



# SUCCESSING IN A WORLD OF VIRTUAL MEETINGS

March 2020

# THRIVING IN A CHANGING ENVIRONMENT



In the past, there were two primary justifications for having a virtual meeting: **cost** or **convenience**.

In-person meetings were the default and business cases had to be made to invest in virtual meetings.

However, we face a new environment, where the primary justification is **safety** and there must be justification to not use virtual meetings.

To be successful in this new environment, you must **consciously** and **purposefully** create better virtual meeting experiences.

# FOUR AREAS OF BEST PRACTICES



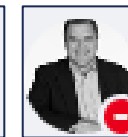
- Embrace the Change
- Best Practices as a Participant
- Best Practices as the Host
- Tips for Special Situations

# CONNECTION IS A TWO-WAY STREET

## Embrace the Change

### If you have Instant Messaging Software (like Skype, Slack):

- The green check means that their calendar is free – it does not mean that they are waiting for you to contact them to give them things to do.
- If an IM arrives, you do not have to answer it immediately.
- Proactively set your status as busy or do not disturb.



### To be healthy and productive:

- We need to feel an emotional connection with others.
- We need to feel a sense of belonging.
- We want others to feel connected to us.

# CONNECTION IS A TWO-WAY STREET

## Embrace the Change

### Empathy will make the difference

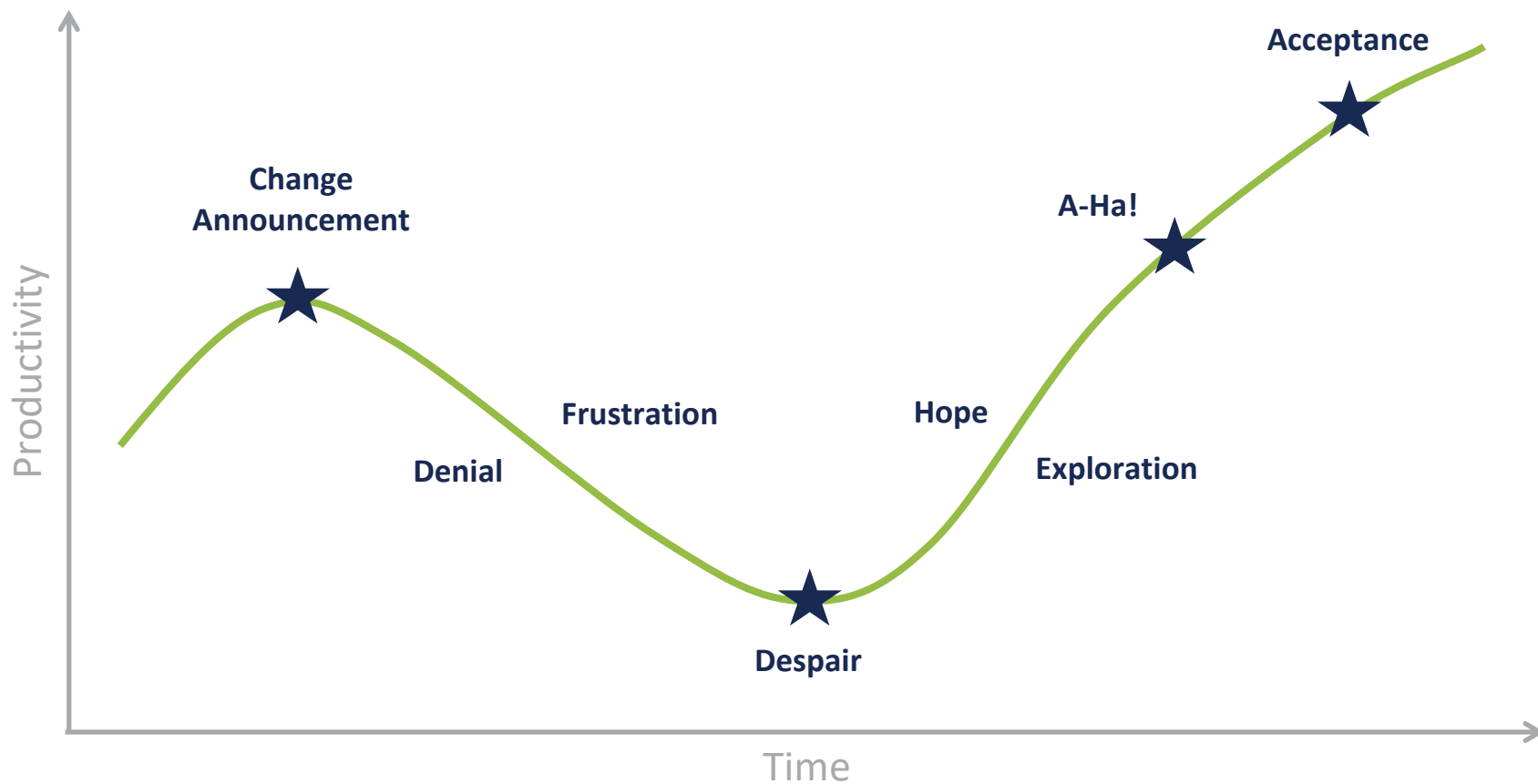
- You cannot control if/how others show empathy; you can only control how you show it.
- Always be willing to take the first steps to build the emotional connection.

