

People Biz, Inc.

KEYS TO ENGAGEMENT | LEADING VIRTUAL MEETINGS

As a leader, there is an increasing need for developing your ability to facilitate virtual meetings. We have virtual teams, travel, and a mobile workforce unlike any time in our history. There are of course special challenges that come with leading a virtual meeting.

The challenges are summarized here:

- People can't see each other, and unless there is intervention for the sake of connection, participants can feel dis-connected from others in the group.
- The feeling of disconnection can create reporting in - one way information sharing versus collaboration or consensus.
- It's easier for participants to disengage and sit quietly.
- While minutes are usually sent out afterwards there is no "parking lot" or flip chart tracking the meeting visually for participants.
- It's easy for people to "walk out" of a virtual meeting without being detected.
- If information is not sent out ahead of time, it is difficult to distribute during a meeting.

At the core of all these challenges is that engaging participants becomes even more vital than in person meetings. The most important guideline you can follow for virtual meetings is to only include those things in a meeting that require real time interaction from participants.

Use virtual meetings to develop relationships, discuss problems, jointly search for solutions, make decisions, clarify work assignments, strategize and create action plans.

- Do not use calls for reporting in! This can be done on a shared internet site or through written reporting.
- Don't use calls for notices, reading reports or routine updates.

This means the meeting facilitator will need to send out notices, updates and reports prior to the call. Give people everything they need to prepare for a lively engaging meeting.

- Create thoughtful agendas that tell people what will be discussed and objective of the meeting giving them everything they need to prepare in advance.

In addition to preparing participants for the meeting well in advance, how you start the meeting matters.

- Do a roll call and invite participants to share what they want from the meeting. This goes a long way towards creating engagement.
- Make sure you make note of what each participant wants from the call.

- Review the agenda to set the tone for the meeting and let participants know how much time is needed for segments of the meeting.
- Clarify meeting ground rules. Example ground rules can include 1) be clear and concise 2) allow the facilitator to manage who is speaking 3) ask for clarification when needed 4) stay focused and put away all other tasks 5) announce when leaving the call

During the virtual meeting

- Stop after each agenda item to bring closure and clarify outcome and what's next. Even a clear purpose can become obscure if not restated and revisited.
- Ask relevant open ended questions and allow for some time for participants to engage in the question.
- Call on people by name to get input and keep track of who is speaking and who is not.
- Encourage people to be responsible with follow through by setting a up a system for accountability to stated tasks.

At the end of meeting

- Recap summary of all agenda items. Discussions that end without closure waste everyone's time.
- Check in with each participant to see if they got what they wanted from the meeting.
- Conduct brief post meeting surveys to allow feedback on what worked and what did not.
- Share details about how minutes are shared and upcoming meetings.

And as always the basic principles of facilitation still apply

- Stay neutral
- Listen actively
- Ask questions
- Paraphrase and summarize
- Record ideas
- Stay on track
- Attack issues not people

A meeting without a facilitator is about as effective as a sports team trying to play a game without a referee!