

Virtual Meetings That Work

An article by Kate Harper

For most of us virtual meetings are a business reality. We dial in to conference calls, click in to web meetings and participate in videoconferences. With the recent global economic downturn, travel is down and virtual meetings are up.

I've experienced first hand the explosive growth in collaboration and communication technology that has enabled us to change the way we work. For ten years I helped develop methodology and software to support virtual work and then coached virtual leaders and teams to be more productive. For the last eleven years I've worked virtually – I led a virtual product development organization then created a coaching company with partners across the US. I've witnessed great strides in technology, but at the same time have witnessed increasing dissatisfaction with it. There's a feeling that we've lost something and life will never be as good as it was. Virtual meetings are a case in point.

Communication is the heart of virtual work. And virtual meetings are essential to team communication. Virtual meetings can be the contractions that pump the blood that allows everything else to function. Yet, virtual meetings pose special challenges. Have you ever tried finding a time to meet with people from the West coast, East Coast, Europe and Asia? No matter what time you choose, someone will be meeting in his or her pajamas! In a virtual meeting, as well, you also don't have the advantage of reading non-verbal cues, and there isn't the chance to build relationships informally during breaks.

Perhaps this is why most managers, team leaders and participants feel that meeting virtually will never be as good as meeting face-to-face. Many secretly read their email during the meeting, text each other with side comments, and leave feeling dissatisfied.

It doesn't have to be that way. "I've experienced virtual meetings that were actually more effective than any face-to-face meeting I've been in," says Dan Kaplan, a publishing consultant from Keene NH. "It's almost like when you lose one of your senses, the others have to become more developed. We created a disciplined approach to meetings, developed a set of protocols and used tools that allow us to be more effective."

Seven tips for great virtual meetings

I've found that the challenges of virtual meetings can actually be the impetus for creating effective and satisfying meetings that are far superior to most of the face-to-face variety. Here are seven practical tips that can help you lead great virtual meetings.

1. **Level the playing field** – if one person is virtual, make everyone virtual.
2. **Make the meeting progress visible** – forget the video camera and invest in synchronous meeting technology and a technographer.
3. **Determine what's best done in vs. out of the meeting** – say goodbye to long winded status reporting in meetings!
4. **Facilitate for participation** – create a virtual conference table and poll for responses.
5. **Take time to build relationships** – plan time for non-work-related discussions.
6. **Leverage technology** – start the momentum before the actual meeting and make it continue well after.
7. **If you can, sometimes meet in person.**

Tip 1: Level the playing field

If you can't meet face-to-face, then the next best thing is to have as many people together as possible, and the rest dialing in, right?

Wrong! Dan Kaplan describes one of the worst virtual meetings he attended. "Most of the people were meeting face-to-face and a few of us called in. They all had handouts that we didn't, and were looking at a white board we couldn't see. It was as if the people on the phone were second class citizens."

If one person is attending virtually, then all should attend virtually. This is a great way to keep everyone engaged and build a sense of working together. Everyone should share the same audio and visual experience (for example, we all call in and look at the same docs or share a web conference experience). Otherwise, it's too easy for those who are on the phone to feel left out and become disengaged. It seems counter intuitive. Why not have at least some people face to face? I guarantee your meetings will improve if everyone shares the virtual experience. Try it.

Tip 2: Make the meeting progress visible

Recent advances in web conferencing technology have exploded our ability to inexpensively share graphical information in real time. This greatly enhances the effectiveness of a virtual meeting by creating a shared visual focus. With web conferencing software (e.g. [WebEx](#), [GoToMeeting](#), or Microsoft's [LiveMeeting](#)), you can share a presentation, brainstorm at a virtual whiteboard, or share any software application.

Even then, most groups are missing a key opportunity -- the use of application sharing technology to make the meeting progress visible by capturing and sharing information online during the meeting. When discussions, decisions, and action items are visibly shared, all participants have both an aural and visual sense of what is happening. It allows non-native speakers to read as well as listen, it supports group alignment by making things explicit and allowing misunderstandings to be seen, caught and fixed quickly.

One simple way to do this is to start up Microsoft Word, share the application and start taking notes. However, it does require that someone agree to capture information during the meeting. This requires a new role for virtual meetings which Bernie DeKoven, the founder of [coworking.com](#), calls the "technographer." A technographer is someone captures notes using technology so what is said is visible as the meeting takes place. Teams can become very skilled at enhancing group meetings with technography. But don't let not having a trained technographer stop you. Start by simply rotating the role around the group, and learn what works.

