



## 11 tips for online meetings according to the principles of Sociocracy 3.0

Suddenly we work from home. We no longer meet live but online, via platforms such as Zoom or Skype. Even events and meetups are organized digitally, new ways of digital gathering are invented every day. Have you also had the experience of remote birthday parties and online circle meetings?

Working from home in itself brings enough practical, technical and psychological challenges. But how do you ensure that online meetings with your colleagues or peers are effective, that you make the right decisions in a team online, check ideas and share knowledge without ending up in chaos or hearing only the loudest voices? And above all, let's not let go of our progressive ambitions around the new way of working, shared leadership and self-management and build them into our online meeting culture.

As a sociocracy coach, I have gained a lot of experience in recent years in facilitating online meetings according to the principles of Sociocracy 3.0 (S3). Because there is suddenly so much online collaboration and it is still new material for so many organizations, I would like to share this knowledge with you. Here are 11 Sociocracy 3.0 tips that provide more impact, satisfaction, connection and results in your online meetings.

### 1. Make sure you are well prepared

Build the agenda in advance and in consultation. It often helps to give someone this role. This person explores who has agenda topics and what preparation is requested from the participants. Drivers, proposals, domain descriptions and strategies can be delivered and read in advance, which saves valuable time that you can use to hear everyone's perspective on the matter. A duration is given for each agenda item and it is agreed upon who will bring the item. Link a goal to each agenda item: What do you want to achieve in this meeting, what next step, action or decision do you want to take? Make the agenda visible during the meeting, including the adjustments along the way.

## 2. Agree on a clear division of roles

I recommend that you work with the following roles. These roles can, especially in small teams, be combined and alternated, possibly after a certain period. There is also a nice S3 process for this: role selection. Despite the fact that some naturally take on a certain role more easily, it is advisable to change roles in function of equivalence. It helps to explicitly ask if there are any objections to take up a role, so that everyone knows she/he has the mandate.

### These roles can be distinguished on forehand:

- **Host** : ensures that practical matters are taken care of: a digital agenda invitation, a link to the online meeting and organizing or providing the necessary IT support.
- **Agenda builder** : makes the inventory, builds and shares the agenda in advance and ensures that the required preparation is done, both by the "owners" of the agenda items and the participants.

### The roles during the meeting:

- **Facilitator** : leads the meeting, i.e. guiding the process, the form, not the content. Does reformulate or summarize what is said without additions. He/she ensures that the chosen process is followed, that everyone has a say and that each process ends with an appointment or next step. If it's a dual role and the facilitator is participating at the same time, then make it explicit by naming it, show a gesture or change position.
- **Timekeeper** : makes us aware of the time, gives a signal when the proposed time has passed, after which the facilitator can make a new appointment with the participants.
- **Visualist** : ensures that the screen is shared so that everyone sees the same thing and can follow the process. Can also support post-it sessions or create live visuals.
- **Secretary** : ensures that the necessary reporting is done, this can be followed live by e.g. working with a Google document. Often it is sufficient to just write down the appointments and to-do's and visualize what ends up in the 'parking': things that will be discussed outside the meeting, in one-on-one conversations or in other company and what is right now is not a priority. Sometimes a chord at word level and exact wording is important, it is nice if this is visible then.



### 3. Start with a check in

You can consider checking in as a temperature measurement. It ensures that attendees can express matters that were top of mind before they entered the meeting or that occupy them around this meeting. In this way everyone can "arrive" and tune into the agenda and goals of this meeting.

The facilitator invites everyone one by one to share what is alive in them. In online meetings this often happens briefly, e.g. in one to three words. It can be longer if it is necessary to ventilate something or if connection is an important goal. There are many types of check-in questions and variations on the question 'What is alive in you right now?' It is important that every voice is heard at the beginning of the meeting and that everyone can be fully present. The check-in takes place in a round, an important basic pattern in S3, in which those who do not speak listen actively and in principle do not interrupt or respond to the speaker.

Other things that may be important at the beginning of the meeting:

- **Notifications:** does anyone have anything to report?
- **Needs:** does anyone need anything else to participate fully in this meeting?
- **Game rules:** are there other game rules needed to ensure that this meeting can run smoothly?

