



Seven Proven Best Practices for Virtual Meetings

In the best of times, scheduling meetings at convenient times and locations can be a chore. These days, with our over-filled schedules and colleagues spread across the globe, it seems the face-to-face meeting may go the way of the buggy whip and \$1/gallon gasoline. Holding virtual business meetings – via teleconference, video conference, or even web conference – just makes more sense. Unfortunately, few of us have been trained on the art and nuances of conducting an effective, results-oriented virtual meeting.

We've identified seven best practices, based on extensive research, interviews and experience (mostly through trial and error), that can dramatically increase the effectiveness of your virtual meetings. Although following these will not ensure a successful meeting, *not* following them will ensure a miserable meeting.

Best Practice Number 1. Get Organized!

Virtual meetings can't be conducted "on the fly" or without considerable forethought and planning. Those who use teleconferences regularly and successfully will testify that these meetings require greater amounts of preparation than a face-to-face session.

Things to do before the meeting:

- ***Make the pre-meeting plan very explicit.*** Spend the time on a more detailed plan than you would for a face-to-face meeting.
- ***Send out an agenda and supporting documents one day before the meeting.*** By sending out an agenda in advance of the meeting, you're ensuring that everyone on the team will be on the same page, so to speak. It's a good idea to add a background section to the agendas, too. This section should summarize the events or situations that led up to the meeting.
- ***Ensure each participant knows how the meeting is going to go.*** Map out the meeting process and send a copy of the plan to every participant.
- ***Distribute photos and short biographies.*** Arrange to collect photos and biographies from every participant to be placed online or sent with the agenda prior to the meeting.



- ***Inform attendees of new or visiting members' backgrounds and expertise.*** A good way to do this is to create a document with a short biography of each new or visiting person and to send it with the agenda before the meeting. It's also best to take a few minutes at the beginning of the meeting to give a verbal summary of the background and expertise of the new or visiting attendee.
- ***Include page and paragraph reference designators in documents.*** Often, you'll want to refer to specific documents during meetings. Be sure to send out those documents with the agendas. Every document should include page and paragraph reference designators so the team can follow along easily with the verbal discussion.
- ***Have a fallback plan.*** Know how you will restart the meeting, should equipment fail. Also, know who your technical contact is at each site and know how to reach that person during the meeting time. Send a copy of the fallback plan to every meeting participant.

Best Practice Number 2. Assign meeting roles.

Another key to organizing virtual meetings for optimal payout is to assign each participant a role to play throughout the session.

Most teams find it useful to rotate the meeting role(s) so that responsibilities are shared. Whatever you choose to call them, consider assigning these four important roles for each meeting:

- ***Leader.*** The leader organizes the meeting and facilitates it. Although distance managers often play this role themselves, rotating this assignment gives other team members a chance to learn leadership skills and share in the management roles and responsibilities. Typically, the leader keeps the group on track by assuring that the most important parts of the agenda are covered in the allotted time.
- ***Scribe.*** The scribe keeps notes for the meeting and distributes them afterward. He or she pays special attention to key decisions made, important information shared, and action items that need to be followed up on.
- ***Gatekeeper.*** The gatekeeper watches the gate of participation and opens it to those who haven't participated much, while closing it to those who have had a disproportionate amount of talk time. (The gatekeeper might say something like, "Thanks for your input, Jane. Mary, what are your concerns?")
- ***Participant.*** Although it may seem that being a participant isn't a specific meeting role, effective groups soon discover that everyone in the meeting has certain responsibilities, such as supporting group decisions, honestly expressing their views, sticking to the agenda, and respecting others. Having these types of expectations clarified, prior to teleconferencing, makes the meeting more effective and efficient.



Pest Practice Number 3. Use people's names.

When you cannot see the meeting participants, it is sometimes difficult to know who is speaking. This can result in confusion both during the conversation and afterwards, when people are unclear about who said what or who took which assignments. It also makes it more difficult for the scribe or note taker to identify assignments and to accurately capture the meeting proceedings.

