TIPS FOR DOING A VIRTUAL LCP DEBRIEF OR COACHING SESSION:

by phone or virtual meeting platform; or face-to-face using electronic materials.

Keeping up with evolution!

As our ways of working evolve so must our ability to use new tools and technology to deliver an even better quality of service. The purpose of this guide is to explore how to leverage LC's digital tools for effective debriefing and coaching.

Purpose of the Debrief

The intended purpose of the debrief remains the same – to be in service of the Leader and for them to gain deeper insights into their own leadership and their perceived impact on others.

Mind shift

In LC's experience the statements below are accurate. Check your own reactions to them and consider them as part of the mind shift you may need to explore towards delivering great outcomes, virtually:

- Debriefing an assessment or conducting a coaching/consulting session virtually can be as productive and successful (or more so) as face-to-face.
- Virtual sessions allow you to build trust and "go deep" faster than you might imagine.
- Visual/non-verbal cues to your client's mental and emotional state of being and reactions throughout the session can usually be more easily observed. (That goes for you too, so be authentic yet mindful that any fleeting reaction of your own may also come across more clearly.)
- It helps to think visually when preparing and delivering a virtual debrief and interact as if you are in the same room – practice ways to share information and materials, use Chats for quick comments, use platforms like Miro or Mural for visual presentations and representations of what you are discussing or planning and that can be easily shared with your client later.

Benefits of working with digital technology:

- Both you and your client can see the same document, graph, or other materials on each of your screens in whatever size each of you prefers for easy viewing.
- It's easier to move between documents, pages, or images digitally, instead of sifting through printed pages trying to find the right one to hand to your client across a table.
- You can work more effectively with larger groups and with individuals in different locations at the same time – providing equal access, equal opportunity to learn and participate.
- Scheduling becomes easier without the constraints of location and travel time.
- Time is used more effectively – no time lost traveling to a physical location; time zone differences can more easily be minimized.
- Sessions can be recorded for review and ongoing learning.

Preparation is Key - You need to be well prepared when coaching in the virtual environment.

Preparation – Technical

Learn all about your virtual meeting platform:

- Use a more commonly known platform like Zoom or Microsoft Teams that is more likely to be familiar to your client as well as yourself; learn how to use the platform features well.

Set yourself up for success electronically:

- Use a desktop or laptop (preferably) or another electronic device that allows you to connect at least one larger monitor, preferably two
- Ensure your camera and microphone are working
- Have a document or note-taking app open during the session for taking notes digitally
- Have your mobile phone at hand for troubleshooting

Know how to create your virtual meeting and share access details:

- Determining date, time, length:
    - Consider time zone differences for the start and end time, also the actual day/date as well.
    - Use a program or app like Time Zone Converter: https://www.timeanddate.com/worldclock/converter.html

- Share session details with your client:
    - Calendar invitations are usually the most efficient and foolproof way to share session details - include date, start/end time, session access details, your mobile number

- Share important instructions with your client before the session:
    - Refer to "Communication with the Leader prior to the Debrief" below about sharing detailed instructions in advance of the session.

Preparation – Your Environment

Your location:

- Set yourself up in a private quiet space, comfortable chair, desk.
- Feel comfortable in your environment. This will help the Leader also feel relaxed.

Be aware of the background that is visible on the screen and modify as needed:

- Have a visually calming background, uncluttered; consider using a physical screen behind you.
- Your platform may allow you to "Choose a virtual background" – however you must ensure it does not shimmer as you move, or it will be too distracting.
- Check out your platform Setup Preferences and adjust to suit – "Touch up my appearance" is a good one.
- Ensure that you have a good strong lighting source on your face such as a desk light - natural light can be unreliable and put your face into darkness.

Minimise distractions:

- Ensure you will not be interrupted.
- No background noise, phone turned to silent, computer alerts are off.
- Depending on the platform, if you share your entire computer screen rather than just the document that you want to share then turn Off Notifications to prevent pop ups from being seen. Present a clean desktop with everything shut down that is not needed.

