10 Tips for Mastering a Virtual Meeting

By Mike Prevou

Part of the SKS Teams of Leaders Approach

Until recently, teams were simple. Each team had a single leader and meetings took place mostly face-to-face. Then, in a few short decades, new communication and web-based collaboration capabilities—combined with a sharp up-tick in the complexity of global relationships—changed all that. Now teams cross boundaries of all kind—distance, time-zone, level, function, organization, and culture. And instead of a single person being in charge, members of teams are often rotating the leadership position or working with peer leaders on cross-boundary projects where no one is appointed the leader.

Nowhere is this more evident than in government organizations. Senior leaders find themselves working in teams comprising of other leaders, each with self-interest and often a hidden agenda. Napoleonic hierarchies and cold war command-and-control models are no longer the only models available to leaders. Today's leaders join teams whose members cross organizational lines, bringing together people with vastly different expertise in search for solutions to common problems but often without a common methodology.

> These new **virtual** teams, supported by technology, work across boundaries of space, time, and organizational hierarchy. Today, *Time + Distance = 0* and team members are expected to not only be available, but participate and contribute to the team's objectives.

Today's work environments, regardless of whether they are collocated, totally virtual, or a mix, require new skills, knowledge, and attitudes that build on face-to-face experiences. At SKS, with the Teams of Leaders (ToL) initiative, we are attempting to harness and integrate the power of information technology, knowledge management processes, and advanced learning methodologies to improve collaboration as well as communication and produce high-performing teams.

We have all been in the teleconference where part of the organization is in the headquarters meeting around the conference table and the others are on the phone. In 99 out of 100 cases, the speakers talk to the people around the table and rarely acknowledge the people on the phone, let alone ensure they can hear or that the physically present members know who is on the line and why. Mastering a virtual meeting is one of the first steps towards becoming a high-performing team.

To help our clients and our own teams, we have developed "***10 Tips for Mastering a Virtual Meeting***" that, if observed, can make virtual meetings even more effective and efficient than face-to-face meetings.

1. Everyone attends the meeting in the same way, if possible.

Some believe that the most successful virtual meetings take place when everyone dials in—regardless of their location. The temptation is for those in a headquarters building to gather in the conference room and call in everyone outside their building. Resist the temptation unless the group on the phone is there simply to provide data/information rather than be part of the discussion. Having everyone participate from their own desk puts people in close proximity to their information, comfortable with their work space, and participating with the same advantages and challenges.

If you have to meet face-to-face with part of the group and the other part dial in, add a way to create a sense of presence for the remote people. If it's a regular standing team, place a photograph of the person on the table or create a slide with each team member's picture arranged around a clock face. This makes them ever present and allows us to "work our way around the table" during the discussion. If pictures are not feasible, at least make a rapid name tent out of a sheet of paper and place then between physical participants. When you call on the people dialed in to comment, intersperse with team members present in the room. This creates as much social face time as possible and extensive research indicates that dense social networks build trust and improves the work we do as a team.

If the team regularly meets online or on the phone only, use the same technique of each team member's picture arranged around a clock face using PowerPoint. Again, this allows us to always be mindful of who is in the meeting and who is not.

2. Use screen sharing with a conference call.

Use a screen sharing (web conferencing) technology such as Adobe Connect, GoToMeeting, or Skype. This is mandatory for effective sharing and creating a common view of the situation, requirement, and solutions. Otherwise, people tend to lose focus or be distracted while on the other end of the call. Establish a common web-based repository where documents can be quickly referenced and accessed before, during, and after the meetings. This virtual team room provides a common list of members, file cabinet of products, library of resources and links to supporting material, team calendar, list of tasks/milestones and responsibilities, and dashboards to manage progress. A Harvard Business Review article found that four out of five successful "far-flung teams" used the combination of conference calls, screen sharing, and an online repository or team room as their key enabling technologies.

