

What It Takes to Run a Great Virtual Meeting

By Bob Frisch and Cary Greene
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As companies scramble to protect employees from the spreading coronavirus with travel restrictions and remote work arrangements, there's a distinct possibility that in-person meetings with teams, customers, or suppliers may be canceled for days — or potentially weeks.

Under the best of circumstances, as soon as one or two attendees “dial in” to any meeting, productivity starts to suffer. There's a long list of reasons. Attendees often interpret virtual meetings as a license to multi-task. Meeting organizers tend to be less careful with the purpose and design of the conversation. And it's not uncommon for one or two attendees to dominate the discussion while others sit back and “tune out.”

But it doesn't have to be this way. Virtual meetings — even impromptu one's sparked by fears of a contagion — can be run more effectively, using basic meeting best practices and easy-to-use, inexpensive technology.

Here are 12 steps you can take to make that happen:

1. Use video. To make people feel like they're all at the “same” meeting, use video conferencing rather than traditional conference dial-ins. Technology — such as Zoom, Skype, and GoToMeeting — helps to personalize the conversation and to keep participants engaged.

2. That said, always provide an audio dial-in option. Video conferencing can work very well, but it relies on a strong internet connection that may not always be available. People need the ability to participate via audio, but make it clear that video-first is the new norm.

3. Test the technology ahead of time. Nothing kills momentum at the start of a meeting like a 15-minute delay because people need to download software, can't get the video to work, etc. Prior to a virtual meeting, all participants should test the technology and make sure they are comfortable with the major features. And remember, supplier or customer conversations may require your team to familiarize themselves with different software packages.

4. Make sure faces are visible. Video conferences are more effective when people can see each other's facial expressions and body language. Ask individuals to sit close to their webcam to help to recreate the intimacy of an in-person meeting.

5. Stick to meeting basics. Prior to the conversation, set clear objectives, and send a pre-read if appropriate. During the session, use an agenda, set meeting ground rules, take breaks, and clearly outline next steps (including timing and accountabilities) after each section and at the end of the meeting.

6. Minimize presentation length. The only thing worse than a long presentation in person is a long presentation during a virtual meeting. Meetings should be discussions. Background information should be provided beforehand. If someone needs to present, use screen sharing to guide the conversation, so attendees can literally "be on the same page." But prioritize conversation to maximize the time people are looking at each other.

7. Use an icebreaker. Although we're not big fans of them, it's important to use every tool to reinforce interpersonal relationships when people may be feeling isolated. Also, it's important to know if a participant may have a close friend or relative fighting the virus, so some type of "check in" is in order.

8. Assign a facilitator. It's usually harder to manage a virtual discussion than an in-person one. It can be helpful to assign one individual to guide the conversation, allowing the other participants to focus on the content. The facilitator can also use a polling system to "take the pulse" of the group on certain questions and ensure that all voices are heard. The facilitator should also be able to resolve basic questions on the technology being used.

9. Call on people. Getting everyone to participate without talking over each other is one of the more challenging aspects of running a virtual meeting. To forestall this, we recommend periodically calling on individuals to speak, even by virtually "going around the table" before a decision is finalized. Some software packages even allow attendees to "raise a hand" if they want to. This can help the facilitator drive closure without the risk of excluding an introverted participant's views.

10. Capture real-time feedback. Gathering and processing high-quality input during a virtual meeting can be challenging, especially since visual cues are harder to read. Use a phone-based survey tool like Poll Everywhere to collect on-demand feedback from attendees on specific topics in real time. Keep the polling open, separate from the videoconference to avoid disrupting the conversation. Participants will need clear instructions on how to use the system and practices, but groups get the hang of it very quickly and it's well worth the effort.

11. Don't be afraid to tackle tough issues. Meeting virtually is a learned behavior, and you'll be amazed how much you can get out of it once you and your team begin to be comfortable working this way. It may seem natural to wait to discuss tough issues until everyone is in person, but that may not be an option. So don't shy away from controversial topics.

12. Practice once or twice while you're still together. Hold your next staff meeting virtually, with each executive sitting in their office and hooking into the meeting with no assistance. After the meeting concludes, gather and debrief about the experience. What went well, and what didn't? How can you evolve your virtual meetings to make them as productive as when you meet in person?

Not being able to work together in the same room with colleagues may become a major challenge in the next few weeks. To make virtual meetings work, you might need to adjust how your team conducts them. But a small investment in preparedness now could have a huge impact if that time comes.



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