### Incorporate empathy into your daily routines:

- Pause and realize that others are also under stress.
- Assume they are trying to satisfy their own needs and are not trying to make your life more difficult.
- Ask them to articulate what you can do/say to help them feel better; share with them what they could do/say to help you feel better.
- Schedule 15 min check-in meetings with different people throughout the week to keep connected.

# A CHANGE WE ALL FEEL OUR WAY THROUGH

Our own need for connection with others



# BEST PRACTICES AS A PARTICIPANT

## Before the meeting:

- Charge your headset
- Read & gather thoughts beforehand, bring informed opinions, reactions, questions
- Test equipment

## At the start of the meeting:

- Be on time; ready to fully engage
- Use headsets, not speakers
- Manage your look: appearance, background, keeping others from wandering in, camera position, lighting, audio

# BEST PRACTICES AS A PARTICIPANT

## During the meeting

- Video on; cell phone off, including texts
- No multi-tasking—show respect
- State your name when you interject
- Don't comment on everything—focus your thoughts, stay on topic, be succinct

## After the meeting:

- Read minutes and take assigned actions
- If you are late or absent, it is your responsibility to catch up
- Provide feedback on what went well, what could be better



# BEST PRACTICES FOR LEADING MEETINGS

## Plan with a purpose:

- Have a clear purpose for the meeting, e.g.:
  - Make decisions
  - Inform others
  - Solve a problem
  - Solicit input
  - Build support
- Define the appropriate target audience
- Invite the right people—more is not better

# BEST PRACTICES FOR LEADING MEETINGS

## Prepare to handle potential problems:

- Smart scheduling, e.g.:
  - Reasonable time-zones (and be specific in the invitation)
  - Check participant availability through Outlook in advance
- Charge headset; have a backup
- Test equipment; be familiar with interface
- Arrange for multiple roles to help, e.g.:
  - Time manager & note taker,
  - Engagement monitor
- Accept that things will go wrong—don't stress too much

# BEST PRACTICES FOR LEADING MEETINGS

## Create a meaningful agenda:

- Start with connection; use an icebreaker
- Create space for casual conversation and different interaction to stay connected throughout
- 45 min chunks; 8 min sprints; no more than 3 slides per sprint
- Reserve 10 min for review of objectives, notes, action items
- Send agenda out 3 days in advance

# BEST PRACTICES FOR LEADING MEETINGS

## Leading an engaging meeting:

- Start on time; end on time—be online 5 min before start; don't be late
- “No recording” is the default
- Have clear outcomes outlined at beginning
- Bring the energy by projecting enthusiasm
- Don't deliver a monologue
  - Use visuals; tell meaningful stories
  - Give others opportunity to engage—do not rush to get it done
- Call on people: involve introverts, helps everyone stay engaged
- Keep on topic; don't allow 2-3 people conversations—gently but firmly interrupt to include others or move on

# BEST PRACTICES FOR LEADING MEETINGS

## At the end of, and after, the meeting:

- Allow time to ask if they:
  - Received the information they needed,
  - Would do anything different
- Review and clarify:
  - Deliverables and next steps
  - Who is responsible for what to be done
  - When deliverables are due
  - When is the next meeting or check in
- Within 2 days, send meeting notes that people will read with a brief, concise, bullet-pointed email

# BEST PRACTICES FOR LARGE GROUPS

## Setting up the framework:

- Send a reminder email of start date/time
  - Highlight timeframes for each part of agenda
  - Schedule breaks
- Distribute pictures and bios of presenters to reinforce connection
- Review ground rules at the beginning (from Participant Best Practices checklist)
- Focus on introductions and transitions among speakers
- Assign multiple roles to help execute:
  - Greeter who is on the call 15 min in advance, welcomes, engages, makes sure all set up
  - Moderator to make sure participants are involved; monitor online chat, polls, questionnaires, queues the line for verbal questions
  - Facilitator – drives the agenda
  - Presenters – deliver content in an engaging way
- Leverage online breakout rooms for small group activities—have a monitor for each room

# BEST PRACTICES FOR LARGE GROUPS

## **Logistics:**

- Test the technology—and contingency plans
- No on-hold music from cellphone; practice disconnecting/muting people who forget
- Rehearse presenting aloud, using technology tools
- Rehearse contingency plans, including tech issues

# BEST PRACTICES FOR LONG MEETINGS

## **First impressions matter:**

- Introduce yourself—with photo
- Hook them quick—capture their attention
- Make it memorable with three key points

## **Engage your audience:**

- Know and target your audience
- Make the slides interesting
- Utilize the chat window
- Get participants talking early and often
- Provide check-ins of progress towards the targeted outcomes



# BEST PRACTICES FOR LONG MEETINGS

## During the meeting:

- Focus on introductions and transitions among speakers
- Take engagement temperature frequently—don't just ask for questions at the end, e.g.:
  - Polling
  - Collaborating
  - Sharing opinions
  - Adding updates & clarity
- Integrate real-life work situations—not just theory

## Post meeting:

- Capture attendance
- Send out a follow up survey. Did we:
  - Meet the objectives
  - Achieve level of participation
  - Manage the timeframe
  - Entice you to join a future meeting

# MOVING FORWARD



- The secret to running effective meetings virtually is very similar to running them in-person: you just need to be more intentional in creating and keeping connections amongst the participants.
- You likely have 90% of the skills you need to have good virtual meetings, and you will get better with practice.
- If your organization would like additional support in this area, please reach out to your ReSource Pro Client Representative.