



Virtual Studio Guide

Topic: [Insert topic here – e.g., "Improving Patient Education Materials"]

Duration: 60–90 minutes

Facilitator: [Your Name]

Platform: [Zoom / Teams / etc.]

1. Virtual Participant Compensation

- a. Many community participants prefer cash (via Zelle or Venmo) or direct deposit payments for virtual studios. Institutions and departments differ in terms of the payment forms they offer. We encourage you to check with your finance teams to determine the types of low-threshold payments allowed and offer more than one option if possible.
- b. VISA gift cards or Amazon gift cards can both be purchased on Amazon and emailed directly to participants. We encourage study teams who use these payments to confirm the name and email address that participants would like for the gift card to be sent to.

2. Pre-Session Preparation

- a. Technology Check: Test video, audio, and screen-sharing capabilities.
- b. Calendar Invites: Send meeting link and reminder emails to participants.
- c. Pre-Read Materials: Share any background documents or resources (if applicable).
- d. Forms & Surveys: Distribute Expert Intake Form and Feedback Survey.
- e. One or more notetakers to take detailed notes.

3. Welcome & Ground Rules (5–10 minutes)

a. Facilitator Script Example:

"Good [morning/afternoon] and thank you for joining us today. My name is [Name], and I'll be facilitating this virtual focus group. With me here today are _____ my colleague and _____ the note-takers. We're here to gather your honest feedback about [insert topic]. Your input is incredibly valuable, and there are no right or wrong answers—just your experiences and opinions."

"This session will last about [X] minutes, and we are only taking notes. Everything you share will remain confidential and used only for [state purpose: e.g., improving services, shaping a new program, etc.].

b. Additional Notes for Virtual Participation:

We want to simulate an in-person conversation as much as possible. As such, we encourage:

- i. Participant Ground Rules at the start of the session that include the following guidance:
 - Find a quiet, private space to participate with a strong internet signal
 - The camera should be on, unless it is necessary to step away
 - Share freely and often, while being mindful to let others talk
 - Engage with the facilitator (s) and other participants

- Mute when not speaking
- Respect differing opinions

- ii. A second facilitator or member of the team should be assigned to keep an eye on participants and create space for those who are struggling to inject or have not had a chance to speak by asking them to share.
 - Efforts should also be made to hear from everyone when several people speak at the same time.
- iii. The hand-raising feature should be used only when a participant is struggling to interject, as it can stifle cross-participant dialogue and disrupt the natural flow of conversation.
- iv. Similarly, we discourage the use of the chat as it can restrict participant dialogue and be a source of distraction.
 - Zoom allows hosts to modify the chat feature so that participants can communicate with the hosts as needed, but not one another.
 - If a participant encounters audio problems, chat access can be modified to allow all participants to post in the chat.

4. Participant Introductions (5–10 minutes)

- a. "Let's go around and quickly introduce ourselves—your name, where you're from, and one thing you'd like to get out of today's discussion."
- b. You can also include an icebreaker (e.g., favorite fall activity) as a way to get to know one another better.

5. Warm-Up Questions (5 minutes)

- a. What comes to mind when you hear the term [topic]?
- b. How familiar are you with.... (program/material; customize to the study or/and research).

6. Core Questions (40–60 minutes)

Organize questions from general to specific. Keep them open-ended and probe for detail.

Example Questions:

- a. Experience & Awareness
 - Can you describe your experience with [topic/service/material]?
 - How did you first learn about it?
- b. Usability/Accessibility
 - Was it easy to understand/use/navigate?
 - What barriers, if any, did you face?
- c. Impact
 - Has this had any impact on your [health decisions, workflow, etc.]?
 - What changes did you notice?
- d. Improvements
 - What could be improved?
 - What features or information would you like to see added?
- e. Closing
 - If you could change one thing, what would it be?
 - Any final thoughts or suggestions?

7. Wrap-Up & Next Steps (5 minutes)

- a. "Thank you again for your time and thoughtful feedback today. Your insights will help us [briefly explain the intended use of the data. If you think of anything else after today, feel free to contact me at [email]."]"

- b. "We'll follow up with [any next steps, e.g., a thank-you email, compensation, future updates, etc.]."

8. Post-Session

- a. Save and organize notes/transcripts
- b. Send thank-you/follow-up email
- c. Begin analysis (thematic coding, summarizing key takeaways)

Notes to Facilitator: Tips for Facilitating a Virtual Group

1. Set the tone early

- Model warmth, openness, and neutrality from the beginning.
- Use a welcoming tone and brief small talk to help participants feel comfortable in the virtual space.
- Reinforce that all perspectives are valued and that the session is confidential.

2. Actively manage turn-taking

- Because virtual settings limit natural conversational cues, be proactive about inviting participants to speak.
- Use participant names to guide the flow ("Let's hear from Maria next, and then John.").
- If people speak at the same time, pause, thank them, and choose the first speaker; reassure the other person that you will come back to them.

3. Balance voices and encourage quieter participants

- Notice who hasn't spoken and gently invite them in:
 - "I want to make sure we hear from everyone—does anyone who hasn't spoken yet want to share their thoughts?"
- Avoid putting anyone on the spot; frame invitations as optional.

4. Use verbal and visual cues intentionally

- Affirm contributions with brief phrases ("Thank you, that's helpful") while keeping the conversation moving.
- Nod, smile, or use other visible cues (camera on) to signal engagement.
- Check occasionally that participants can hear and see you clearly.
- Consider sending the slides to participants in advance of the meeting or putting them in the chat at the beginning of the meeting. This will allow the facilitator to stop sharing the screen at different time points and enable the facilitator to see all participants and for the participants to see one another.

6. Probe and deepen responses

Use probes sparingly but effectively, such as:

- "Can you give an example?"
- "What makes you say that?"
- "How does that compare to your experience in [context]?"

Avoid leading questions that imply a preferred answer.

7. Keep the session structured but flexible

- Move through questions at a reasonable pace, but remain responsive to emerging themes.
- If conversation drifts, gently redirect:
 - “That’s an interesting point. I want to make sure we also cover....”

8. Normalize disagreement

- Remind participants that differing viewpoints are expected and valuable.
- If tension arises, acknowledge it and reframe constructively:
 - “It sounds like people are having different experiences, and that’s helpful for us to understand.”

9. Monitor energy and engagement

- Virtual settings can feel more draining; keep the group energized by varying who speaks and affirming contributions.
- If responses shorten, shift to a more open prompt or ask for examples.

10. Support note takers

- Pause occasionally to allow note takers to capture key points.
- Summarize periodically to check accuracy and invite corrections.

11. Close with gratitude and next steps

- End on a positive, appreciative note.
- Clearly state what will happen next and when participants will receive compensation.

These are best practices; however, we encourage you to adapt based on what works best for you and your virtual studio participants. [Please schedule a consultation](#) with the CEO core should you need any guidance in preparing to conduct a virtual studio.