RUNNING EFFECTIVE VIRTUAL MEETINGS

APRIL 2020

GOOD PLANNING = GREAT STARTS

- As the word cloud illustrates, there are many challenges to running effective virtual meetings.
- Aside from technical issues, the biggest problem is engagement.
  - Virtual modes of collaboration and communication, group cohesion and intimacy decreases.
  - Harder for people to fully engage with each other.

BEST PRACTICES FOR VIRTUAL MEETINGS

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CO-CREATE YOUR TEAM'S RULES OF ENGAGEMENT OR VIRTUAL MEETING NORMS

Rules of meeting engagement or 'meeting norms' are stated standards that refer to process, preparation and communication practices which can apply to any meeting. Virtual meetings may have some specific norms, for example:

- ✓ We will use the technology that is most accessible to everyone on our team.
- ✓ Test your technology before the meeting and resolve any technical issues.
- ✓ Use phone line with audio clarity and stability.

- ✓ Do not multi-task (do other work) during the meeting.
- ✓ Follow an organized line up to ensure each person has a chance to respond.
- ✓ Find a quiet space to participate.

- ✓ Use the mute button at your site to prevent the transmission of background noise.
- ✓ Speak up to get attention if you have something to say.
- ✓ Turn on your video whenever possible and be camera ready.

PROCESS NORMS

- ✓ We will respect everyone's time by starting and ending on time.
- ✓ Only one conversation at one time. Refrain from side-talk.

- ✓ Capture off topic items in a 'parking lot' and agree to discuss them later at a more appropriate time.
- ✓ Be present with the people you are meeting with. Put away phones and other devices during the meeting.
- ✓ Take breaks as needed.

- ✓ Everyone is responsible for helping to stay on topic. Speak up if you feel like we're getting off track.
- ✓ Address conflicts head on.
- ✓ Look ahead to positive action, not back on shoulda, woulda, coulda.

- ✓ Aim for GETGO – good enough to go, not perfection.
- ✓ Everyone is responsible for upholding the norms. Acknowledge if you notice we are not doing so.

PREPARATION NORMS

- ✓ Be prepared and come ready to engage. Read the agenda and do any prework ahead of time.
- ✓ Come empowered to make commitments for your area or function.
- ✓ Put aside other topics and work so you are ready to focus on the discussion at hand.
- ✓ Meeting material and agenda should be sent 48 hours before a meeting [Or as determined by your board]