Don't forget to check out again, at the end of the meeting, so everyone can share how it was for her/him and effectively leave the meeting behind.



#### 4. Use the principle of consent

The core thought behind this method is the idea that wisdom is spread among all participants, and by extension among all members of the organization. Nobody has a complete view on a problem or challenge, so it is important that we put together as many different perspectives as possible, in a constructive manner.

The principle of consent is to actively invite possible objections and concerns to a proposal. Concerns do not hold back proposals, while objections are constantly being investigated by listening to the underlying argument: why is it not good enough or not safe enough to try? A proposal may go against previous agreements or there may be undesirable consequences. The arguments are qualified by checking with the audience whether it is relevant before looking for solutions or adjustments. More about consent later.

Checking for consent can be used frequently, on the facilitator, the agenda, the driver and the proposed process. Therefore, before the meeting actually starts with those present, go through the agenda briefly and see if there are any objections to following this agenda. Perhaps there are last minute urges that need to be discussed or topics are no longer relevant. Also check the order and the timings.



## 5. Take the facilitator role seriously

Whether it is done online or live, as a facilitator you have a lot of impact on the group. You monitor the equivalence, you separate the process from the content, you ensure that the agreed process is followed and that everyone is involved and understands the steps. You also ensure that everyone feels safe and invited to express themselves, to raise concerns or concerns and you engage in non-violent communication where necessary: you guide the group to the needs level and point out that everyone has similar needs, but uses different strategies. Doing all this is called 'holding the space'.

Facilitating online is of course even more difficult than live. First of all, you write down the names of everyone, so that you can note who has been speaking at each round. You address everyone personally. Even if you don't see everyone on your screen at the same time, addressing every participant creates equivalence. Be clear in your questions, always ask one question at a time and kindly point out if participants do not follow the process or take up speaking time of others.

Make a new appointment with participants if there is a deviation from the process or if the timing is exceeded. Awareness of time helps everyone. But perhaps there is something more important to discuss and is it wiser to slow down than to follow the proposed schedule. Ask: How much extra time do we want to take for this and instead of which agenda item? It helps to propose a time, which can then be improved (the principle of consent). If no extra time is required, what is the minimum next step that we want to agree on together?

For longer online meetings, a five-minute break in between or a fun exercise is also very healthy, because sometimes we happen to forget our basic needs and our body in these digital times. Regularly alternating the facilitator role helps to increase understanding and respect for this role and distributes leadership. You can even switch within the meeting, as long as it is clear who is facilitating. Help each other in this role and provide feedback, preferably at the request of the role keeper.



## 6. Do equivalent rounds

Doing rounds is a great way to listen to the different perspectives. By taking turns and hearing everyone's views on a subject, you will notice that everyone is building on each other and that the solution often presents itself. It's a magical and a welcome solution if you get stuck on a theme or if the complexity of a decision requires to slow down.

As a facilitator, make sure that you do not always make the same round, alternate who starts and give clear guidelines that you can remind the participants of during the round. For example: Can you formulate in a few sentences what this proposal does to you? Not everyone has the same length of speak, so ask participants to be aware of the time you want to take for this step in total. As an aid you can visualize the time or make a sound when the individual speaking time has passed. Of course, this can all be more informal and you can play with it, depending on what is needed at the time.



## 7. Use smart ways to exchange

An easy way to exchange information is to answer these three questions:

- What have I done in the past period (day / week / ...)?
- What will I do in the coming period?
- What else do I need? What do I encounter?

The last question reveals blockades and dependencies, for which someone needs others. The blockade is appointed and a solution is organized, for example by agreeing a consultation between the parties involved, on a later moment. It is not dissolved in depth straight away.

This is a technique that is often used at short stand-up meetings, but it can also be used remotely. You can agree that each team member will provide this information before a certain time each day or you can regularly schedule a short online meeting, with one-to-one conversations afterwards in the same call or in online breakouts.

I also use this format for governance meetings and delegate circles, where delegates from different domains provide a brief overview of their work. In this way you stay informed of what the other (team) is doing, and you guarantee the flow of information in the organization. In addition to organizing the flow of influence, this is an important matter in Sociocracy 3.0.