And what about videoconferencing or individual video cameras? In an article for the Los Angeles Times ("Conducting Virtual Meetings," Sept. 27, 2001), Lawrence J. Magid interviewed DeKoven who asserts, "Video can actually make it harder to conduct a good virtual meeting." Video is great for broadcasting speeches, but doesn't fulfill the promise 'to add personality and subtle meaning to meetings.' There are two trends that are changing this: very high end video conferencing: see NYTimes article <http://www.nytimes.com/2008/07/22/technology/22meet.html> or low end videoconferencing. Have a small team? Everyone can get free [ooVoo](#) software, plug in a video camera and meet for an on-line video conference. [Skype](#) is also great for virtual video 1-1s.

Tip 3: Determine what's best done in vs. out of the meeting

In a virtual meeting time is precious. So what you don't do in the meeting is as important as what you do. Ask yourself, what's most effectively done in real time (synchronously) and what can be better done asynchronously outside the meeting? If you've ever tried to reach a decision via email, you know that group decision making is often more effective and efficient in real time. Also celebrating and recognizing success have more impact in the group than offline.

But often, there's one thing that uses a significant amount of meeting time that's better done elsewhere: status reporting. Do status reports asynchronously beforehand. Create an agreement to identify in the report both key accomplishments and areas that need group focus to bring to the meeting. Then use the meeting to recognize successes as well as leverage the knowledge and skills of those in the room – to align goals, build on each other's ideas, and agree on action.

Best done IN the meeting	Best done OUT of the meeting
<ul style="list-style-type: none">• Group decision making• Brainstorming• Alignment• Celebrations	<ul style="list-style-type: none">• Planning• Status reports• Information gathering• Detailed editing or wordsmithing

Tip 4: Facilitate for participation

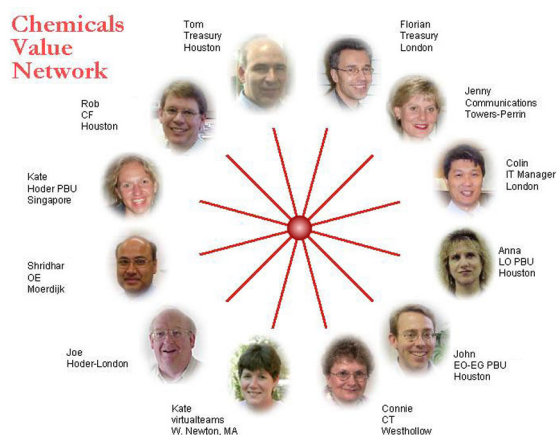
Have you ever been on a teleconference and wondered if anyone would notice if you dropped out? Have you ever heard an unfamiliar voice but didn't ask, "Who is that speaking?" Brad Power, an independent consultant and facilitator for the Star Alliance, a coalition of airlines from across the globe says, "Facilitation is key to effective virtual meetings. People from different cultures participate differently in virtual meetings, and nonnative speakers may be less inclined to speak up."

Always start a meeting by introducing everyone in the meeting, and having each person speak. Then, ask people to identify themselves every time they speak. "This is Joe in San Francisco speaking. I wanted to add..."

Create a virtual conference table

Lisa Kimball, founder of [GroupJazz](http://GroupJazz.com) and a pioneer in creating online communities, recommends creating a virtual conference table as a visual tool for sensing the entire group. At the beginning of each meeting, have attendees draw a circle on a piece of paper and put names around the clock face. Kate is at 1 o'clock, John at 2 o'clock, etc.

If you meet regularly with the same group, create a permanent version. Tom Kunz, a Global Finance Manager for Shell Chemical LP and an expert in building networks (virtual teams) at Royal Dutch



Shell created a "people wheel" for the Shell Chemicals Value Network. The wheel is a graphic with each person's picture around a circle. At each meeting the team kept the wheel visible and used it to call on individuals -- going around the "table" to make sure everyone is heard and no one is forgotten. There is something powerful about connecting with a person's picture, when you can't see them live.

Ask for responses

In a virtual meeting, it's not possible to read body language to tell who is in agrees, or who disagrees but is not talking. Perhaps someone has more to say but doesn't get a chance. However, this is an opportunity to make clear what's often incorrectly assumed during a face-to-face meeting. At key points during a discussion call on individuals and ask what they are thinking. In addition, pay attention to who has not spoken recently and solicit input from those who are quiet. For many groups there is an unspoken assumption that silence means acceptance. Don't assume. It only takes a minute to check.

