BLAKEWORKS®

Guidance for Effective Virtual Meetings

Virtual meetings have been part of our day-to-day business for years. With these meetings now routine, it's worth considering our approach. In pre-COVID-19 days, casual daily interaction with colleagues and clients created a sense of connection. As we gather via technology, a shift in how we think about – and participate in – virtual meetings can help us stay connected, which is key to maintaining a healthy culture. In that spirit, I offer basic guidance on how to make your meetings most effective. I hope you find this helpful in this time of near-constant change.

Plan your meeting   Mirror in-person meetings as closely as possible – follow the same basic steps: set an agenda, send out pre-reads and schedule breaks if your meeting is long enough to warrant them.

Establish ground rules   Prior to the meeting, determine who will facilitate and set expectations around use of video, muting and how to make known one's desire to speak up with interruption. (see below)

Use video   Video allows us to read body language and helps keep everyone engaged. Urge participants to test their technology ahead of time, so they join the meeting on time.

Make introductions   Start your meetings with introductions to let everyone know who is in attendance. In a group where others might not recognize your voice, state your name when you speak, i.e. "This is Dana….last week we decided…" etc.

Check in   A few minutes of casual small talk at the beginning of meetings – just as in live meetings – helps maintain and strengthen everyone's sense of connection.

Avoid multitasking   This requires discipline as distractions abound. Out of respect for colleagues, bring full attention to your meetings. (A friend had to ask a person using a vacuum cleaner during a call to hit mute. *Don't be that person!*) By resisting the urge to multitask, you model positive engagement to colleagues and commitment to your organization.

Kill the mute switch   Unless you have a barking dog or a crying child – or are asked to do otherwise by your facilitator – stay present via audio and video. This also helps reduce the urge to multitask. In a recent virtual meeting, I noticed time was lost as people muted, forgot, unmuted. Your facilitator will let you know if there is static or other reason to mute.

Silence your other technology   Text notifications and ringing cell phones are distracting.

Make it a conversation   During in-person meetings, we indicate our desire to speak with eye contact or by a shift in body language. This is impossible in virtual meetings. So, establish protocol via the ground rules. Some technology offers a "raise hand" function. An effective facilitator steps in when people talk over one other and also asks those who appear hesitant for their thoughts. For some – for a variety of reasons – speaking up is difficult in any environment. Schedule one-to-one time for those who continue to resist contributing.

Be concise   When presenting, consider ahead of time how to be concise. This helps others resist multitasking and keeps them engaged. Use few slides to maximize participants' on-camera contact. In a recent virtual meeting, I found text-heavy slides distracting. In these settings, we either listen or read the slides – our brains can't do both. It's human nature to read what's in front of us – and miss what's being said. So, if using slides, keep them simple.

Be aware of your body language   The host of a recent virtual meeting was unknowingly swiveling in her chair until I asked her to please stop – or text me some Dramamine. Thankfully, she stopped.

Wrap it up   At the conclusion, be clear about next steps (deadlines, who's accountable for what).

Ask for feedback   In the last few minutes, ask what worked well and how meetings can be more effective. Also invite participants to email suggestions. During this time of change, adjust the agenda, ground rules and format as you go.