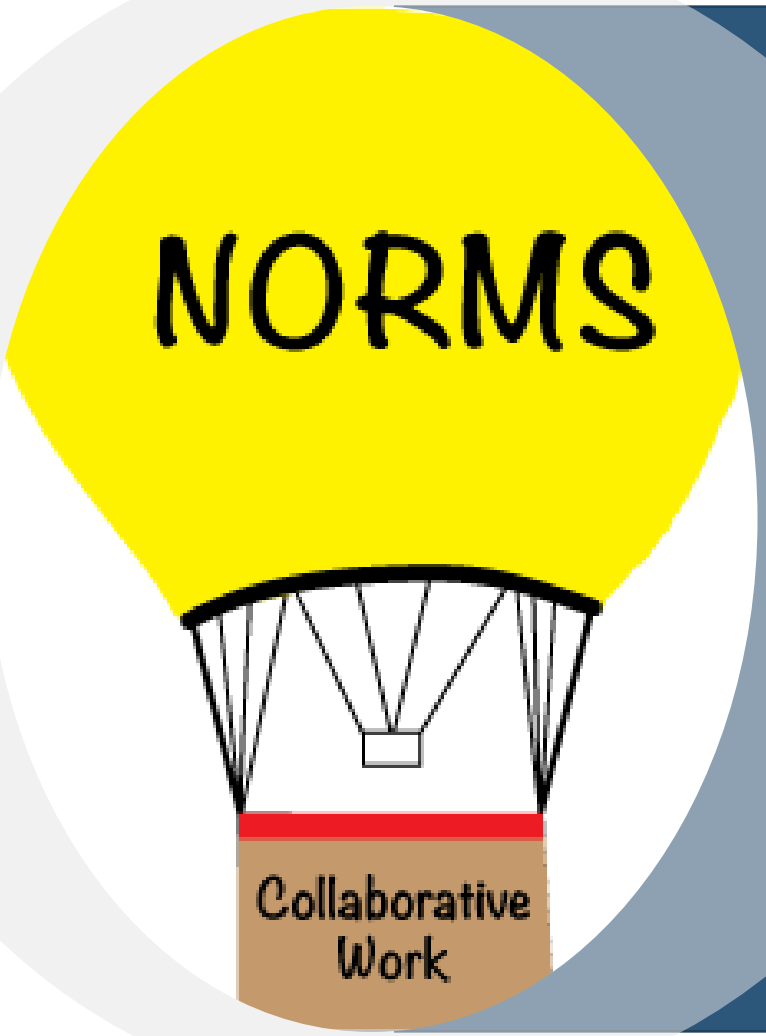
COMMUNICATION NORMS

- ✓ Ask questions for clarification to help avoid making assumptions.
- ✓ Make sure everyone's voice is heard.
- ✓ Balance your participation – speak and listen.
- ✓ Listen actively without interrupting others.

- ✓ Clarify when you are advocating vs. offering an idea.
- ✓ Say it now, in the room. Avoid waiting until later to raise an issue.
- ✓ All voices count. All opinions are valid but offer reasoning behind your thinking.

MEETING NORMS

- ✓ Should be shared with your meeting notice and/or with your agenda.
- ✓ Are used to reinforce different behaviors.
- ✓ Help you improve your virtual meeting process.
- ✓ Should be a short list of no more than six (6) norms.
  - ✓ Too many become hard to remember and follow.
  - ✓ Some norms need to be explicit in the beginning but eventually become standard, like starting on time.
- ✓ Co-created, discussed and agreed upon with your board for them to work.



VIRTUAL MEETING DESIGN IS MORE THAN AGENDA PLANNING

Virtual meeting design requires more designing.

- ✓ Think through purpose, roles, meeting norms, materials, facilitator agenda, technical, scheduling and communication.
- ✓ For better engagement, identify different people to assume different roles on a rotating basis. Roles may include:

Virtual Meeting Design Checklist

Purpose:	
Date/Time:	
Participants: How many? Name, Contact Info, Time Zone	
Rotating Roles -Facilitator -Bridge Facilitator -Greeter -Note Taker -Time Keeper -Tech Support	**Meeting Norms:** 1. 2. 3. 4. 5. 6.
Materials Participant Agenda w/ Times Background Reading Pre-Work	**Facilitator Agenda:** Based on the participant agenda, map out process steps including framing, engagement, and technology tools needed.
Technical Participant /Host Call-In/Online Log In Plan B Dress Rehearsal for Facilitator Agenda Technical support before/after meeting	**Communication/Scheduling:** Recurring Time Zones Calendar Invitation Reminders Follow Up Notes

EXAMPLE

- ✓ Facilitator: Designs and facilitates meeting.
- ✓ Secretary/Note Taker: Takes action notes/takeaways and emails them to everyone right after meeting.
- ✓ Technical Support: Helps with technical troubleshooting
- ✓ Bridge Moderator: Someone who can assist remote participants in a face-to-face meeting or those unable to use a video conference platform or facilitates in the chat.
- ✓ Timekeeper: Keeps time.

AVOID TECHNICAL SNAFUS

Technical problems will happen, have a Plan B or a way to avoid falling into the pit of technical despair – meeting gets derailed because of one person's technical issue.

- ✓ Make sure everyone troubleshoots their technical issues before the meeting, if possible.
- ✓ Many platforms have a technical testing page and good tech support.
  - ✓ Include those links ahead of your meeting.
- ✓ See resource handout for common virtual meeting technical issues and fixes.

NOTE: Write out a step-by-step facilitator agenda if using a new technical tool and rehearse it. And, always have a plan B. Some examples: if your platform drops callers, be a little flexible with the agenda. If someone is supposed to share their screen and is having a technical problem, make sure people have copies of the document and at minimum, you as the facilitator, so you can share your own screen.

CREATE A LINE FOR PARTICIPANTS TO FOLLOW

- Establish a method to call in participants.
  - Alphabetical order by first or last name.
  - Video-conferencing platform by order on the screen.
- For audio-only conference call platform, use the clock technique.
  - Assign participants numbers at the top of the meeting.

NORMS FOR SPECIFIC TYPES OF MEETING CONVERSATIONS

There are many types of conversations that happen during a meeting.

- Every conversation will benefit from selecting norms that specifically relate to that type of discussion.
- Consider how a meeting might go differently if a brainstorm session has the norm “all ideas are good ideas” compared to “keep our resource constraints in mind.”

