

Workbook on Similarities and differences between virtual and face to face procedures

I can self-confidently prepare and execute virtual and face to face procedures



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Shortcut / summary

Nowadays **more than ever virtual procedures are carried out** instead of face-to-face procedures. Events such as team meetings, product presentations, conferences and pitches and much more are daily business in the various companies. In the area of personnel diagnostics and development, it is then Assessment Centers, training, coaching or team development.

This workbook provides an overview of the general similarities and differences between the methods. Specifically, the **process of an Assessment Center procedure** is looked at, which is the **most complex** in comparison to the other events mentioned above.

- **A clear structure and framework is the basis for a safe process**
- **Checklists serve as a useful tool**
- **Pre-created solutions or back up plans help in unforeseeable situations**



Structure and framework

Frame

Each of us probably knows these meetings to which we are invited and we know nothing about this appointment in advance. We are frustrated because we know neither the **time frame** nor the **content frame** and therefore do not know exactly what our role will be in this appointment.

With every procedure, no matter what kind, a **structure that gives us information about the essential aspects is helpful.**

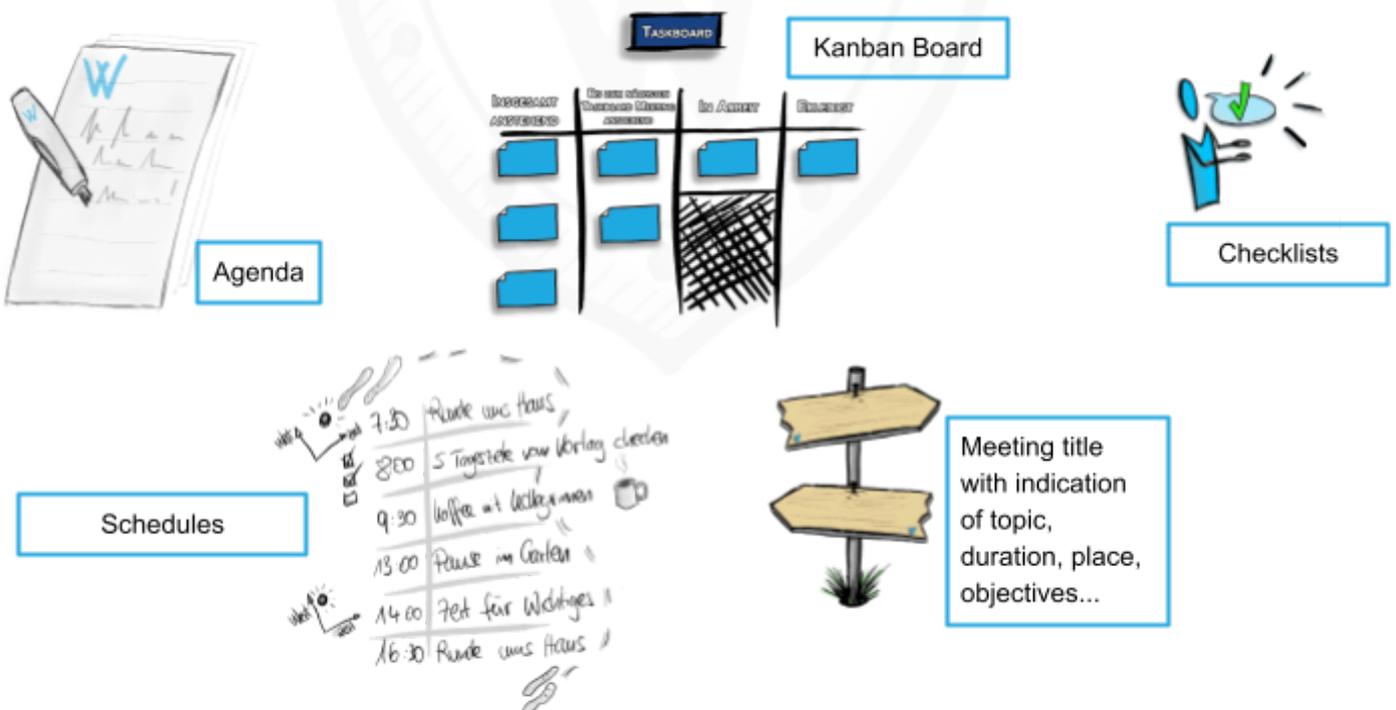
- What's the **topic**?
- What is the **time frame**?
- Where does it **take place**?
- Who **participates**?
- What are the **objectives**?
- What is my **responsibility**, task and/or role?



With the help of this information we can better prepare ourselves, **deliver a meaningful effort** within our role and help to ensure that the events can be **carried out within the prescribed time.**

Tools

Supporting tools can be the following measures and lists.



Here it is important to look for yourself, what **kind of degree do I need for the respective purpose**. Depending on the event, **different tools are useful**. It makes sense to think about the **cost-benefit aspect** in advance. In the case of a one time internal meeting, it is probably not necessary to create a finely structured agenda, since the effort does not pay off compared to the benefit. In the case of a recurring complex procedure, such as an Assessment Center, in which it is necessary to compare the individual procedures, a detailed schedule should be drawn up in order to give everyone involved an overview and security at all times.

