fads, seeing revolution everywhere, and they make this kind of mistake a thousand times before they learn better. But in times of revolution, the experienced among us make the opposite mistake. When a real once-in-a-lifetime change comes along, we are at risk of regarding it as a fad."

Virtual collaboration is here to stay. It provides a bridge that goes well beyond geography. It is a way to connect what we have in common across space, time, generations, and organizations of every type and style. Virtual collaboration calls upon those of us who are learners to unlearn things because they have stopped being true and to tap into collective sources of wisdom facilitated by breaking through arbitrary institutional boundaries. ■

**Lucy Garrick** is a founder of NorthShore Group, a Seattle-based consulting and coaching practice in leadership and organizational change, and a co-founder of Radical Inclusion, which provides international education, social media strategy, and consulting services in the use of social media for positive organizational and social change.

### For Further Reference:

Slide Show of Lessons and Outcomes from Real-time Virtual Collaboration

Radical Inclusion Blog

50 Social Sites That Every Business Needs from Focus.com

Skype: How To Make Free Calls Anywhere

How To Participate in a Twitter Chat from TwitTip.com