MEETING NORM TYPES

BRAINSTORMING NORMS

- All ideas are good ideas.
- Build on the ideas of others. Use "Yes, and…"; avoid "No, but…"
- Defer judgment of ideas during brainstorming.
- Keep resource constraints in mind.

BOARD MEETINGS

- Be concise and to the point.
- Be open to feedback.
- Share only new information, not a repeat of old information.
- Be sure your information is accurate.
- Acknowledge when you don’t have an answer but will provide it after the meeting.
- Share celebrations and challenges alike.

DECISION-MAKING

- We will use [consensus, consultative, majority rule, voting] as our decision making process.
- Each person is responsible for ensuring they understand the options and arguments before making the decision.
- Be willing to support a consensus even if you initially do not agree with it.
- Do not push your ideas on the participants after a decision has been made.
- Acknowledge when you are playing “devil’s advocate” to help test a decision or idea.
- Separate your own personal feelings from what’s best for the organization.

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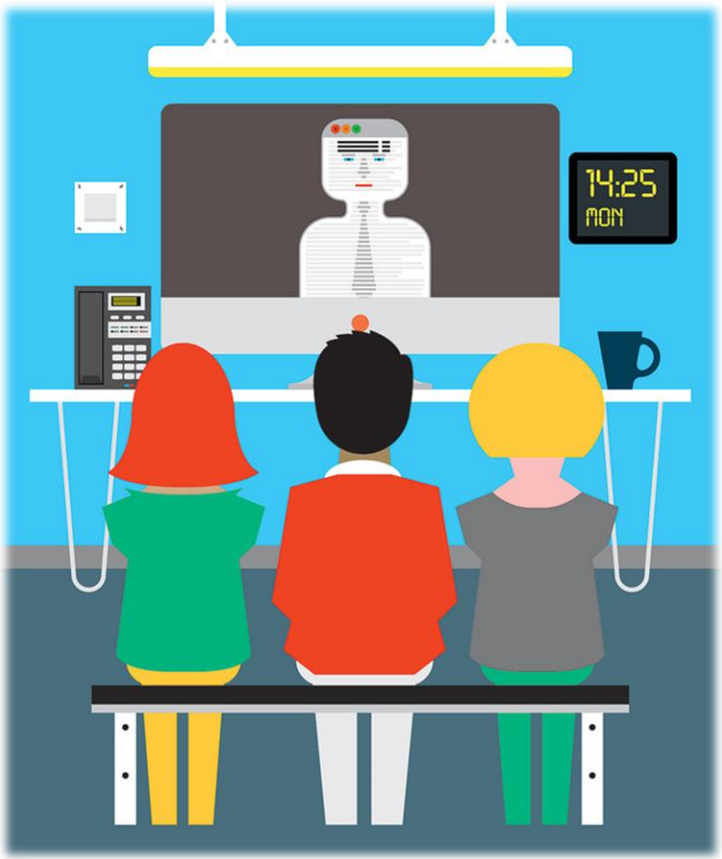
WAYS TO EVALUATE AND CONTINOUSLY IMPROVE VIRTUAL MEETINGS

Your meetings will get better over time if you allocate 5 or 10 minutes at the end of the meeting to evaluate;

- How it went and what you need to improve.

❖You can use the same methods you would use to evaluate any meeting or training.

