Getting Great Results from Virtual Meetings

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Experts Nancy Settle-Murphy and Julia Young share some trade secrets

Enforcing a strict "no mute button" rule during a tele-conference is one of the most effective ways to keep tabs on your group. If you start hearing side conversations or computer beeps, be prepared to call people on it and remind them of their commitment to participate fully. Nancy Settle-Murphy

Remote teams are a workplace reality. In a recent survey, over 75% of respondents said that they meet remotely at least twice a month. While convenient and cost effective, these virtual meetings can easily go off-track. Lacking the visual feedback of facial expressions, facilitators have little way of knowing whether participants are engaged and focused on achieving the outcomes of the meeting. We asked two experts who specialize in meeting planning and facilitation to comment on some of the tips and techniques for managing effective virtual meetings.

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Q: Let's start out with a basic question: what makes virtual meetings so challenging to facilitate?

NSM: When meeting remotely, many of the same facilitation challenges found in face-to-face meetings are heightened because you are not getting the level of feedback you would if participants were all sitting in a conference room. I'm thinking of such issues as managing expectations, figuring out when people need help, surfacing issues and resolving conflict, getting everyone to participate fully, collaborating across cultures and time zones and confirming decisions.

JY: Accurately "reading" the group is challenging in a remote setting because you can't see people's faces, body language or behavior. You don't know if they are fully engaged and participating or reading their email. Facilitators need to find new ways to check in with participants and test the temperature of the group.

Q: When is a virtual meeting appropriate (or not)? We find that the demand for virtual meetings is increasing within organizations, but not every meeting lends itself to remote participation.

NSM: It may actually be easier to identify situations where virtual meetings may not be the best solution. Any combination of these factors could be a reason not to meet remotely: when new teams are coming together for the first time and must collaborate successfully under pressure; when the group lacks trust or the issues are controversial; when the meeting outcomes will have a significant impact on people and/or the organization; when people come from different time zones and must participate at the same time for extended periods of time; and when people don't have "equal" access to technology.

You no longer need to worry about seating format and wall space. You do need to send out a detailed agenda and background material in advance and check that pre-work is completed. Pick up the phone or send regular email updates, asking for confirmation.
Julia Young

JY: Certain virtual meetings such as teleconferences are particularly appropriate for short conversations, to keep people informed and seek input from dispersed team members. With longer, more complex meetings, it becomes difficult to manage the brainstorming process and document decisions using the telephone alone. In this situation, the application of web collaboration technology can enable highly effective decision making and problem solving.

Q: What's especially important to remember when preparing for a virtual meeting?

JY: I can't emphasize enough the importance of thorough meeting planning, especially if you're meeting remotely. People typically spend 10% of their time on planning, 80% on the actual meeting, and 10% on follow-up. A better model is at least 50% planning, with 20% on the actual meeting, and 30% on follow-up. Take the time up-front to map out your agenda minute by minute, including how you intend to use technology for each activity.

NSM: The more your group understands about the meeting, the better prepared they will be to participate fully. This means sending a meeting plan that clearly spells out objectives, assumptions, roles, required pre-work and ground rules. You'll want to make sure that everyone is on the same page and on board from the very first minute.

Q: What should a facilitator do when asked to achieve the impossible? By that I mean, when the goals for the meetings are overly ambitious given the allotted time?

NSM: Consider any of the following tactics: first, try to reduce the scope of the meeting or the number of participants. Find ways to accomplish some of the meeting objectives in other ways, for example, via one-on-one phone calls or through homework assignments. If that doesn't work, walk your meeting sponsor through a detailed agenda so that it becomes clearer to him or her how long each discussion is going to take.

JY: Remember to keep virtual meetings as short as possible. It is hard to keep a remote team focused and energized for more than a couple of hours. So, if you can't get everything on your agenda accomplished in that time, look to divide it up into manageable chunks and schedule several shorter meetings. Also, focus meeting time on decision making and problem solving; you can do information sharing beforehand.

Q: What are some techniques for controlling and directing the agenda? What can you do midstream if the group seems to be getting off course?

NSM: If you feel you are going off track, refer back to the meeting objectives and/or agenda and let participants know that they/you have a few options, which include: "parking" the item that has taken you off track for handling later, skipping another agenda item, planning a follow-on meeting with some or all participants. Summarize key points frequently, tying them back to the meeting objectives. Extending meetings on the fly is usually not an option for remote meetings!

JY: It's a smart idea to discuss this with your meeting sponsor in advance of the meeting. Agree ahead of time on how digressions will be handled. During the meeting, make sure you have a way to signal your meeting sponsor (or other decision-maker) to enquire whether the digression is fruitful. If necessary, pause the discussion, let the group know that you will not meet your objectives and then take a poll on whether to continue, or table the item for another time.

Q: Give us some advice on how to check the temperature of the group. How do you deal with the presence issue, without face-to-face signals? How do you know if everyone is participating as much as they usefully can or want to?

JY: Ask them! Take a quick vote (especially useful if you have some form of meeting technology) using a scale of one to five, from (1) "I am feeling totally disengaged" to (5) "I am feeling enthusiastic and energized". Alternatively, go around the virtual "room" and ask for a one-word adjective that describes how they're feeling about the process, ideas, decisions and meeting at that time. A good rule of thumb is to check how you are doing in some way every 15 minutes.