3. Establish phone buddies.

Being a *phone buddy* is a critical skill everyone must learn. When you cannot avoid having part of the group around the conference table and the rest on the phone, a phone buddy can help keep those who are not present informed of the details. They fill in the gaps when something is happening around the table that the people on the other end of the phone would not pick up on. For example, a pause in the discussion while Mike and Jill have a sidebar conversation, or when Pete gets up to draw a picture on the whiteboard. The phone buddy simply describes what is going on. On one team of regular participants, we once observed the phone buddy texting a picture of what was being drawn on the whiteboard to the people on the phone. If the group around the table is using a slide presentation, the phone buddy might simple keep reminding the virtual members which slide is being viewed.

Additionally, the phone buddies often call those attending remotely and fill in details or stay in the room on the phone during the meeting breaks (for longer meetings) to maintain a connection with those on the line. This way, those who are not physically present continue the dialogue with those in the room. It's a small gesture to accommodate the need to continuously build relationships and keep the virtual teammate engaged.

4. Have a timed-out agenda for the meeting.

Every effective meeting has a purpose and an agenda. Without one, you waste the precious resource of real-time communication. A good agenda ensures that the meeting is for an important purpose, is scoped appropriately, and that time is allocated to each item. Have different meetings for different purposes. If you start with tactical issues and try to shift to strategic topics, the team will more than likely not be well prepared of focused on one or the other.

Peter Lencioni, in *Death by Meeting,* suggests organizations have a minimum of four different types of meetings.

- **Daily Huddle: 10 minutes – Azimuth check**
  - Reduce email and improve situational awareness.
  - Focus on today.
- **Weekly Tactical: 45-60 minutes**
  - Lightning Round, 60 seconds – what's hot in your lane:
    - Focus on weekly priorities, key meetings, and deliverables over the next 2-4 weeks.
  - Progress review, 15 minutes:
    - Metrics – how are we doing?
  - Real Time Agenda: Address specific "What's hot" topics, failures or potential failures to meet deadlines, de-confliction of priorities and resources.
    - Table strategic issues that take more than 10 minutes.
- **Monthly Strategic: Time as needed**
  - 1-2 big hairy problems.
  - Always results in a decision.
  - Some meetings planned, some ad hoc.
- **Quarterly Offsite: 1-2 days**
  - Strategic planning.
  - Multiple issues.
  - Progress toward larger objectives/priorities.

Avoid meetings that are longer than 90 minutes due to inevitable attention lag after that length of time. Publish the agenda at least a few days in advance so people can come prepared. Once the team is in sync, you can set the agenda in real-time; as trust grows, this becomes easier.

5. Take notes and post meeting minutes.

Capture the key issues, especially the decisions, of each meeting and them post those minutes to the team room website. Provide a regular way for all to review and comment or adjust what they heard in the meeting. One effective technique is to designate a minute taker, and using the agenda, add discussions and decisions. Fast is better than pretty as the longer the time span from the end of the meeting to publishing the minutes, the less likely that meeting is to be documented. Minutes should go out within the hour.

6. Rotate new roles.

In a true high-performing team, it is valuable to rotate the roles of the members, both to build depth but also to symbolize sharing responsibility. Facilitator, note-taker, and phone buddies are critical skills everyone learns. The facilitator is the person who leads the call, makes sure you follow the agenda, and encourages participation by frequent prompting and polling. Though the team leader often takes this role, many successful virtual teams rotate facilitation.

The note-taker is the person who literally takes notes during the meeting and posts them as soon as possible. This person is responsible for reporting and synthesizing the key aspects of the meeting such that anyone who couldn't attend can follow the conversation.

Keep the notes to 1-2 pages, if possible, and date them. Include the agenda. List the names of those attending and those invited who could not attend. One highly successful virtual team keeps track of Decisions, Due Outs (responsibilities with due dates), and Parking Lot issues (for discussion at a later time). Edit the notes immediately after the call when the information is still fresh. When you schedule the meeting, remember that you'll need at least another hour after the meeting to complete this task so, as note-taker, block out that time as well.