## 8. Be aware of artful participation, digital etiquette and online meeting hygiene

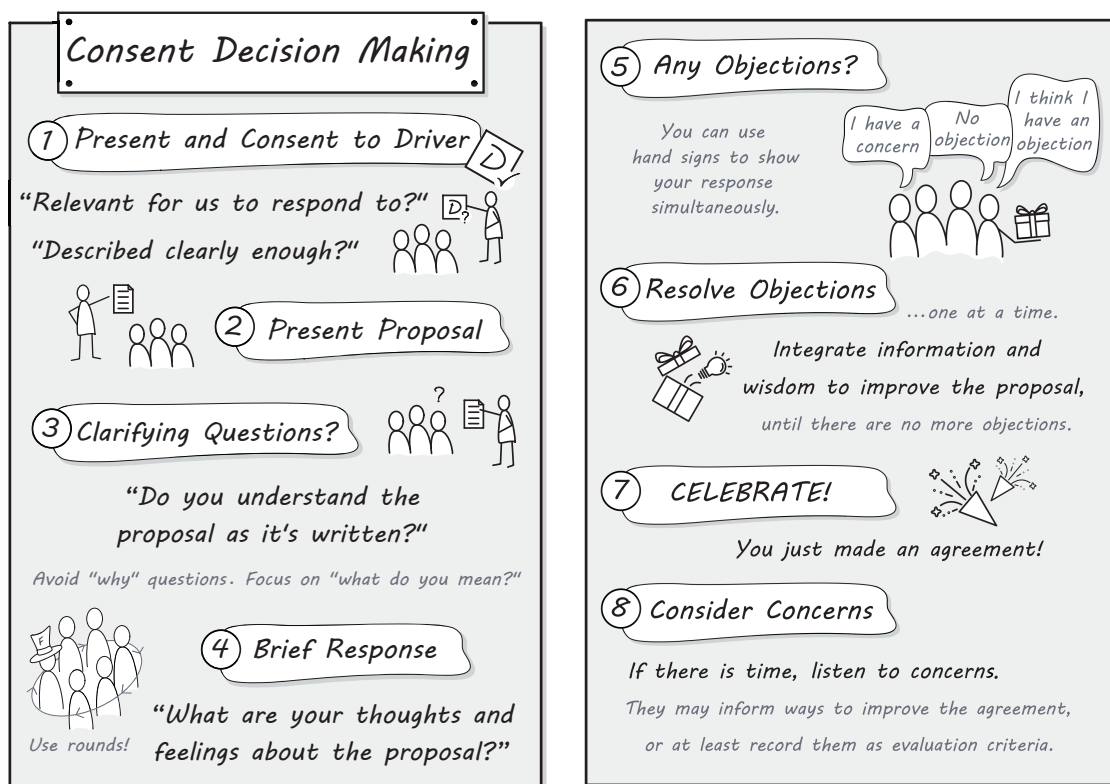
Artful participation is a S3 pattern that invites self-reflection and allows you to find out what your best contribution is to the collaboration, to the meeting, etc. What is artful in digital times? At online meetings you can already think of these things:

Before the meeting starts, make sure you have your technique and technology in order. By downloading the right program, testing the link, checking your audio and your video. By doing this in advance you can respect each other's time and start on time. Make sure your face is visible and that you look neat, this is a form of digital etiquette and it also creates connection.

## Other basic rules:

- Mute yourself when you are not speaking to avoid unnecessary background noise.
- Follow the facilitator's instructions.
- Do not interrupt others unless it is an added value to the conversation.

At first you may forget to "unmute" yourself when asked to speak, but our digital skills are evolving rapidly. Being artful is a continuous process: is it best to interrupt, is my contribution a personal preference or can it be important for the group? Everyone has their own path and learning curve here, because artful participation means something different for each of us.



