

Living Dynamics - Online Learning

PRACTICAL GUIDELINES

FOR

HOSTING EFFECTIVE VIRTUAL MEETINGS



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Contents



Chapter	Page
1. “What? <u>Another</u> virtual meeting? Oh no!”	3
2. Selecting the right tool/solution for your purpose	5
3. What needs to be done <u>before</u> the virtual meeting?	8
4. How to make your meetings collaborative and effective	16
5. What needs to be done <u>after</u> the meeting?	22
6. Conclusion	24



“What? Another virtual meeting? Oh no!”

Working remotely is our current global workplace reality. It's unlikely to change in the foreseeable future. Managing teams in remote, virtual meetings, and keeping them engaged is a challenge for even the most experienced managers.

Video conferencing has long been a tool available to businesses. However, typically, managers prefer face to face meetings to remote ones, believing them to be, 'more productive'. Essentially true, but there **are** ways to adapt and improve the remote collaboration process.

So, how can managers guide and support their teams without meeting face to face? This 'eBook' will help to take the 'chaos' and negative attitude out of virtual meetings. It gives practical steps to achieve productive remote meetings by following simple guidelines, and making appropriate use of the wide range of technology now available to us.

Living Dynamics’ online eLearning programme

For best results, this eBook (which gives very useful, practical tips, but is not intended as an interactive eLearning programme) should be used in conjunction with the following, highly interactive modules which form part of Living Dynamics’ online business communication eLearning programme; “Effective Communication in the Workplace”:

- Business Intentions
- Language Use in Meetings

For more details about these modules, visit our website on: www.livingdynamics.co.za

**Pointless meetings
will cost U.S. companies a
whopping \$399 billion in 2019.
Maybe it's time to fix that.**

- Doodle's 2019 State of Meetings report -



Selecting the right solution/tool for your purpose

Productive remote meetings will only succeed if they have:

- A good connection.
- A high level of collaboration.
- An opportunity for interaction.
- Effective feedback.
- Made use of a suitable tool/solution to achieve these aims.



2.1

Questions to ask to decide which tool to use:

What do you need to achieve?



Options to consider

1. What key functionality do you need for this remote/virtual meeting?

- a) Do you need to be able to see everyone's reactions?
- b) Do you need everyone to be able to work collaboratively on a specific document?
- c) Do you need everyone to watch a presentation or demo in real time?

1. The minimum requirement is a tool that has video and audio and possibly recording functionality too.

- a) Use software with video conferencing.
- b) Try 'Google Docs'.
- c) You need software that supports screen sharing.

2. How many people need to be involved in your remote meeting?

2. Some tools are suited to one-on-one virtual chats or small groups, but not for meetings with 20 or more people from different time zones. For large groups, choose software that accommodates a large number of attendees without losing functionality.

2.2

A selection of a few available tools/solutions to explore:

Zoom

Features: Screen sharing; virtual whiteboard feature; a calendar integration feature; options to secure meetings for privacy. Zoom prioritises audio over video to make sure you're heard clearly.

Microsoft Teams

Features: Chat-based collaboration tool to share information via a common space. Features include: document collaboration; one-on-one chat; team chat; full integration with many Office 365 services, such as 'Skype', 'SharePoint' and 'Exchange'. Hub – Teams offers a shared workspace for the various applications in Microsoft Office including; 'PowerPoint', 'Word', 'Excel', 'Planner' and 'OneNote'; offers excellent security.

Slack

Features: Search; shared channels; apps and integrations; pinned items, and more. It syncs with file management tools like; 'Google Drive' and 'Dropbox Paper' to reduce back-and-forth as you access and discuss files directly in your channels. Lightning-quick navigation to various channels; 'Remind' command to remind you of meetings, deadlines etc.

Google Docs

Features: Free app; good when working collaboratively on documents in conjunction with other tools.

Skype for Business

Features: Live conferencing; smart cloud-based suite by **Microsoft – Office 365**; audio, video and web conferencing; schedule meetings in advance; easily integrated with 'Outlook' for scheduling meetings etc.; record meetings; call recording functionality is completely cloud based; virtual whiteboard.

Chapter 3



What needs to be done before the meeting?

As in any meeting, face to face or remote;

“Failing to plan is like planning to fail.”

We highly recommend the following Living Dynamics’ online modules: [“Business Intentions”](#) and [“Language Use in Meetings”](#) for an interactive training experience with many additional practical ideas for planning and facilitating all types of meetings.