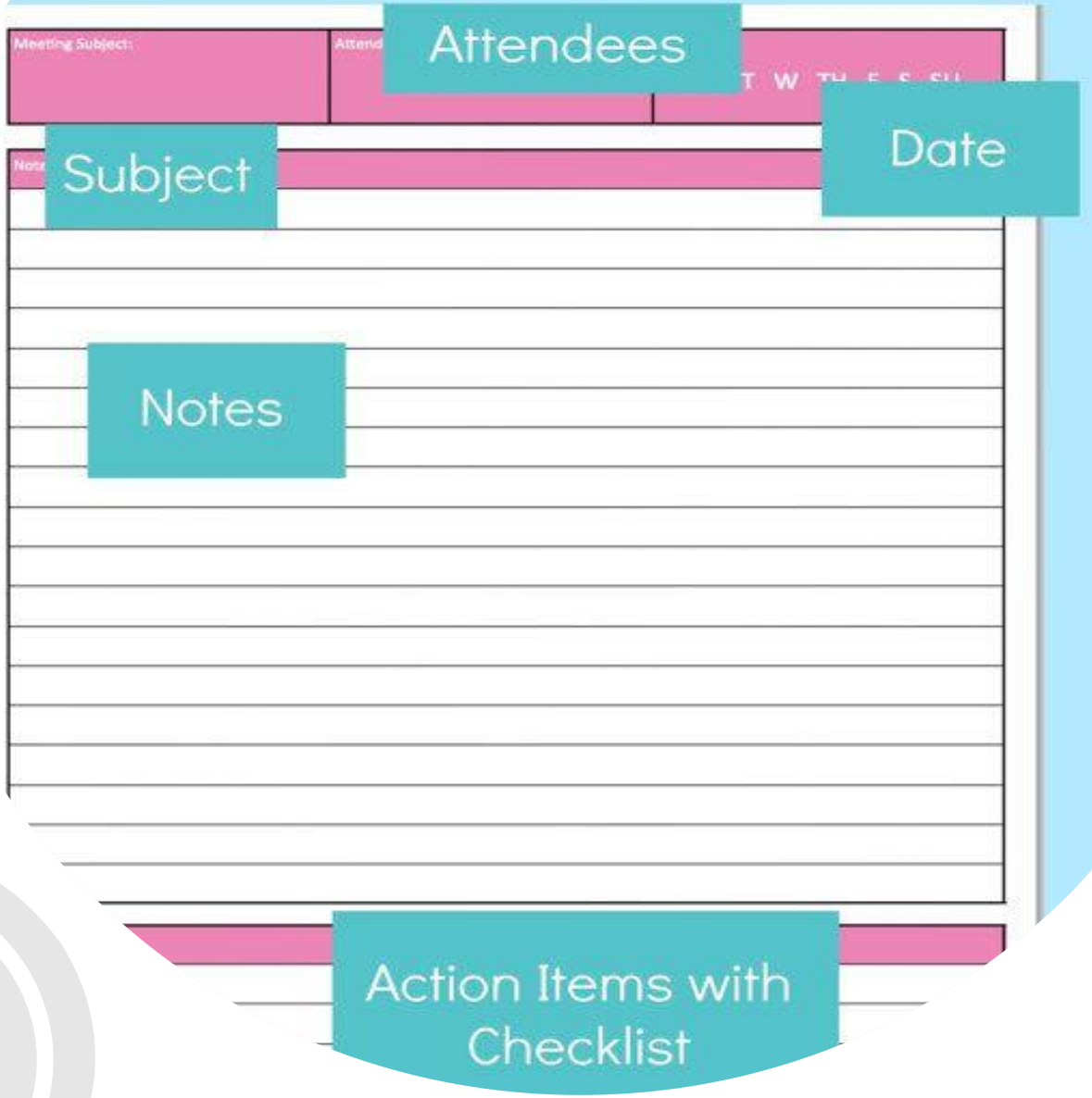
HYBRID MEETINGS: MIXING VIRTUAL AND FACE-TO-TACE PARTICIPATION



- Use a Bridge Moderator when you have both people in the room and remote participants.
  - Ensures there is a linkage between virtual and real time participants.
- Reminds people in the face-to-face meeting that virtual participants are part of the meeting.
- Checks to make sure virtual participants an hear, see, and speak.
- If using video conferencing, project remote participants on the screen.

SEND MEETING NOTES THAT PEOPLE ACTUALLY READ

- People are so under-resourced and busy; they don't often have time to go through meeting minutes and reading them to figure out what they missed out on.
- Most people rely on what was mentioned verbally in a meeting – which can lead to miscommunication.
- A brief, concise follow-up email *that summarizes who is working on what* is a lot more effective than meeting minutes.



WEBSITE RESOURCES

- 28 Tools for Online Brainstorming & Decision Making in Meetings
  - https://blog.lucidmeetings.com/blog/25-tools-for-online-brainstorming-and-decision-making-in-meetings
- Virtual sticky notes to evaluate meetings
  - http://linoit.com/users/kanter/canvases/Virtual%20Meeting%20Evaluation
- How to take notes in meetings
  - https://blog.lucidmeetings.com/blog/how-to-take-notes-in-meetings
- The Ultimate List of Virtual Team Technology Tools
  - https://www.thecouchmanager.com/the-ultimate-list-of-virtual-team-technology-tools/
- Online collaboration Tools
  - https://online-collaboration-tools.zeef.com/robin.good
- Meeting Solutions Reviews
  - https://www.gartner.com/reviews/market/meeting-solutions
- Collaboration Super Powers
  - https://www.collaborationsuperpowers.com/tools/
- 8 Fabulous Meeting Facilitation Playbooks
  - http://www.bethkanter.org/meeting-playbooks/

THANK YOU!