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LOL: Virtual Meetings: 10 Tips from a virtual team

Everyone is now working virtually. Introverts don't mind so much; extraverts are praying daily for a return to normalcy ("there are no atheists in the foxholes or in quarantine...") Our team has been virtual for over a decade. (Once we had an office, but I was the Maytag repairman. Millennials: Google it.)

Here's what we've learned over that time. Meetings via Zoom, Skype, GoToMeeting, etc. must be far more organized than in person.

Guidelines include:

1. **Agenda** circulated in advance (48 hours is recommended). It should include a purpose and the desired outcomes (specific takeaways). Also, who should participate and who will facilitate. It's helpful to also designate additional roles so that participants don't become "passengers." (Typical response to conference calls: "Good, I can sort through emails...")
2. Require all participants to **turn on their webcam**. I know, harsh. Many participants are loathe to do this. Why insist? The temptation to multi-task—sort emails—is huge. Viewing one another creates accountability because participants must stay focused and engaged. It keeps you honest. And, of course, it helps with the human connection, more important now than ever.
3. **Protocol** is necessary. Designate a facilitator. Their role is to manage the conversation and stick to the agenda. In our meetings, we raise our hands when we wish to speak. (I know, "seriously? You mean, like grade school?" Yes.) This practice allows people to finish their thought and eliminates new speakers from fighting for airtime. It helps if the facilitator says, "First, Sally, then John." Also, ask the introverts—i.e. quiet ones—if they have a comment. Often, they do and just haven't said it. Invite them in. (Remember the difference between extraverted analysts and introverted ones? The extraverts look at your shoes. The introverts look at their own shoes.)
4. Remind participants up front to practice **curiosity and respect**, especially around touchy subjects. If two participants have clearly gotten defensive (FCG lingo: "below the line"), then the facilitator should intervene and say something like, "Let's all take a second to get curious again. It feels to me like we're starting to get defensive." The facilitator may want to add, "I can see both of sides of this..." Or ask, "Does anyone else have a view on this subject?" Then watch for raised hands and call on a new person. (Importantly, facilitators must ignore the urge to simply say, "John, you're being an A-hole, stop it." Unless, of course, you know John well and he IS being an a-hole.)
5. The facilitator should encourage **"headline speaking"**. This technique involves leading with the topic, then following up with details. Example: "I have a question about the budget. In the past, we've..." Not: "In the past, it's been frustrating because a group of us would get together, usually in the afternoon when we're all ready to quit for the day..." In the latter example, people are wondering, "Where is this going?" (Facilitators, resist the urge to say, "Does this train of thought have a destination?") In the former, they hear the topic and can start to collect their thoughts about it. Headline speaking takes a bit of practice but is efficient and effective once mastered.
6. Use a **real-time voting** tool like TurningPoint. (The services mentioned above have polling options included but are somewhat clunky.) The real-time voting allows participants to avoid conformity bias and deference (to the leader of facilitator). A polling question like, "Should we pursue this investment?" can be posed, and a quick poll will suggest an answer. Real-time polling has the benefit of anonymity, so



candor is safer. (Note to leaders: for a small fee, FCG can show you how to circumvent the anonymity to see how people responded. Just kidding.)

7. Use the **messaging** feature included in all the conference call services. It's very useful because side conversations aren't possible in a Zoom meeting. In an in-person meeting, you can quickly ask your neighbor, "Didn't you write a report on this topic, with some important insights?" In a virtual meeting, you can do this by messaging the participant and asking the same question, without disturbing the meeting. You can also message the facilitator with a comment like, "I think we're off topic." (We discourage participants from using it to write private messages like, "If Frank mentions that point one more time, I will mail him anthrax.")
8. Use the **screen share** option. A picture IS worth a thousand words (well, often...). Put an important image on the shared screen to help the discussion. Caution: if someone is presenting a PowerPoint deck, do NOT let them run long. We suggest 3-5 slides max, with a limit of ten minutes. Participants will moan audibly if they must sit through thirty minutes of slides.
9. At the close of the meeting, make sure you have **next steps**. We use the formula: who will do what by when? Clear agreements have always been crucial; working from home elevates them even more. (A clear agreement is not: "This has been good; somebody do something.")
10. **Evaluate** the meeting. Again, using anonymous real-time voting, have participants rate the usefulness of the meeting from 1 – 5. If some scores are low, then encourage participants to provide constructive suggestions for improvement. Messaging can be used for this feedback. Or, if anonymity is preferred, TurningPoint has a feature called, "Word Cloud" which allows participants to text in a short comment. These comments are then revealed simultaneously when the slide is advanced. (Provide useful feedback. "This sucks" is not helpful.)

These tips have helped our team at Focus Consulting significantly. Our meetings are useful, efficient, and wildly fun. Sorry, I got carried away. Seriously though, I do look forward to our virtual team meetings. And I'm an introvert!

Finally, during these challenging times we want to offer support. Many clients are working virtually or split/rotational schedule. Frequently, productivity suffers. We have prepared a video to help. Listen [here](#) or directly from our website at www.focusCgroup.com under the VIDEOS tab.

Looking down at my own shoes while remaining curious,

JW