7. Begin each meeting by getting "voices in the room."

At the start of the call, project the "face clock"—where a picture of each person on the call appears at a different hour—on the screen. Using this "virtual conference table" makes facilitation easier and encourages people to announce their names each time they speak, for example, "This is Mary Jones at 3 o'clock." Reinforce this behavior at least until everyone agrees that they can recognize one another's voices.

Remember, the first time a new person joins the call; the team needs to revert to self-identification each time they speak. Pose an unexpected trust-building question (e.g., "How was your weekend? How's the weather in…") to ensure that everyone speaks at the start of or just before the official start of the meeting. Use early moments of a meeting to celebrate achievements and accomplishment, opening the session on a positive note.

8. Send read-aheads, avoid status reporting, and spend most of your time resolving conflict and making decisions.

Meetings should have one of two purposes—to keep everyone informed (situational understanding) and up-to-date and or to make decisions. Do everything you can prior to the meeting, including bringing yourself up-to-date on project status and coordinating with other teammates. Status reports are sometimes necessary but they are not the best use of same-time conference calls. It's hard to resolve differences and make complex decisions so use the precious real-time for that. Get the issues out in the open. Have managed and respectful discourse around issues but always seek to understand the other's point of view. Use the meeting to generate heat: discuss, disagree, and decide.

9. Check in and out around clock.

At the beginning of a meeting, hear everyone's voice even if it's only to ask them to check in and introduce themselves. This goes for those around the table as well as on the phone.

At the close of the meeting, make sure everyone participates in a brief check-out and highlights what they are working on for the next week or so and what they need from others in the group. This allows all to reflect on what they've done together and to say thanks and goodbye—both simple trust-building practices.

Make sure that those who are face-to-face talk into the microphone. They should talk to the people on the phone, not just those in the room.

Don't engage in any purely face-to-face team-building activities, such as a ropes course, because there is no way remote members can participate.

If the collaborative technology you are using doesn't have the capability to raise your hand to be recognized, improvise. The facilitator can ask those on the phone if anyone has questions.

Discourage audible side conversation but encourage the use of chat (if this capability is available) during meetings to identify who needs to ask a question and to keep back-channels open and allow trust-building to continue, much as it would be when people are face-to-face, nodding approval and indicating differences of opinion. We have seen the phone buddy use their cell phone to communicate directly with people on the phone to identify people who can't hear or have a question.

If sidebar conversations do occur, the phone buddy informs those online to stand by and may even provide context for the sidebar discussion. For example: "Stand by everyone on the phone, Mike and Bill are talking about changing the deadline date due to a scheduling conflict with Bill's travel schedule."

10. Check in with everyone periodically during the meeting.

One successful team uses a process whereby they stop the meeting every 15-20 minutes and call on people by name to elicit questions, comments, and concerns. Although the team reports that this technique was "rough and choppy" the first few times, with practice, it became part of the culture and worked well at keeping everyone's attention and allowing them to engage.

Make sure everyone has an opportunity to speak. If we are in the room together, we will look at each other as we work our way around table. **Do not** simply ask, "Does anyone online have anything else?" Specifically ask each person to check out using the around the clock approach.

To prevent two or more speakers from stepping on or interrupting each other, and since the people on the phone cannot see when someone is done talking, simply say "over" or "that's all" to let everyone know you are finished talking.

Conclusion

Mastering virtually meetings takes practice. After a few attempts and comfort levels improve, conduct a brief after action review to check your progress. Set aside 5-10 minutes every 5-6 meetings and ask, "How can we improve these meetings? "Are we allowing everyone's voice to be heard? Is the experience for those of you on the phone still valuable?" Take advantage of the web-based or phone applications to cut down on meeting set-up time and reduce the need for pre-coordination. Develop a meeting discipline and use tools that help you share information and connect the team. Remember, the goal of effective meetings is to improve situational understanding (the capacity to act) or to make decisions (the way in which to act). Applying these tips will help you build trust and cohesion even if you are time zones apart.