

Virtual Facilitation & Coaching Best Practices Guide

This guide equips you, as a facilitator, with proven strategies for delivering high-impact virtual workshops and coaching sessions. Your role is not only to share knowledge but to create an engaging, interactive environment where participants feel connected, supported, and motivated to apply what they've learned.

NOTE: We have a PowerPoint slide on 'Zoom Best Practices' that you can add at the start of your presentation: <https://www.livingasaleader.com/Files/Marketing/Zoom-Best-Practices.jpg>

Key Principles of Virtual Facilitation

- Engagement First – Participation is the antidote to virtual fatigue. Build in regular interaction every 3–5 minutes.
- Clarity is Key – Be concise. Virtual attention spans are shorter, so simplify instructions and keep segments tight.
- Connection Over Content – People remember how you made them feel. Create trust before diving deep.
- Adaptability – Be ready to adjust pace, content, or tools based on participant energy and needs. Take short breaks more frequently.

Preparation Best Practices

- Technology Check – Test platform features (breakout rooms, polls, screen sharing) in advance.
- Backup Plan – Have an alternative way to connect (phone, backup slides) if tech fails.
- Environment – Ensure good lighting, neutral background, and clear audio.
Pre-Engagement – Send pre-work, session objectives, and login instructions beforehand.
- Session Structure – Plan for short bursts of teaching followed by discussion or activity.

During the Session

To Keep Energy & Attention High:

- Open with a warm welcome and personal check-in.
- Use names often and encourage cameras on (while respecting comfort levels).

- Alternate between presentation, discussion, polls, and breakout activities.
- Limit slide text – aim for visuals + talking points.
- Pause often for questions and reflection.

To Manage Challenges:

- Redirect off-topic conversations politely: “Let’s capture that in the chat for later.”
- Re-engage distracted participants by calling on them by name (in an inviting way).
- Manage time rigorously – virtual fatigue is real.

Virtual Coaching Tips

- Build rapport early – start with casual conversation.
- Use active listening cues (“What I hear you saying is...”) to demonstrate presence.
- Share documents and visuals live to make abstract ideas tangible.
- Co-create action steps – make them visible on-screen and confirm agreement.
- Schedule quick follow-ups (5–10 minutes) to maintain momentum.

Follow-Up & Accountability

- Send session notes or a resource summary within 24 hours.
- Provide a “next steps” checklist.
- Encourage peer accountability groups for workshops.
- For coaching, agree on specific actions and timelines, then track progress in the next session.

Troubleshooting Guide

Challenge | Quick Fix

- Audio echo or feedback | Ask participant to mute, check for multiple devices logged in
- Low engagement | Use a poll, call for reactions, shift to breakout rooms
- Tech difficulties | Move discussion to chat, share materials via email, reschedule if necessary
- Long-winded responses | Summarize and redirect: “Great point, let’s hear from others”

Virtual Etiquette Checklist

For Trainers:

- Log in 15 minutes early
- Have materials ready in shareable formats
- Keep camera on and maintain eye contact via the lens
- Speak clearly, vary tone, and smile often

For Participants (share in advance):

- Join from a quiet space
- Mute when not speaking
- Use camera when possible
- Be prepared to engage – polls, chat, discussions

Final Thought:

Virtual facilitation is as much about connection as it is about content. When you combine solid preparation with a focus on engagement, you create an experience that resonates and sticks.