EFFECTIVE VIRTUAL MEETINGS

To slow the transmission of COVID-19, we are strongly encouraged to use telephone calls, Skype, Google Hangouts, or Zoom to replace in-person meetings. If you need assistance with any of these technologies, the ITS Support Center information is here. In those limited cases where this may be impractical, please follow CDC prevention guidance and social distancing recommendations of staying six feet apart from other individuals (an empty chair on both sides of individuals).

For many remote or distributed teams, virtual meetings are critical to creating organizational excellence. Virtual meetings can be as effective as in-person meetings when carefully prepared and planned for. Like in-person meetings, how effective and participative folks are is directly related to how well you prepare and deliver meeting information. While virtual meetings may not wholly duplicate the level of interaction and collaboration of in-person meetings, following these tips, find that they can still be extremely effective and productive.

BEFORE THE MEETING:
Accept that virtual meetings are different.
It is fine to acknowledge that an online meeting will not be the same as an in-person meeting. This can support the approach to meetings in a more organized manner.

Meet only when necessary.
Ask yourself honestly, do you have to meet, or are you getting people together because it is the only way to get them to review documents that can be emailed or faxed or created/edited collaboratively using Google Docs.

Involve only the people necessary.
Having people in your meetings is a luxury because their time is precious to the College and their families. Invite carefully. (Pretend you are paying for their time because, in a sense, you are.)

Plan your meeting.
- Use Google Calendar to schedule meetings so attendees don't have to search for emails
- Make sure all details about how the meeting is to be attended are clear and complete in the calendar invitation
- Schedule meetings with sufficient gaps to allow for personal needs. This minimizes late entrances and interruptions to the call or web conference

Prepare and give participants the time and materials to do the same.
If you are holding the meeting, distribute the agenda and pre-work at least 24 hours in advance, 72 hours if you need colleagues to review documents before the meeting. This allows participants time to prepare and is inclusive for all styles of engagement (e.g., introversion). If you will have rapidly changing document versions, consider using Google Docs or Sheets in order to highlight recent changes during the meeting.

Assign virtual meeting roles and require everyone be prepared.
The facilitator of the meeting does not always have to be the person who calls the meeting, although it often is. The facilitator should ask relevant questions and manage time effectively. Assign a note-taker and timekeeper for virtual meetings and consider rotating the roles among team members.

Use video technology when possible.
Video can help people feel more engaged because it allows team members to see each other's emotions and reactions, which immediately *humanizes* the room. No longer are they just voices on a phone line; they're the faces of your co-workers together, interacting.

DURING THE MEETING:
Designate a facilitator.
Once a meeting has more than a few people, it's critical to have a facilitator who can set ground rules and keep the agenda moving. This is usually someone in the meeting. For special meetings, it may be better to have someone who's not a participant so they can focus on running the meeting.

Begin with the result.
State the objectives at the onset of the meeting, so participants are aware of the desired results for this meeting. If it's your meeting, begin by stating your purpose and then stay focused on it. If you've been invited, link comments you make back to the meeting's objective.

Establish meeting (ground) agreements.
- Be on the web conference or call at the start of the meeting to minimize interruptions.
- Make sure that callers say hello and introduce themselves.
- Make it clear that not identifying yourself as being in the meeting is not acceptable. Attendees can use the chat feature of web conferencing software to announce themselves. Or interrupt as politely and quickly as possible. Facilitators should pay specific attention to tones that announce a new attendee to make space to identify themselves.

Remind attendees of meeting expectations.
- Say your name each time you speak.
- Use your mute button to eliminate background noises.
- Agree on a method to get attention such as a chat feature or "raise hand feature" and facilitator mindfulness to make space for those who haven't spoken to jump in
- Focus your comments, and keep them short.
- One conversation at a time.

Start and end on time.
No matter how many people are in the room, shut the door when the meeting is scheduled to start. Waiting for latecomers is the practical equivalent of saying to those who came on time, "Their time is more valuable than yours." Always end on time unless you have asked for permission to run over, and everyone in the room has agreed.

Leverage collaborative documents.
While many video call apps have screen sharing tools to allow anyone to share a document, this doesn't allow for collaboration. Instead, using a virtual document that everyone can access and edit at the same time to encourage conversational focus. A virtual document like Google Docs allows this to happen. And while you will need some facilitation and structure to avoid chaos, it makes for a much more collaborative meeting.

Engage the team around the virtual meeting process.
Pause halfway through the meeting to check in with participants about the meeting process. Ask them what's going well and what needs to change and incorporate this feedback into the second half of the meeting. Checking in halfway allows the facilitator to adjust before the end of the session. Engage participants again at the end of the meeting and apply this feedback to future meetings.

Ensuring everyone is treated with respect.
Facilitators should model respectful behavior to meeting participants. Help meeting participants establish specific ground rules such as "respect each other" and "listen without judgment." When a small group of people dominates the discussion or has side conversations, remind them of the shared ground rules and refocus the conversation. Ask for input from those you have not heard from.

Pay attention to visual or verbal cues.
Some software allows the facilitator to use the "gallery view" for the video meeting so they can see everyone at the same time. This way, we can all see people's reactions and non-verbal cues while we're working. A questioning look on someone's face or a hand raise can cue the facilitator to back up and make sure people are following.

Be sure to get everyone involved to maximize the entire group's input.
Make sure it is an interactive experience for everyone. This is more difficult when participants are connecting through technology. Keep track of who is actively engaged and draw silent individuals into the discussion.

Intervene immediately if you believe things are running off track.
Gently and firmly intervene if a participant is off-topic or acting out of sync with the ground rules. For example, say, "Thanks, Jean, for making that point. Let's note it for later since it's not part of today's agenda." or, "Jason, let's let Michael finish the point before responding to it. Thank you."

When you agree, move on.
Do not give in to the temptation of discussing how much you agree and sharing war stories about how right you are. When you say, "I think we're in agreement," it should be a signal to everyone that you are moving on.

Discourage the multitasking.
In a co-located meeting, there are social norms: You don't get up and walk around the room, not paying attention. Virtual meetings are no different: You don't go on mute and leave the room to get something. In a physical meeting, you would never make a phone call and "check out" from the meeting. Therefore, in a virtual meeting, you should not press mute and respond to your emails, killing any potential for lively discussion, shared laughter, and creativity.

Debrief and wrap up the meeting with action steps and commitments.
At the close of the meeting, define the next steps. Then determine who will own each and by when they can deliver. Ask team members whether they found the meeting valuable and what they want to Stop/Start/Continue. See how well the meeting matched your agenda and intended outcomes. Conclude the call by summarizing, confirming decisions, and reiterating the next steps.

AFTER THE MEETING:
Assess the effectiveness of the virtual meeting and make adjustments for next time.
Evaluate what worked and what did not before planning the next meeting. Was every participant essential? Could the issues have been handled differently? Was this precious time used to brainstorm, resolve differences, and make decisions instead of just sharing information?

Send meeting notes within 24 hours.
At a minimum, these notes should capture the action steps defined by the group, who is accountable and deadlines agreed to.

Facilitate follow-through to ensure results.
As each deadline approaches, send an email to each task's owner, reminding him of the deadline and offering help or assistance to meet it. As participants deliver on their commitments, send a note thanking them for following through and copy everyone who attended the meeting.