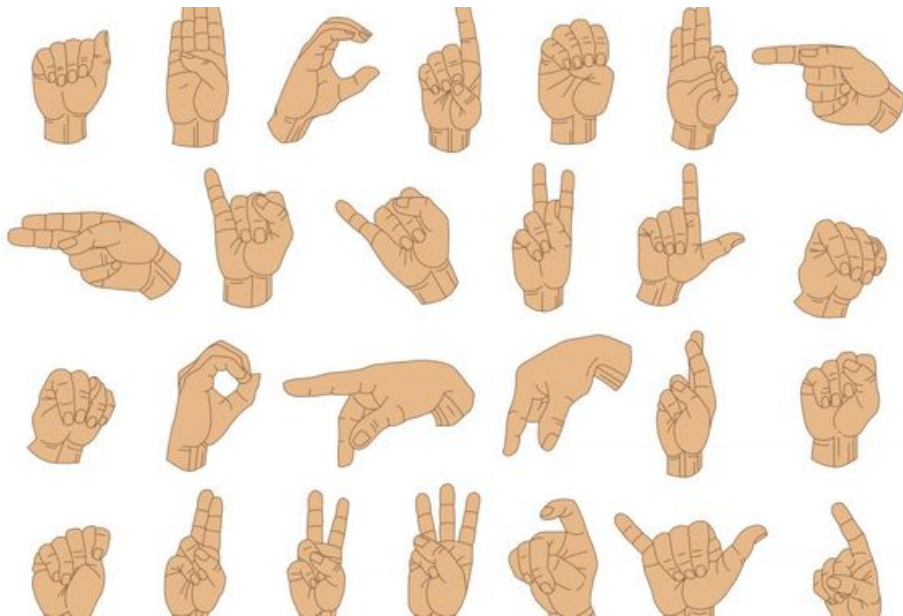
## 9. Use online consent decision making, rather than postpone decisions

The S3 pattern consent decision making is one of the most powerful methodologies in the range of Sociocracy 3.0 patterns. It can be used online just as well. The basic attitude is that we bring ideas as a proposal that still lacks wisdom and that can be further improved. Together we constructively collect arguments why it is not good enough yet, may be harmful, goes against previous agreements or has undesirable consequences. We qualify them and integrate them into the proposal if they are adopted. As a facilitator, you follow the pattern and explain what you ask the participants at every step. Here are a few tips:

- Use rounds and ask for concise answers.



- Start by looking for consent on the driver. Is this the problem or challenge that we want to address? Do we want to change anything about the wording? Is it clear to everyone?
- Let - preferably the creator - present the proposal. Invite the participants one by one to ask short, clarifying questions about the proposal. Ask to defer opinions, reflections, possible objections and concerns. Does everyone understand what it says?
- If the proposal is clear, let everyone give a short response to the proposal, again in a round. This ensures "venting" and discharge.
- Then you start looking for consent. Welcome any possible objections or concerns. Ask everyone to clearly show her/his hand in front of the screen, so that you as a facilitator know that everyone is ready to speak out. Then let everyone show their reaction at the same time via hand gestures (see below) after you have counted down, so that there is no influence. Take time to write down the responses so you don't miss an objection or concern.
- With objections: As a facilitator, you make a clear distinction between arguments and solutions. We are often so solution-oriented that we immediately put forward our personal strategy, but it is important to first find support for the reason why it is not good enough, and thus to qualify the objection well. Do we find this argument relevant, do we want to take this into account?
- After qualifying, ask the person who expressed the objection whether she/he already sees a solution, otherwise you can ask the group. Make sure everyone builds on each other and respects other perspectives (this is the "both and more" principle).
- Search for consent on the proposed changes and then zoom out again to the whole proposal, to discover whether there are any other objections and look for consent on those in the same way.
- If there are several possible objections, there are two routes. Either you listen to them all at first and determine which objection is the most fundamental and is best treated first. Either you start with one objection, which may also resolve other objections.
- Since concerns do not hold back the decision, listen to and/or note the concerns at the end of the process and use them in the evaluation. Share this golden rule: if you are unsure whether something is a concern or an objection, please present it as an objection. It is safe to do, because we will qualify it together. As a facilitator, always be inviting, any possible objection is welcome, is wisdom that should be seen.