Preparation – Your setup; Practice for ease of delivery

As you start the session:

- Set up your computer and monitors. It's easier to conduct the debrief if you have 2 screens – one for the documents and one to see the Leader.
- Remember to have a note taking app open during the session.
- Open the LCP graph and reports and other materials you need ready for the session.
- Have your mobile phone at hand.

Decide to keep your camera/video on or off?

- Ideally you want to keep both your video and the client's video on so that you feel like you are sitting in the same room and able to see each other as you would F2F.

- Internet instability may force you to turn your video off …
  - If your Internet is unstable, turning video off does improve stability so video may not be an option for you or your client.
  - There are advantages to just focusing on the voice – tonality, expression, what is said and not said, staying focused on the voice.
  - There are advantages in seeing the person as well, picking up body language and other visual cues and enabling us to maintain the close personal connection.
- Video Tips
  - Maintain 'virtual eye' contact, especially when you are speaking, by looking into the camera on your computer, rather than looking at the image of their face (which is our natural tendency).
  - Let them know if you will be taking notes, and as such looking away.

Practice an entire debrief beforehand - be at ease with the technology.

If using an Internet-based platform test it before the session. Trial it on friends or family.

- Is it working as you expect? Is the login experience easy for them?
- Do you know how to record? And retrieve the recording at the end?
- Do you know how to be on video, to easily share your screen and to switch between documents?
- Practice zooming in and out of the Graph as part of your "walk through the structure"
- Create a rough timeline for each segment of the debrief to help keep you on track; put it where you can easily see it during the session.
- Have a backup in case Internet stability lets you down e.g. a dial in phone number or an alternative platform.

Preparation – Communicate with the Leader prior to the Debrief

Communicate information to your leader about technical requirements:

- They should set up in a private, quiet space with no distractions, comfortable chair, and desk.
- Use a desktop computer, laptop, or other electronic device, preferably with a larger screen for easy viewing.
- Ensure their camera and microphone are working.
- Camera to be kept on during the session.
- Have a note pad and pen at hand, or electronic note taking app open during the session.
- Have their mobile phone at hand during the session.

Communicate session details:

Send an email and/or calendar invitation well in advance of the scheduled debrief date, advising:

- Date, start and end times of the session
- Details of how you are going to connect e.g. the virtual meeting platform link and the alternate dial in number; conference call access details
- Your mobile phone number

Connecting via a virtual meeting platform where you can see each other is overwhelmingly the preferable way of debriefing. Phone sessions are usually recommended as a last resort.

If they are going to be on a mobile phone or handset (and not on a computer) – advise them to print out the reports and have them ready. They will be unable to properly see their reports on a mobile phone screen. ***Tip:*** *they may not have access to a home printer. Check first and don't assume.*

Share Pre Session resources (for background information):

- Advise them that you have a clear process that you follow for an optimal debrief experience, then set out that process.
- Include any resources (or links to them) that you want them to pre-read/watch.

These resources may be shared in advance of the debrief session or alternatively as part of a Kick-off or Introduction Session to the Coaching or Development Program, should you be running one.

1. LCP Brochure
2. Video: What to expect in your LCP Debrief
3. Video: Creative Vs Reactive
4. Video: The Leadership Circle Model

Or for deeper dives:

5. Bob Anderson's white paper – *The Spirit of Leadership*
6. Video: "The Leadership Imperative" video by Bob Anderson (approx. 45 minutes)

Preparation – Resources to share with the Leader at the Debrief

We prefer not to send the Graph and report to the Leader prior to the session especially if they have not yet had an orientation to the Profile. If you do pre-send, we suggest that you do so just before the debrief session or a short time before and ask them not to look at the Profile until they are with you in the debrief. You could also password protect the PDF to ensure this.

Prepare the resources you need to share at the Debrief:

1. **Have them ready to email to the Leader:**
   Attach them to an email and/or include links to where they can be accessed and downloaded. Send to your leader just before or at the beginning of the session.