What is your experience with organising and structuring meetings?

What are your lessons learned from it?



Assessment Center Schedule

The more complex the procedures are and the more different roles are involved within a procedure, the more essential a detailed schedule becomes. This provides **orientation** and at the same time **sets the framework**, especially for the moderation, to intervene when, for example, the time frame is expired. In an individual procedure, the dependency is lower than in a procedure with several people, since the times here are dependent and time delays have an impact on subsequent processes and people.



On the following page you find an example schedule of an Assessment Center with two participants.

Time	Participant 1	Participant 2	Observer's Team	Duration
8.30 - 9.00			Briefing	30 min.
9.00 - 9.10	Technical - Check		Break	10 min.
9.10 - 9.30	Joint start			20 min.
9.30 - 9.40	P "Check In"	Break	Introduction "Check In"	10 min.
9.40 - 9.55	"Check In"	at 9.50 P "Check In"	Observation Part. 1 "Check In"	15 min.
9.55 - 10.00	Break		Evaluation	5 min.
10.00 - 10.15	P "Interdisciplinary Element"	"Check In"	Observation Part. 2 "Check In"	15 min.
10.15 - 10.20		Break	Evaluation	5 min.
10.20 - 10.25		Introduction "Interdisciplinary Element"	5 min.	
10.25 - 10.40	"Interdisciplinary Element"	P "Interdisciplinary Element"	Observation Part. 1 "Interdisciplinary Element"	15 min.
10.40 - 10.45	Break		Evaluation	5 min.
10.45 - 11.00		"Interdisciplinary Element"	Observation Part. 2 "Interdisciplinary Element"	15 min.
11.00 - 11.05	P "Professional Element"		Evaluation	5 min.
11.05 - 11.15		Break	Introduction "Professional Element"	10 min.
11.15 - 11.25		Break	10 min.	
11.25 - 11.45	"Professional Element"	P "Professional Element"	Observation Part. 1 "Professional Element"	20 min.
11.45 - 11.50	Test "job-related attitudes" (10min.)		Evaluation	5 min.
11.50 - 12.10		"Professional Element"	Observation Part. 2 "Professional Element"	20 min.
12.10 - 12.15	Break	Test "job-related attitudes" (10min.)	Evaluation	5 min.
12.15 - 12.25			Introduction Q&A	10 min.
12.25 - 12.55			Lunch break	30 min.
12.55 - 13.25	"Q&A"	Break	Observation Part. 1 "Q&A"	30 min.
13.25 - 13.30			Evaluation	5 min.
13.30 - 14.00	Break	"Q&A"	Observation Part. 2 "Q&A"	30 min.
14.00 - 14.05			Evaluation	5 min.
14.05 - 14.30			Break	Observer's conference
14.30 - 14.35	Joint conclusion			5 min.
14.35 - 14.45	Feedback	Break	Feedback Part. 1	10 min.
14.45 - 14.55	End	Feedback	Feedback Part. 2	10 min.

This example shows the **complexity** and also the **temporal dependency** of the individual elements. So that the **quality criteria** are guaranteed within an Assessment Center, it is the task of the moderator to intervene when the end times have been reached. If **unforeseeable circumstances cause delays, these must be taken into account in the further course**, e.g. effects on the starting times of participant 2.

Face to face procedures

For face-to-face events, different **precautions** and **measures** are implemented depending on which stakeholders are involved and who has which **responsibilities**. There is often a **division of tasks** here. This workbook provides an overview of the various measures and is based on the procedure of an Assessment Center, which, due to its complexity, gives a detailed overall picture of all factors to be taken into account.

Preparatory measures

Checklists are particularly suitable for **preparatory** measures for recurring processes. In this way, everyone can be sure, even if they are already very familiar with the process, that everything has been thought of.

- Determination of the date, place and period
- Determination of the participants
- Sending out the invitation (with calendar entry)
- Room bookings
- Book catering
- If necessary, book additional equipment (beamer, flipcharts, presentation case,...)
- Prepare documents (digital/analogue)
- Print name tags
- (let s.o.) Prepare the rooms
- Seating arrangement, distributing documents,...
- If necessary, take along a backup laptop or device



Measures during the event

This aspect mentions both the points that are immediately relevant before beginning of the event and those that are important during the day. Here, too, the more complex the procedures, the more detailed the checklist.

Shortly before the start of the event (min. 15 minutes before)

- Organise the key (possibly the day before) or, if necessary, register at reception
- Prepare all technology and documents, if necessary name tags
- Short technical check
- If necessary check the signage
- Check catering supply such as coffee, tea and water



At the beginning and during the event

- Welcoming the stakeholders, if necessary picking them up at the entrance
- Notification of the organisational circumstances (rooms, location of the toilets, food, breaks...)
- Carrying out the moderation according to the procedure's schedule
- Ensure that there are no disruptions (technical, location wise,...)
- Ensure time management
- Create a pleasant atmosphere (attentive appreciative behaviour, pay attention to room temperature and oxygen content and, if necessary, initiate or request measures)



Final and subsequent measures

The measures after the event can also be divided into **two areas**. Those that **still take place on site** and those that are **subsequently carried out**, for example the next day or in the current week.