At the start of the meeting, have the members at each site introduce themselves.

Then set the guideline that each individual will identify her or himself each time they speak. This degree of discipline will keep the meeting clear and on track.

Before saying anything, identify yourself.

It's often difficult to know who is speaking on teleconference calls. To eliminate possible confusion, always identify yourself before making statements or asking questions. It's sufficient to simply say, "This is [your name]."

If you're speaking directly to someone, say the person's name first to indicate this.

Because you can't see your teammates, and they can't see you, it isn't obvious whether you're talking to the group or to an individual. Eliminate confusion when you speak directly to an individual by saying her name. For example, "This is [your name]. Betty, can you..."

The gatekeeper might also have name tents made up for each participant, whether they were on-site or not. Having a name tent at an open chair, for each of the off-site participants, made it easier to remember that there were other people in the meeting who needed to be included and who didn't have the advantage of being within viewing distance of the speakers. Participants later reported that this was a helpful reminder.

Best Practice Number 4. Remember that silence is not consent.

The leader can perform a very helpful service by checking with each individual when decisions are made, to determine whether they are in agreement and will support the implementation and outcome of the decision. Without visual stimulation to keep participants engaged and alert, it is easy to check out or to abdicate ownership for decisions the group solves.

Make sure that every person voices his or her concerns before closing on a decision.



Best Practice Number 5. Visual cues, in particular, can be very helpful.

One Hewlett-Packard operation found that they could communicate more effectively by stating what they assumed people were doing, but which they could not see for themselves. They would ask, "Marion, are you shaking your head and wincing right now?" or, "Bill, are you smiling at that last comment?" rather than have unconfirmed pictures like this in their minds.

An even more direct application of this tip is to have people articulate the things they see themselves or others doing that are invisible to distant team members. You might say, "I'm holding up that report we did last month because I'm afraid we've already forgotten it," or, "You guys should see Lee right now; she's holding her hands around her throat like she's choking."

Best Practice Number 6. Be especially careful about background sounds over the phone.

It's difficult enough to incorporate technology with meetings, without having to battle with avoidable distractions. Luckily, some Web conference programs now allow the instructor/coordinator to remotely mute the audio portion of the conference for a distracted participant who doesn't realize the noises he or she is making.

Best Practice Number 7. Provide training and preparation in the effective use of the various technologies of virtual meetings.

As with any other technology, teleconferencing, video conferencing, and Web conferencing require that people be properly prepared in order to make the best use of the technologies. Teach participants both the technical skills (e.g., how to join the conference or add someone in) and the social skills necessary to complete the conferences successfully. Both types of skills are important. Don't assume that just because someone knows how to use a telephone or a computer, they will make effective use of the technology.

Virtual meetings can provide huge time and cost savings to an organization. However, they cannot be treated as "just another meeting." Employing these seven best practices will ensure that your virtual meetings make effective use of your participants' time and that you achieve your desired results...thereby decreasing your costs, maximizing the return on your time investment, and increasing the overall effectiveness of your organization.



Where to go from here

This paper merely touches the surface of developing your own best practices for virtual meetings. If you need help improving the effectiveness of your meetings, consider cube 214 consulting. We offer the following services to help you:

- ***Change Management:*** We provide resources for organizations grappling with change to assess their current performance, gain commitment to a common vision, and execute their strategies.
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- ***Talent Management:*** We develop a comprehensive strategy to attract, hire, and retain the very best employees for your organization.
- ***Instructional Development:*** We design employee training development to help you onboard new hires, improve employee engagement, or help roll out a change more smoothly.
- ***Facilitation Services:*** We provide skilled facilitation services, including meeting planning, workshop process design, and facilitation training.

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About the Author

Anil Saxena has more than 17 years of experience in organizational development and talent management. He's helped both Fortune 500 companies and mid-sized firms across industries increase customer and employee engagement while decreasing turnover, improving customer retention, and increasing profitability within organizations. He delivers his creative and enthusiastic approach with a common sense, easy-to-understand style.