2. **And have them ready on your computer**:
   Have them open on your computer, ready to access via the Shared Screen feature; be able to toggle back and forth between these pdf documents as needed.
   - **LCP Brochure or Foldout** – use to explain the Profile Structure (may wish to send beforehand). Other resource options include LCP Blank Graph, LCP Walk-Through handout.
   - **The Leader's Breakout Report** – ask them to read the written comments first. You have previously downloaded this from the Project Centre.
   - **The Leader's Graph** - You have previously downloaded this from the Project Centre.
   - **LCP Interpretation Manual** (may wish to send beforehand)
   - **Gifts in the Reactive** - optional, to use if relevant.

Tip: *Comments are a key piece of the Profile feedback. You may choose to extract the comments from the report and send an edited version (omitting anything that is too strong) to the Leader prior to the session. Their Pre-work is to review the comments and group them based on themes. In the session you can build on this and anticipate what the Graph is likely to look like. The alternative is to share the comments with them during the session and allow sufficient time to read and digest them.*

Refer to **LCGo** for other resources that support the Debrief Process.

Preparation - Resources for Your own use (not to send to Leader)

In preparation for the Leader's debrief, we recommend that you use the following handouts – download them and have them at hand for the Debrief:

- **LCP Debrief Template** – steps through the flow of an LCP Profile Debrief (or access the long version "Outline for a Debriefing / Coaching Session with the Leadership Circle Profile" in LCGo).
- **Context Questions** – we encourage you to be familiar enough with these questions, and the flow, so that you can ask them in a conversational style rather than in a scripted way.
- **Patterns & Habits Questions** – as above, we encourage you to be familiar enough with these questions, and the flow, so that you can ask them in a conversational style rather than in a scripted way.
- **Copy of the Leader's Profile for you** – with your own preparation notes and questions.

Conducting the Debrief

1. Make sure you have your own computer and the Leaders LCP and the resources you will need during the Debrief set up and ready to go before you open the session online.

2. Open the session - hello and welcome.

3. Set the Leader at ease by asking how they are doing, is there anything they need to do before they can settle and give the session their full attention

4. Check …
    - Do they have pen and paper at hand for notes or a note-taking app open?
    - Do they need to get a glass of water?
    - Do they have their mobile phone and your number at hand in case you get cut off and they need to contact you?

5. Email them the Leader Graph and Breakout report if not already done so.

6. Check your Leader has the files open and ready to work with.

    - Be sure to explain the Graph is the large circle
    - The Breakout report has the orange bar down the side
    - Do they have both open and available?
    - Are they looking at them on a regular sized screen so they can see all the details?

7. Review purpose of the debrief and how the session will unfold.

8. Start the Debrief Process.

Follow the LCP Debrief Template* process:

Ground yourselves and find your center. Just like a regular debrief, bring your undefended presence, to meet the Leader where they are at and come from a place of service

	STEPS per Template	**Resources/Notes for Coach***	**Resource sharing with Leader * (via email and on share screen)**
		"LCP Debrief Template"	
2	Overview of context	"Context Questions"	
4	Life story review	"Patterns & Habits Questions"	
5	Explain the LCP Structure ***Tip**: Experiment swapping steps 4 and 5. Knowing the Creative/Reactive structure provides a nice segue way into asking what life experiences may have influenced how they have chosen to respond.*	When you are explaining the graph, be sure to zoom in and zoom out as appropriate. Practice doing this before. It is very hard to see the whole graph on screen so sharing this way allows them to see the pieces so that they make take in the whole.	Blank Graph, LCP Profile Brochure or Foldout
6	Start with the reading the comments	You may wish to leave them alone to read these for 10mins or so OR ask them to read them out aloud to you. ***Tip**: First focus on Strengths; what is confirming, what is surprising, what patterns, themes are they seeing.*	Usually, p10 of the Leader's Breakout Report (or thereabouts)
7	Share Graph	As a guide you should be showing the Graph approx. 40-45 minutes into the session.	Leader's Graph
	Share Interpretation Manual	Email toward the end of the session	LCP Interpretation Manual

*All resources can be found in **LCGo**.*

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These virtual tips specifically apply to the initial LCP Profile Debrief. We recommend that the time frame is 1.5 to 2 hours. Please note that many of these tips equally apply to any in-person coaching session.