Immediately after the event

- Clean up (technology, documents, name tags, other personal data,...)
- Lock rooms and, if necessary, return the key
- If necessary, write and/or send result documents



Subsequently measures

- Write and/or send/file protocol
- If necessary, initiate further measures such as setting follow-up appointments
- Prepare review

What do you think is important for face-to-face events?

What is your experience with checklists? What are you using them for?

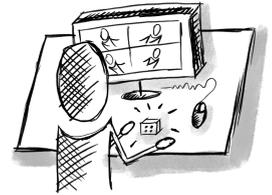


Virtual procedures

Virtual procedures require **less organisational effort** than face-to-face events. All organisational points related to external room booking and catering are eliminated. On the other hand, there is a greater **dependency on technical functionality** and, in the event of a total breakdown of the technology, it is difficult to set up a backup solution.

Preparatory measures

- Determining the date, meeting platform and duration
- Determining the participants
- Sending out invitations (with calendar entry)
- Technical check: Checking the links to the digital meeting room and the authorisation of the respective stakeholders
- Prepare documents (digital) and ensure availability for other stakeholders (sending by Mail, link, shared filing, Sharepoint, etc.)
- If necessary, set up a virtual professional background on the meeting platform
- If necessary as a backup prepare another meeting platform link



Measures during the process

- Ensure that all stakeholders are aware of how to use the technology and, if necessary, carry out a technology check up
- Exchange telephone numbers so that you can contact them quickly in the event of a failure
- Make agreements regarding the use of chat, raise your hand and other electronic aids
- Carry out the moderation according to the procedure's schedule
- Ensure that no technical faults occur and, if necessary, offer alternatives
- Ensure time management
- Provide a pleasant atmosphere (attentive appreciative behaviour)



Final and subsequent measures

The final measures are also less complex in the virtual process. There is no need to clean up or dismantle technology in event rooms.

- Write and/or send/file result documents, protocol etc.
- If necessary, initiate further measures such as setting up follow-up appointments
- Review



What is particularly important to you in virtual events? To what extent has your behaviour changed due to the increase in purely digital events?



Backup solutions

For virtual procedures

For virtual events, **prior testing of the technology is essential**. First of all, the test of the meeting platform with the **link** sent with the invitation as well as the **verification of the authorisations**. It also makes sense here to check that the **updated version is installed** and that no automated software update is planned for the computer. Such updates are often controlled externally and can only rarely be postponed to a later point in time. Installation of the update ahead of time and restarting the computer is often possible. It should also be checked whether there are any **authorisations that must be granted in advance** e.g. allow an application to share content via screen share, as is the case with macbooks.



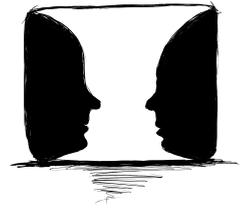
As a backup solution, an **additional link to another meeting room** is useful, for example a link to another application. If this is not possible due to corporate security settings, you should check the options for a **classical telephone conference**. It is also important to ensure the possibilities of external or internal technical support and to know how to reach them.

For face-to-face procedures

In the case of face-to-face events, a **prior inspection can be useful and helpful**. The focus is on familiarising yourself with the technology, seating arrangements, available analogue media such as a flipchart or similar. It is **important to know where you can find something**, especially when it is someone else's premises, e.g. toilets, cloakroom, contact persons, parking lots, etc.

If you cannot familiarise yourself with these in advance, you should **plan enough time before the event**, so that you **can take actions quickly** at the beginning of the event if there is a lack of materials, equipment, technical difficulties, etc. and this **does not lead to delays in the process**.

In addition, it may be useful to call the organiser beforehand, to ensure, for example, that the room has definitely been booked and that all the necessary measures have been taken e.g. possible advance payment, etc.. **Contacting them by telephone in advance** is generally useful. Sometimes there are also room changes that you would not otherwise have been informed about in advance. **A digital meeting room can be used as a backup solution** or, if necessary, **a room on your own premises**. Depending on the type of event, the options here are sometimes very limited. Postponing the event is potentially always an option, but should only be chosen as a last resort, as the resources of all stakeholders are tied up for the planned event.



What experiences have you had with poor organisation at face-to-face events?

How was this dealt with?



Links & Notes

#	Links - In-depth
1	Test Kuratorium, DU (2017a, August 7). Designing personnel selection competently: Basics and practice of suitability diagnostics according to DIN 33430 (German Edition) (1st ed. 2018). Springer.
2	Weuster, Arnulf: Personnel selection: requirement profile, applicant search, pre-selection and job interview. Berlin Heidelberg New York: Springer Verlag, 2008.
3	Obermann, C. (2006): Assessment Center. Development, implementation, trends