How to Run Effective Virtual Meetings

☑ **Checklists for Success**

☑ 'Pre Flight' Checklist – Planning a Meeting

WHY: What do you want to achieve?
And... is a meeting really the best way to achieve this?

There are 5 questions to ask when there is a task to be managed remotely by several people:

1. Is this task mainly about sharing information, or is it more about building the relationship between team members/colleagues?
2. Does the task need to be carried out by people at the same time (synchronously) or can it be better managed by people at different times (a-synchronously)?
3. Is the task simple or complex?
4. Is the technology available for managing the task accessible to everyone involved, and how effective is that technology?
5. Are all team members competent in working with this technology?

The table below gives an overview of different tasks and the appropriate technology to deal with each of these. This will guide you in selecting the best technology for the task.

	Exchanging information	Producing documents	Explaining / having difficult conversations	Brainstorming and discussing	Building relationships
Email	😊 (green)	😊 (light green)	☹️ (red)	☹️ (red)	😐 (yellow)
Text message	😊 (green)	☹️ (red)	☹️ (red)	☹️ (red)	😊 (light green)
Chat	😊 (green)	😐 (yellow)	😐 (yellow)	😐 (yellow)	😊 (light green)
Phone	😊 (light green)	☹️ (red)	😐 (yellow)	😊 (light green)	😊 (green)
Phone conference	☹️ (red)	☹️ (red)	😐 (yellow)	😐 (yellow)	😐 (yellow)
Video conference	☹️ (red)	😐 (yellow)	😊 (light green)	😊 (green)	😊 (green)
Video conference 2.0 (Halo/Telepresence)	☹️ (red)	😊 (light green)	😊 (green)	😊 (green)	😊 (light green)
Web meeting platform	☹️ (red)	😊 (green)	😊 (light green)	😊 (green)	😊 (light green)

WHAT do you need to include on the agenda to achieve the desired outcome?

- Virtual Café (10 minutes pre-meeting)
- Check In
- Topic 1
- Topic 2
- Topic 3
- Conclusions
- Decisions
- Actions

WHO needs to attend the meeting in order to achieve the desired outcome?
Remember to take into account each attendee's

- Level of experience in meeting virtually
- Knowledge / expertise on subject X
- Expected attitude or opinion about subject X
- Personality traits: is s/he more introverted or extroverted? Does s/he focus on detail, or more on the overview/'big picture'?
- Cultural background.

Also consider relationships within the group, and group dynamics. What kind of behaviour might you expect from your attendees?

WHEN should the meeting take place?
- So - again - is a synchronous meeting strictly necessary?
- If so, how much time is available? (Remember that 60 minutes is the maximum time to meet virtually without a comfort break.)
- What time zone works best for this particular group? *www.timeanddate.com/worldclock/meeting.html*
- Remember to rotate the 'inconvenient' meeting hours (eg before 8 AM and after 6 PM) so that the burden of early/late meetings is shared equally among all attendees.

HOW to achieve the desired outcome?
- What pre-work, reading or preparation needs to be done, by whom, when?
- Allocate roles in the meeting, eg Chairperson, note-keeper, producer if needed, expert?
- How will decisions be made? What process will be used eg voting, consensus or decision by the leader?
- How will action items be recorded and distributed?

☑ 'Taxiing' to the runway – Preparing the meeting

TECHNOLOGY – getting ready

- Does everyone have access to this technology?
- Is everyone trained / familiar with this technology?
- What was connectivity and audio quality like last time? Does it need to be re-tested?

ACTION – send invitations

- Purpose (Why?) of the meeting
- Agenda (What will we discuss?)
- Preparation required (In advance of the meeting)
- Time (When is the meeting?) and joining link (How will we join it?)
- Process (How will the meeting be run?)
- Meeting 'Hygiene' – please see below.

MEETING HYGIENE – Inform all participants of these key practical points

- Call in from your individual work station; preferably not with a colleague – this avoids technical issues, but also a sense of 'us and them' if some people are in pairs/groups.
- A USB plug-in headset is best, a phone line is second choice
- Join from a quiet, private place

- Check equipment batteries – they need to last for the whole session
- For a web meeting (WebEx, GoToMeeting, Adobe Connect or other) write down the phone number for connecting with the meeting by phone and also the meeting reference number and participant phone numbers
- Notify colleagues in advance that you will be in a virtual session and should not be disturbed
- Have a glass of water handy – it keeps your voice clear and lubricated
- Call in 10 -15 minutes early: to check equipment and chat informally
- Turn off email, phones, instant messaging tools, and clear other distractions away from your desk
- Slow down, focus and get ready to engage
- Remember that emotions get amplified in virtual space. If you are nervous, anxious, under pressure or irritated, these feelings will seem bigger in a virtual meeting. Be clear and open about how you are feeling during the Check In – it helps build trust and prevents 'difficult' feelings from building up if unaddressed, thereby making the meeting less effective
- Generally - be prepared.