3.1

Before the meeting (For the meeting host)

A) The equipment

1. Choose the most suitable tool/solution for your needs.
(See **Chapter 1** of this document).
2. Be aware of the audio, video and other functions of your chosen tool.
 - Most laptops have built in camera and audio, but consider investing in a quality webcam and a good microphone and a set of 'Airpods' if you are able to make the investment. Even a pair of wired mic-enabled headphones can go a long way to improving quality.
 - Decide where you will sit, good light on your face is important. Try sitting by a nearby window.
 - Check the quality and speed of your internet connection.
 - If you are unfamiliar with your chosen tool; practice using all the required functions BEFORE the meeting day.
 - Make sure the area behind you is quiet, uncluttered and work appropriate. Zoom, and a number of other tools, offer a '**virtual background**' feature. This is an easy way to eliminate background distractions .
 - Make sure **your attendees** have a good understanding of how to use the chosen app before the meeting day. Encourage them to attend online training for the tool, or to ask questions if they need help. Also **give** them a **point of contact** for technical needs, should they arise. This frees you up from being 'remote IT'.

B) Planning:

The agenda, timing, invitation and meeting etiquette guidelines

1. **Invite only those who need to be there.** It's easier technically with a smaller group (1-10 is a good number); then send other stakeholders a summary after the meeting. Hosting too many people at once can result in attendees speaking over each other, or conversely, allows introverts to avoid participation.
2. **Timing.** Book your meetings as far in advance as possible to avoid conflicting schedules.
 - **For 'local' meetings:** You could add an element of interest by timing the meeting around morning coffee or lunch breaks, and encouraging teams to start the meeting by sharing how their day is going, and any tips for working remotely etc.
 - **For international meetings across multiple time zones:** It can be very challenging to get everyone together across varied time zones. There are a number of tools to help you choose the right time frame for your world-wide team. For example:
 - [World Clock Meeting Plan](#) - Enter different global locations to view a timetable of corresponding working hours.
 - [Worldtimebuddy](#) - Input the team's various locations to reveal a table and 'slider' to compare practical time slots.
 - [Every Time Zone](#) - Lists major countries globally, and uses a 'slider' to see your local time compared to international times.

3. a) Plan the agenda and send to attendees

- For every virtual meeting, it's important to create, and stick to, a specific agenda to avoid time wasting.
- Send out this agenda (including the meeting's goal) to all attendees **at least 24 hours before the meeting**.
- Ask people to read the agenda, and invite comments by reply mail, if necessary, before the meeting.
- By sharing the content in advance, the team can review it and develop questions ready for the meeting. Avoid adding **new material** in real time (during the meeting).
- **The agenda sent out should include:**
 - The meeting's overall intention/goal. (What do you aim to achieve during the meeting?)
 - An itemised list of the key points for discussion.
 - The meeting structure, including; type of interaction to be used, when and for how long you plan to discuss each aspect.
 - A list of everyone who will attend the meeting.
 - What each team member is responsible for bringing/preparing to the meeting.



3. b) What to include in the invitation email to attendees

- **Attachments:** The Agenda (as previously discussed); any documents, files, or research needed for preparation.
- **What to include in the body of the email:**
 - **Restate the meeting's aim or intention, and refer to the attachments** (agenda and attachments) in the first paragraph.
 - Give clear guidelines for **how the team is expected to contribute**. I.e. Can everyone speak freely, or will the meeting host call on a person when it's their turn to contribute? Does everyone need to have their camera on at all times, or just the presenter? Should people mute their sound when others are speaking?
 - Include: **"The Rules of the Road"** for managing the virtual space. (See **pg.13 for a list** of possible options, but personalise for your situation.) These should preferably be included in the body of the email and not as an attachment, as they may not open the attachment and may miss this important information.
 - Give everyone a task/role that will keep them involved throughout the meeting. Include a list of these tasks so that everyone is aware and can prepare for their own task. (**See pg.14 for task suggestions**)
 - Remind attendees to check their equipment before the meeting and invite them to reply to your email with any thoughts or questions.
 - End the email with a positive message to the team, either general or pertaining to the meeting's goal.

3.2

“The Rules of the road”- for attendees (sample)

Rule 1

Read the agenda and prepare accordingly.

Rule 2

Don't check your phone or emails whilst others are speaking/presenting.

Rule 3

Don't interrupt others when they're speaking (or try to speak over them).