NSM: As the facilitator, you need to be listening carefully for a drop in energy, noticeable delays in replies, half-hearted responses, and silence when conversation is called for. State what you're observing/hearing/not hearing. Validate your interpretation (whatever it may be) and if you've determined that people have become disengaged, ask your participants how the rest of the time could be used more productively. Or, make a suggestion to your meeting sponsor on the side and then let the group know how the agenda will change.

Q: What are some quick tips for keeping remote participants engaged and all on the same page?

NSM: There are lots of things you can do to encourage people to participate. Start by sticking to the agenda and objectives. Avoid presentations, and instead

Let people know that you'll need help "listening" to responses. If someone needs time to think, ask him to speak up and say so, so that you know that he is reflecting on the topic and not doing email on the side.
Nancy Settle-Murphy

use the time for exchange of ideas. Maintain your own energy, and vary your voice tone. Keep participants on their toes with the element of surprise. Use interactive meeting technology to provide focus. Keep conversations concise and quick, and ask provocative questions, using different techniques such as round robin or fill in the blank. Don't be afraid to use humor, but realize that people can't see the arch of an eyebrow or the sparkle in your eyes to indicate a joke.

JY: One useful trick is to have "plants" in the group – people who know they are going to be called on. You might tell someone before the meeting "I am going to call on you to illustrate this point with an anecdote from your experiences with such and such". I also like to remind meeting facilitators that it is their responsibility to construct an agenda that is fast-paced and interesting; in other words, remove the parts that might be tedious and deal with them in another format. Another suggestion is to encourage your participants to form small meeting pods – that is, have people who work in the same office join from a conference room, rather than dialing in from their desks.

Q: How do you get meeting participants to "behave"? In other words, how do you make sure one person isn't dominating the conversation, while another is holding back and another is interrupting?

JY: Meeting participants have responsibilities too and you need to communicate this upfront and gain agreement. The participant's role is to be prepared to be involved in the meeting and to provide open and honest input. He or she needs to be ready to speak out as well as listen to and consider the ideas of others. A guiding principle is: seek to understand before seeking to be understood. Participants should focus on why they are present and work to achieve the desired outcomes. Finally, participants must be ready to take responsibility for next steps and implementation.

NSM: One of the best ways to manage behavior is to send out ground rules in advance. The ground rules address not only logistics, but also the group dynamics and any issues you think may surface. For example, a ground rule might be that everyone will share air time and get an opportunity to speak. If someone begins to dominate the conversation, you can call them on it by thanking them for their input and stating that you would now like to hear from other participants. Or you might begin a round robin process and call on each person in turn.

JY: This is where online meeting technology can really help. By switching participation from verbal conversation to online idea generation, you make it possible for everyone to have an equal voice, while still allowing the dominant person to get everything out on the table.

Q: What should a facilitator do to ensure that participants trust the process? They might not want to give input freely without experiencing face-to-face contact.

First focus on the substance of the meeting: the objectives and desired outcomes. Agree with the meeting owner where things are now and where you want to go. Second, consider the people: who needs to be there and what they bring, group dynamics, participation and possible resistance. Then select the collaboration tools that will help you make it all happen.
Julia Young

NSM: Invoke a strict ground rule of confidentiality and make that clear in both the overview document and in going over the ground rules. Be clear about how the meeting results will be used, shared, and with whom.

JY: Know your audience. Check in with participants ahead of time, especially if you know that the process or topic is a sensitive one. Be sure to talk to critical participants without whose concurrence the meeting results will not be a success. Also, for particularly sensitive topics, consider using an electronic meeting tool for anonymous brainstorming, to get all ideas on the table.

NSM: Do everything that you do in a face-to-face meeting to establish trust. These rules still apply.

Q: A lot of technology for remote collaboration exists in the marketplace today. What tools and technology work best for virtual meetings?

NSM: The most important determinants are the level of interaction needed to achieve meeting objectives and the make-up of the participants. New teams that require close collaboration may benefit from video-conferencing, while teams that routinely work together may do very well with a telephone. Real-time data conferencing (or web conferencing) is useful when the main objectives of the meeting are either to view and discuss content in the form of a presentation or a demonstration, or to group author a work product, such as a document. And online meeting software is very useful when decision-making or brainstorming are key objectives and when some members dominate, while others are reluctant to speak.

JY: Using computer technology, especially over the web, can really help you make the most of your remote meeting time. For example, with online meeting software, brainstorming and prioritizing takes less time, and everything is documented as you go. What's critical is to let your desired outcomes, rather than the technology, drive your agenda. Choose tools that are easy to use. During the meeting, spend as little time explaining the technology as possible, rather, help people focus on the issues they have come to work on. The technology will be fun and rewarding, but people will keep asking you back if they accomplish their objectives.

Above all, be realistic about what you can achieve in the time you have. Remote meetings can take longer to achieve objectives, and few people understand the need for superb planning and pre-work.
Nancy Settle-Murphy

Read more.. Contact MoreInfo@Facilitate.com to request a free copy of 75 Tips for Getting Great Results from Virtual Meetings.