Facilitate between meetings

Both Tom Kunz and Brad Power believe that great facilitation begins between meetings. "I had a personal relationship with each member," says Tom Kunz. "It allowed me to work issues with individuals and bring the right things to the meeting." Brad Power says, "By working with individuals between meetings, I had a good idea of how each person felt on the major issues, and could call on people when I knew they weren't speaking up."

Tip 5: Take time to build relationships

Virtual meetings don't allow for the same hallway conversations or break time chatting that allows us to get to know each other. Nor do they allow for the same visual clues that give us a level of comfort when working with someone we don't know. Groups that work virtually need to plan time in the meetings to build relationships.

One way to do this is to talk about topics not directly related to work but interesting to members. The Shell Chemicals Value Network - a virtual team with members in Houston, London, Singapore, the Netherlands and Boston - started meetings with a personal check-in question. An example is "Who was your favorite teacher and why?" People got to know a little more about each other and created connections without being face-to-face.

At Sun Microsystems, Margaret Schroeder's customer service strategy team consists of people from five different countries. They often start a meeting discussing what is happening in each country to learn more about each other and other cultures. "We happened to be meeting during the first reports of the Sept. 11 tragedy, and had a chance to view it from the perspective of each of the countries. It was a very moving experience."

Tip 6: Leverage technology

We tend to think of a meeting as simply as the real time interaction between participants. This is like having a TV without the TV Guide and DVR. The TV Guide enables us to plan and the DVR enables us to capture a program for later viewing, or to enjoy again. You can extend the effectiveness of your virtual meetings by sharing planning information beforehand and sharing results after the meeting.

Before the Meeting - Prepare

"The best meetings happen when people understand and share an interest in the purpose of the meeting. They also know their role: what they can offer and what they will take away. And they trust that their time will be well spent," says Tom Kunz.

Enable participants to come prepared. Before the meeting communicate the purpose, expected outcomes, required and invited attendees, and the agenda. Have any presentations or background information available in advance.

Use technology to create a persistent virtual meeting center. Create a shared space or a team wiki for posting documents, agendas and meetings notes. You can also include info about team members. If you don't have access to a shared space, use email to distribute documents in advance. But technology alone is not enough. It takes discipline to get meeting attendees to prepare. If you meet regularly with a group, one way to support the behavior is to create a specific agreement with others. Ask the group, would a preview of information be valuable? If they say yes, agree on what kinds of information should be shared. You also need to agree on how far in advance to distribute the material to allow them sufficient preparation time.

Don't hold a meeting when there is no real purpose.

Even if it's a tradition, such as a weekly project meeting, a meeting should be canceled if there is nothing that needs to be discussed, or if the required people cannot attend.

After the meeting - Capture results

Take notes during the meeting and publish the notes, a summary of actions, decisions and accomplishments. This enables those who were not able to attend to catch up, allows agreements to be followed up on and captures the context for decisions. At Shell Chemical, Tom Kunz's Value Network posted the weekly meeting notes in their on-line team room. "I found posting the notes to be invaluable to me as a leader. It enabled me to keep track of what was going on, and it built trust in the team that they would be informed whether or not they were able to attend the meeting."

Capture results in the same space as the meeting preparation with copies or links to all the material referenced in the meeting. Many web conferencing tools allow you save a recording of the meeting for later playback. Be sure to create a summary of the results, including key accomplishments, action items and decisions. It's the synthesis that makes the knowledge useful, allowing a reader to quickly get a high level overview, and decide whether or not to delve deeper.

Tip 7: Sometimes meet in person

Let's face it, there is nothing like the energy you get from being physically together with a group who is working toward a shared goal. It's hard to beat the relationships you can build over a shared meal. So, if you can, plan to occasionally meet in person. Make these special occasions, including celebration and time for non-work-related fun in addition to the hard work.

Many times it is not possible for the entire team to meet in person. Can one person travel? Leaders go visit and meet your team. Can you have a couple of folks visit a site and learn about each other's work?

Even if the whole team can never meet - occasionally plan a virtual event where the purpose is fun and celebration. Think creatively: send out packages to the sites or homes, have some virtual activities, make and post videos, have a virtual scavenger hunt pairing up people from across regions.

Conclusion

As a leader and facilitator my goal is to conduct meetings that are purposeful, results-oriented, productive and satisfying to human beings! Virtual meetings do not need to be a necessary evil. Think about the ways you can leverage the unique characteristics of a virtual team to create meetings that are as good as (or perhaps better!) than your face-to-face meetings.