Rule 4

Test your camera/video, internet, and screen sharing etc. before the meeting.

Rule 5

Switch off all notifications and put your cell phone on silent.

Rule 6

Set yourself up in a quiet area, free from unnecessary distractions; use a 'virtual background' if necessary ('Zoom' offers these).

Rule 7

Remember common courtesy! In a virtual meeting everyone wants to be respected, heard and seen - just as in a face to face meeting.

3.3

Give everyone a task

- When attendees don't have a clear purpose for attending a virtual meeting it is almost impossible to have collaborative team engagement. People quickly lose interest if they are not involved.
- **Before the meeting decide on a task for each person** to do during the meeting. E.g. ask someone to make notes on the agenda points discussed (or allocate different points to different people). Someone else could be asked to control slide progression or use of visuals or 'Google Docs', whilst another person may be asked to make notes of all questions being asked.
- **Make sure each person is responsible for an agenda item, or knows why they are attending and what they are expected to contribute.**
- The best way to keep teams engaged during remote meetings is to allocate tasks that:
 - Make sure that **each person participates in real time**, interacting with others, and the meeting content.
 - Are **uncomplicated**. You don't want people to be so concerned with their task that they are unable to focus on participating in the meeting.
 - **Happen frequently**. Ideally, each task should need to be done over the duration of the meeting, so they remain involved throughout.
 - In summary, make your meetings collaborative and interactive by giving everyone a task that allows them to feel part of the process and success of the meeting instead of just being a passive listener, which is boring at the very least!

3.4

How to get people to know each other before the meeting

Ask yourself; **“How likely would I be to share or debate ideas freely with someone I don’t know?”**

This is one of the problems of remote online team meetings. People in offices get to know each other casually (at the photocopier, making coffee etc.), and this helps to make them feel more comfortable to contribute during face to face meetings. It is therefore the team leader/manager’s job to try to create a way for people to get to know each other a little before a remote meeting.

So what is the solution?

One way to do this, is to **set up an online informal ‘place’** for your remote workers to ‘chat’ with each other, share anecdotes, discuss progress on projects etc. or even to communicate about events and their families etc. It could even be a daily video check-in, or a weekly virtual happy hour.

It can be anything, just as long as it connects your team and allows them to get to know each other before the meeting happens. This will help to create a basis for successful virtual meetings.



How to make your meetings collaborative and effective

As the manager or host of a remote meeting it is your job to lead by example, and to create a place of safety for everyone attending, especially those who are not confident to share ideas online. If you have followed the guidelines given so far in this eBook, you will be well prepared and ready for the meeting.

The foundation has been set, as the attendees will...

- Have received and read (hopefully!) the agenda.
- Know the overall intention/aim of the meeting.
- Have had an opportunity to prepare and ask initial questions or give suggestions via email/phone calls.
- Know the ‘task’ they have been asked to do during the meeting, and have prepared for this.
- Have had the opportunity to test their equipment and chosen meeting tool.
- Know who else will be attending the meeting.
- Know the “Rules of the Road”, i.e. the ‘dos’ and ‘don’ts’ regarding timing, interaction, collaboration etc.

All of the above will save you precious time during the meeting, so now it’s time to get started with the meeting!

4.1

During the virtual meeting

A) Starting the meeting

1. Introductions

- Just as in a face to face meeting, you wouldn't start a conversation between two people who haven't met before, without introducing them. The same theory applies to virtual meetings.
- Make sure you introduce all attendees at the beginning of the meeting; include their business role, and mention the 'task' they have been given to do during the meeting. Clearly if there is an extensive list of attendees this might not be practical. If someone feels as if their role in the meeting is unimportant, they are less likely to engage with the group.
- For larger groups, the video camera may not show every speaker throughout the meeting. Some software shows an icon or picture of who is involved in the meeting, this can also be helpful. However, it is still good practice to introduce everyone initially.



2. Build rapport with a short informal chat

- Spending a few minutes ‘connecting’ with people really helps to make them feel ‘part of the room’ and meeting. Check in with everyone; catch up, tell them things that are happening in the office, rate everyone’s virtual backgrounds etc. This will really help to build the necessary rapport and set the right tone for engagement as you begin the official meeting. Not only will it boost interaction, but it can also strengthen relationships within your team.
- It is quite a useful/interesting opener to ask: “Where are you in the world?” if it is a global meeting.