## 10. Use online sign language

What can help a lot in online meetings is the use of sign language. This allows everyone to quickly display a response without taking over the microphone. In Sociocracy 3.0 we also do this live in different processes and situations. Here are some commonly used gestures:

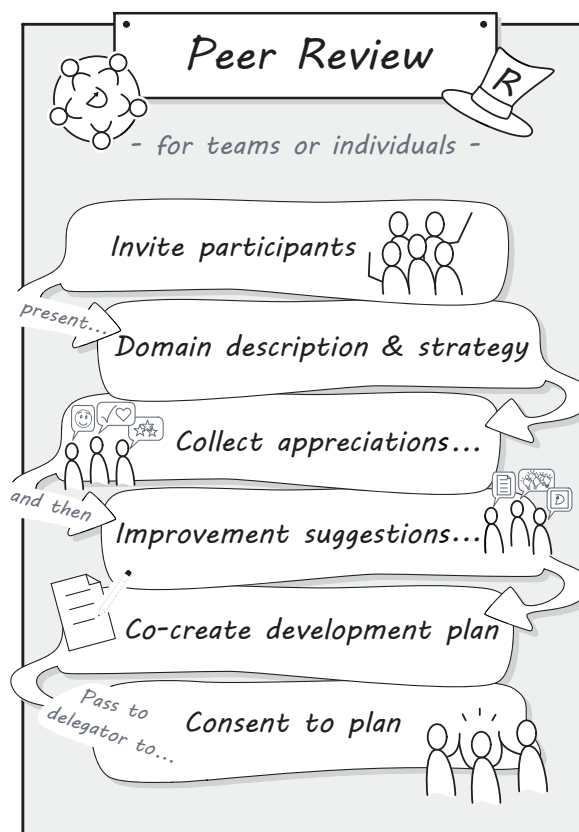
- Nodding with index finger: I also think bingo.
- Raised hand: I want to say something.
- Thumbs up: good enough for now, safe enough to try.
- Show fist: I am ready to respond to this proposal.
- Flat hand with palm open upwards: I have a possible objection.
- Palm down, shaking movement: I have a concern.
- Two hands up, rotating wrists: applause, celebrating a decision or breakthrough.
- Make triangle with hands on forehead: let's be artful.
- Triangle in front of your chest: I have wisdom to add.

I am sure that there are many variations on this and that many more gestures will be developed in the near future.

## 11. Evaluate every online meeting

If you want to get smarter together quickly and continuously improve your way of working, it is best to build in sufficient feedback loops. Therefore, allow some time at the end of each online meeting to evaluate the meeting. Here are two easy formats that can facilitate this:

- Start-stop-keep: Ask each participant in one or more rounds: What do you want us to start with in our meetings/way of working together? What do you want us to stop doing? What do you want to keep about our meetings/way of working together?
- Peer Review: Three rounds: A round of appreciations, a round of improvement suggestions and a round with concrete development actions and/or agreements.



Make sure that the evaluations and development plans are logged and shared so that you can look back on them. To grow in a certain role, like the facilitator, you can also apply the above or other evaluation methods and ask your fellow participants to evaluate you in this. It is important in S3 that you take ownership around your growth and start off yourself, in evaluations that concern you.

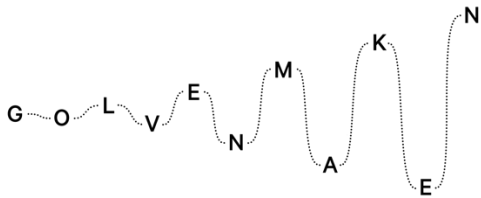
## And now it's up to you!

I wish you all good luck with these S3 online meeting tips and I would like to hear your tips & tricks aswell. If you have any questions about this, if you are interested in online guidance or you want to use an independent facilitator in your online meeting, you can reach me via the details below.

Soon I will organize an online zoom meeting to exchange, explain and exercise these online meeting practices. You can register for this by sending a message via my [website](#). There you can also read more about Sociocracy 3.0, facilitation and organization and team coaching.

Thank you very much for your attention.  
Take care of yourself and each other,

Dette van Zeeland, organization coach at Golven Maken, , [www.golvenmaken.be](http://www.golvenmaken.be)



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