☑ 'Take Off' – Opening the meeting

- Call in early to test connectivity, audio and tools
- Offer 'Virtual Café' time pre-meeting, to deal with technical issues and so that people can connect socially
- Start on time – delaying the meeting to solve one person's technical issues often makes others bored and disengaged
- Offer a 'Check In' and make sure everyone's voice is heard within the first 10 minutes.

CHECK IN

Check In is a process at the beginning of a meeting that:
- Includes all participants
- Helps them to focus and be fully present in the session.

Check In is a structured introduction, not a discussion, so the Chair should:
- Strictly limit the air time for each person
- Make sure each person talks without being interrupted by others.

Suggested questions for Check In:
- How are you today?
- What's on top of your mind right now?
- What are you hoping to get out of this meeting?

Check In should be done in a manner that is consistent with the cultural backgrounds of participants. Set aside around 8 minutes for a Check In with a group of 8 ie about one minute per person.

✓ Cruising Altitude – During the meeting

- Remember to pay attention to maintaining positive group dynamics as well as achieving the task
- Provide enough air-time for all attendees (not just those who like to talk)
- Welcome 'late joiners'
- Limit presentations and monologues to 4 minutes each – longer decreases engagement in virtual meetings
- If someone leaves the session, s/he should notify the group
- Encourage spontaneity; overstructuring a meeting kills natural human interaction, such as laughing and interruptions
- Listen carefully – not just to what is said but also to silences that occur
- Take frequent short breaks. We recommend a 5 minute break every hour and meetings of a maximum of 2 hours duration. Encourage participants to leave their work station during the breaks.

Concentration, Focus And Engagement: Keep meetings interactive

- Move lengthy exchange of simple information, pre-reading etc., out of the meeting - use the time together for doing active work
- Impose a 4 minute limit on presentations and monologues
- Invite and include everyone's voice during the meeting
- Encourage use of annotation tools (writing and drawing) and chat to engage people
- Encourage informal chats between people
- Provide frequent breaks, eg after 1 hour maximum
- Ask for feedback offline on meetings and your virtual leader-ship style.

☑ Checklist: Descent

Check Out

Check Out is the 'virtual handshake' that people give each other before leaving the meeting.

Check Out comes at the end of a meeting and:
- Includes all participants
- Helps bring closure to the session / meeting
- Encourages everyone's commitment to the team

Suggestion for Check Out questions:
- What is your most important 'take away' or learning point from this meeting?
- Have your expectations been met?
- What can we do better next time?

Count on 5 minutes for a group of 8.
Close the meeting on time!

☑ Checklist: Landing

- Distribute action list and decision immediately
- Distribute reading and other materials
- Follow up on action items
- Inform 'relevant others' of meeting outcomes/actions.

☑ Checklist: After landing

Team Effectiveness Feedback Form

If you want to increase the effectiveness and atmosphere of your virtual team meeting, consider using this survey tool to assess how effective your meetings are currently and discuss the results with the team to define action points for improvement.

	1 Strongly disagree				5 strongly agree
TECHNOLOGY					
The technology we used was the best option for this meeting	1	2	3	4	5
Audio quality was good	1	2	3	4	5
Connectivity was good	1	2	3	4	5
Everyone was able to access the virtual meeting	1	2	3	4	5
We made good use of the features available on this meeting platform	1	2	3	4	5
TASK					
The invitation was clear to me	1	2	3	4	5
The pre-work was timely and relevant	1	2	3	4	5
The objectives were clearly stated	1	2	3	4	5
We understood what we were meant to do	1	2	3	4	5
A decision-making process was agreed upon	1	2	3	4	5
Discussion focused on the objectives	1	2	3	4	5
We explored options thoroughly	1	2	3	4	5
Available time was used productively	1	2	3	4	5
Conclusions were reached	1	2	3	4	5
We started and finished on time	1	2	3	4	5
The Chair was well-prepared	1	2	3	4	5
PROCESS					
Everyone participated	1	2	3	4	5
We sought information from all members	1	2	3	4	5
We listened to and respected each other's ideas	1	2	3	4	5
We acknowledged each other's ideas	1	2	3	4	5
No one dominated the discussion	1	2	3	4	5
There was no pressure to accept anyone's point of view	1	2	3	4	5
Disagreements or conflict were handled well	1	2	3	4	5
RESULT					
Action plans were developed	1	2	3	4	5
I feel committed to the decisions /actions discussed	1	2	3	4	5
There was a balance between task focus and relationship focus	1	2	3	4	5
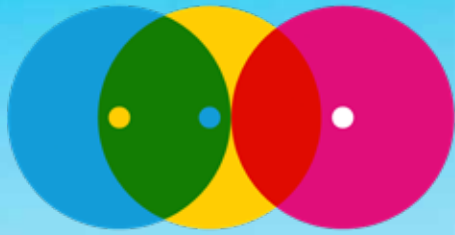
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