3. Remind attendees to say their name before speaking

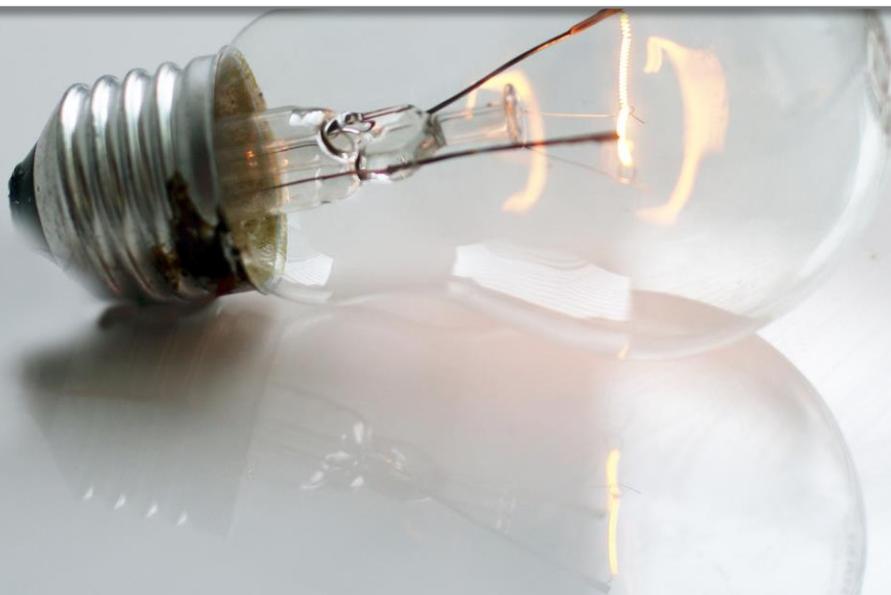
- Some people may not be visible to others, so it’s a good idea for a person to say: “Morning/Hi, it’s [Bob] here,..” as they begin to speak. This helps others to identify the speaker’s voice, and possibly to ‘put a face to a name’, if they are on video!
- If someone’s ‘task’ is to note who spoke and what they said, it will be helpful if the person has mentioned their name in this way, especially if people don’t know each other very well.

B) Maximise your 'presence' on camera

- **Go online at least five minutes before the meeting** is due to start to check that everything is functioning properly. Always have a 'Plan B' in place technically!
- 'Zoom' has a setting to manage how you start and join meetings – with video on, you can **enter a meeting 'muted'** and then 'unmute' once you are ready. This avoids people hearing personal commentary!
- **Avoid looking at yourself on the screen** while speaking, it will look as if your attention is elsewhere. **Look directly into the camera** while speaking as this gives the impression that you are looking right at each person. Place your monitor (or webcam) at eye level so you don't appear to be looking down.
- **Switch off mobile phones, and notifications from messaging apps, ringtones etc. that run on your desktop**, as these are all distracting, and is disrespectful to the other attendees.
- Some tools, such as 'Zoom', have a function where you can **stay on 'mute' throughout, and simply hold the spacebar down to 'unmute' to make a quick comment.** It helps to manage your audio and avoids 'home' noises being overheard unnecessarily!
- **Aim to be as engaging as possible!** No one enjoys sitting through boring, dry meetings, face to face or virtual. Also remember it's easier for people to 'zone out' without being noticed in a virtual meeting! You have spent much time planning every aspect of your meeting, so now ensure that you think of ways to create lively interaction, use good visuals and possibly even add a simple fun ice breaker quiz or game etc.

C) Getting going - Stick to the agenda

- After the introductions, briefly remind the attendees of the following:
 - the meeting's intention/goal;
 - the tasks that each person is responsible for during the meeting;
 - a very brief overview of the agenda and the timing of each item; and
 - perhaps remind people of the rules of interaction that were set out in the guidelines.
- Once you begin, stick to the agenda. If you are likely to have problems sticking to the agenda timing, ask one delegate to take the role/task of time keeper, to 'gently nudge' you to keep on track time wise.
- If you are using an online virtual whiteboard, you could put on a sticker with the meeting intention/goal as a visual reminder for all during the meeting.



