



**SUCCESSING IN
A WORLD OF
VIRTUAL
MEETINGS**

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**, resulting in a new environment that requires 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



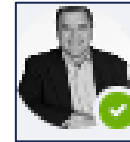
- Embrace the Change
- Best Practices as a Participant
- Best Practices as the Host
- Tips for Special Situations

CONNECTION IS A TWO-WAY STREET

Embrace the Change

If you have Instant Messaging Software (like SKYPE):

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

CONNECTION IS A TWO-WAY STREET

Embrace the Change

Empathy will make the difference

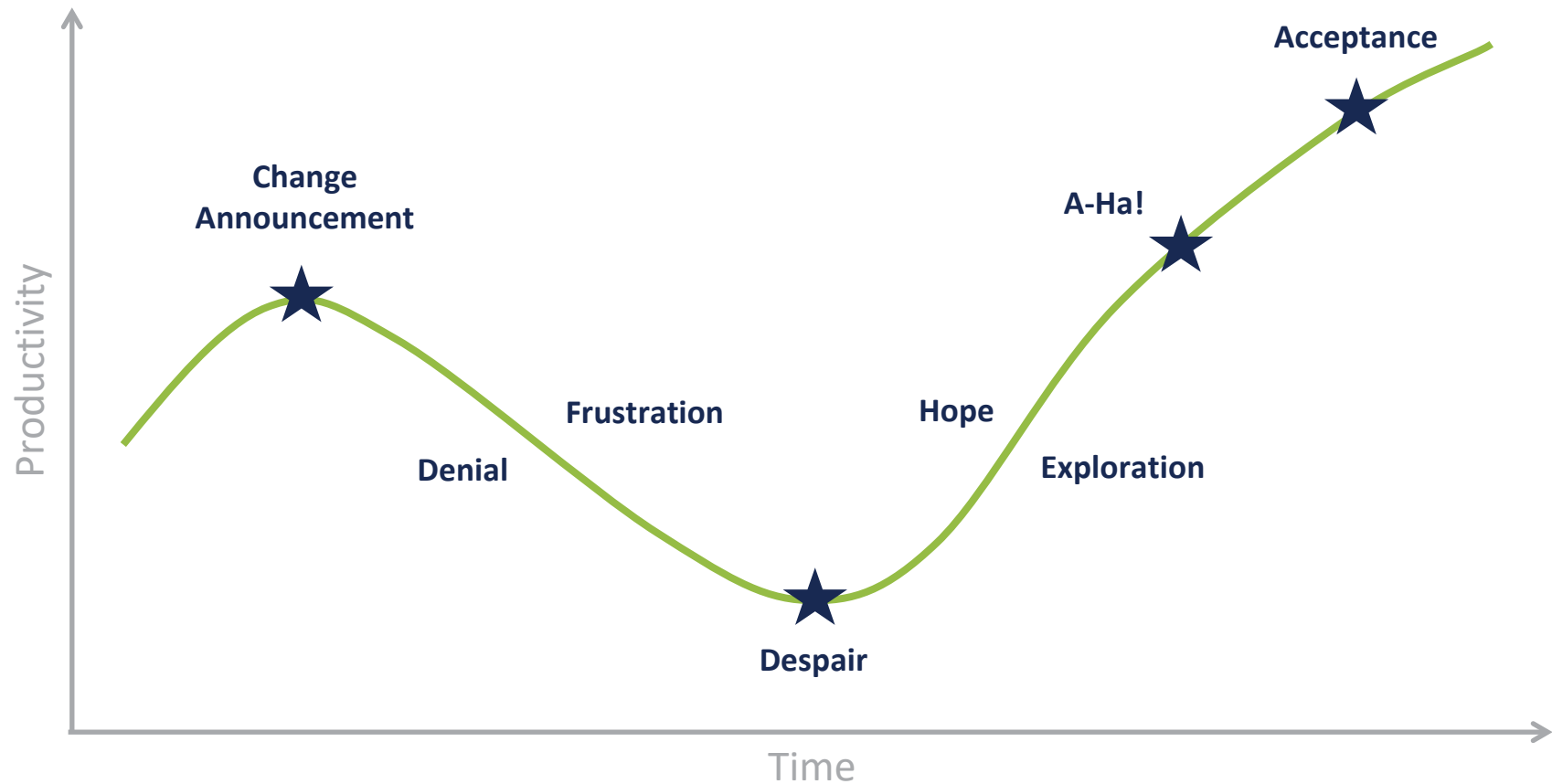
- You cannot control if/how others show empathy; you can only control how you show it
- Always be willing to take the first steps to build the emotional connection

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 just 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-point 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 amongst 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 amongst 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