D) Encourage engagement and participation

- **Asking directly for input really helps team members to feel engaged.** Use questions such as: “Do you think that would work?”; “Would you be happy with that?”; “What is one thing that would increase your satisfaction with this [project/situation]?”.
- **Occasionally, remind the team that everyone is expected to participate, and call on people who you haven’t heard from.** Mention their name, and repeat the question directly to them; the goal is to engage them, not ‘catch them out’!
- One way to ensure that everyone has a chance to speak is to **create a ‘round-robin-style’ discussion**, where everyone gets a set amount of time to share insight or experience about the agenda point.
- If you notice that someone on the team wants to contribute but is being ‘outdone’ by a more extrovert participant, you should **step in and, by name, invite the quiet person to speak.**
- If someone remains hesitant to speak up during the virtual meeting, take the time to schedule a one on one with them. Then you can get their views on the agenda point/s and also their insight on how they think you could make remote meetings a more inclusive space for them.
- Also, **create a communal space or document online where people can add their thoughts, insights, and suggestions following the meeting.**

E) As the host, be the last to leave

- It is generally expected that the host should be the last person to hang up at the end of the meeting. Wait until everyone else has left the meeting, allowing attendees to leave at their own pace and get any final words in before disconnecting. Not doing this is seen as rude!

What needs to be done after the meeting?

A) Leaving the meeting with a clear objective and action plan

- Every person needs to leave the meeting with clarity on exactly what they need to do, and what is to happen. This should include:
 - Clarity regarding the deliverables and specific next steps.
 - Knowledge of who is responsible for following up on each item or task.
 - When the deliverables are due and any other relevant deadlines.
 - When the next meeting or check-in will be.
- As the meeting host it is your responsibility to make sure the above happens by summarising and clarifying at the end of meeting.

B) Sending out follow up documents and checking on progress

- An **important part of the meeting follow-up is checking in with attendees** about how they felt the meeting went. This can be done through a casual one-on-one conversation or by sending out a simple and anonymous feedback survey. Hearing from attendees may help to make future meetings even more inclusive and efficient for everyone involved.
- Also **send out a simple document with a brief overview of the main points of the meeting and the action plans** to follow. You should be able to compile this using the notes taken by the person/people whose ‘task’ it was to make notes of this aspect of the meeting. This both increases the effectiveness of the meeting and reinforces the importance of remote meetings to your team members. If possible make these communications as engaging as possible, including visual images, gifs, funny pics or sayings from the meeting. Make people want to read it!
- **It’s essential in remote meetings to create very clear, specific outcome-based action plans and expectations.** Discuss these in your follow up emails to ensure that you control and follow up each item after the meeting. This is a vital step towards achieving successful remote meetings; failure to do so will override **everything** you have done throughout the planning and meeting phase! That would be counter productive and highly frustrating for everyone concerned.

Conclusion

We really hope you have found this eBook informative, and that your remote meetings will benefit from a high level of collaboration and interaction.

Living Dynamics has a comprehensive library of **19 online, eLearning communication modules with pre and post assessment tools and a personalised learning path plan**. The programmes focus on a wide range of communication skills, essential in any business environment. The modules cover written, spoken and non verbal techniques at foundational and advanced levels; and are suitable internationally for anyone, in any role, in any industry.

Unlike our eLearning programmes, this **eBook was recently designed specifically as a free theoretical guide to assist our clients** with the relatively 'new' and potentially difficult skills required to host, or attend, successful remote meetings. However, we should not neglect the critical need for our teams to communicate effectively in remote meetings as well as, face to face situations, presentations, negotiations, in reports and emails, on the telephone and in conflict situations.

Our online programmes were designed by highly experienced facilitators, and offer techniques to use for essential, everyday business skills; with immediate implementation. Modules simulate the 'look and feel' of classroom based workshops. The material introduces best practice international techniques, which are interactive, enjoyable, informative and visually appealing.

Visit our website, or send us an email to find out more, and to sample our content. www.livingdynamics.co.za email: info@livingdynamics.co.za

Please view the full list of programmes on the next page.

Chapter 6



Written Communication	Spoken Communication	Other Critical Skills
Managing the Writing Process	Fundamentals of Communication	Business Intentions
How to Write Effective Emails	Listening Skills	Language in Presentations
How to Write Effective Reports	Questioning Techniques	Language in Meetings
Writing Style and Tone	Non-Verbal Communication	Language in Negotiations
Language and Grammar - 1	Assertiveness & Behavioural Styles	Telephone Etiquette
Language and Grammar - 2	Conflict Management	
Advanced Report Writing	Emotional Intelligence	

Average time to complete each module: 40 - 50 minutes



Learners can measure their ability with the, "Rate Yourself" pre & post-course assessment tools