



CALCOG



FACILITATING EFFECTIVE VIRTUAL MEETINGS TIP SHEET

A mind boggling 2 billion people have been asked to stay at home to slow the spread of COVID-19. That's nearly a third of the global population that is suddenly trying to figure how to do what they do differently . . . from home.

Not surprisingly, virtual meeting platforms have emerged as a appropriately social distant solution to conduct business (even for public agencies). But online meetings come with their own set of challenges. Although many of the techniques for the making of a good in-person meeting translate to the virtual environment, online meetings come with their own special set of challenges. (For a humorous take, Google or click [A Conference Call in Real Life](#)).

Here our favorite tips for doing virtual meeting the right way.

Seven Quality Resources

Tips are borrowed heavily from these resources.

- **Julie Zhou The Looking Glass**
<https://lg.substack.com>
- **The Future of Work: The Need for Virtual Skills**
<https://insights.learnlight.com/en/articles/need-for-virtual-skills/>
- **8 Tips for More Effective Virtual Meetings**
<https://insights.learnlight.com/en/articles/8-tips-more-effective-virtual-meetings/>
- **How to Run a Great Virtual Meeting**
<https://hbr.org/2015/03/how-to-run-a-great-virtual-meeting>
- **12 Tips for Making Your Virtual Meetings More Professional**
<https://www.forbes.com/sites/josephliu/2020/03/17/virtual-meeting-tips>
- **Webcam Glam: 3 Easy Tricks to Look Polished on Video Chats**
<https://www.fastcompany.com/1819425/webcam-glam-3-easy-tricks-look-polished-video-chats>
- **How to Manage Newly-Remote Teams**
<https://www.vital-smarts.com/crucialskills/?s=manage+newly+remote+teams>

Create A Professional, Remote Space

We may be working from home and relying on video conferencing for a while, so it is worth it to set up an appropriate space with good equipment.

- Pick a quiet, carpeted room that with a neutral background wall behind you to make it easier to use background screens.
- Figure out how to create good lighting. You will be glad you did. See the Webcam Glam link for some quick [tips](#).
- Dress appropriately for the type of virtual event and the audience. Virtual business meetings and virtual happy hours are different.
- Make sure you have a comfortable chair. Use good posture during your calls, not only to look engaged and professional, but to make sure your back makes it through the pandemic.

Get the Technology Right

- Test the technology before you use it the first time. Connect 10 to 15 minutes early to identify any issues. You need a few minutes to download and install the platform and figure out how to use it.
- Make sure your webcam is at eye level. Your posture will suffer if you are using a built-in camera and hunching over so your face is in the camera. Put your laptop on a box or invest in an external camera.
- Use a good microphone. If you are doing a lot of meetings consider getting an external microphone. Nothing is worse than not being heard.
- Have alternative connection information available. Many platforms allow audio over your computer or over the phone. If connection problems make your video image jerky, you can always turn off your video feed. But if people can't understand what you are saying, you can't contribute.
- Make sure your internet connection isn't going to be saturated. Don't try to do a video conference while someone in your home is using a lot of data. Shut down other programs you don't need. Voice is sensitive to your connection speed, so if you have problems, try to use a phone for the voice connection.

Video Conference Etiquette

- Look at the camera, not the screen when talking. Make the conference window as small as possible and position it adjacent to your computer's camera. This will help you look at the person who is speaking.
- Smile or nod more vigorously when someone speaks if you're in a smaller meeting where you'll be seen on the screen. It makes a big difference to someone who otherwise feels they're presenting in an empty room.
- Create appropriate ground rules for teleconferences. Common ground rules may include:
 - *No sidebar conversations. If you are a host you can control this.*
 - *No multi-tasking (e.g., running e-mail during the telecom) Turning off notifications can help.*
 - *Participants must identify themselves when they speak.*
 - *Use of "mute" technology as per group agreement (i.e., most groups prefer that non-active speaker phones be muted to minimize extraneous noise being fed back to other locations).*
 - *Criteria for how people will be recognized to speak.*
- Think about adopting a mandatory video-on policy if appropriate. Communication is more effective when non-verbal clues are involved. Facial expressions humanize your virtual meetings and help with civility and team building.
- Exercise kindness. Everyone is processing this situation in their own way. For some of your colleagues, this period is exceedingly difficult—they're anxious, lonely, having to deal with kids, worried about family or friends, affected by a household job loss, etc. Don't assume that because they continue to work or meet with you that they're fine. Forgive some of the balls that get dropped in the name of trying our best to get through the days.

Structuring a Video Meeting

- Send out an agenda and any background information for meetings one week to three days prior to your meeting to give everyone time to prepare. Have a clear meeting structure including meetings objectives.
- Keep meetings short and to the point. It can be hard to stay focused. Keep your meetings between 15 to 45 minutes. If you can't manage the agenda within that time frame, do more preparation before the meeting or schedule several shorter meetings.
- Have everyone introduce themselves. Other ideas to consider include:
 - *Assign people different roles such as note-taker, time-keeper, “guardian” of unanswered questions, etc.*
 - *Discuss the agenda, expectations, and subject-matter preparations with participants prior to the call.*
 - *Include the dial-in number, pass-codes, and attendance list.*
 - *Inform participants about the files or website that should be open and available.*
- Cut out report-outs. Send out a simple half-page in advance to report on key agenda items – and then only spend time on these in the meeting if people need to ask questions or want to comment.
- Reward candor and honesty. Often this happens in side-bars or during informal conversations. These dynamics are harder to maintain on-line.
- Assign someone to provide commentary if some participants are calling in and others are on video. For instance, “We’re waiting a moment while Mimi gets her notes.” These verbal cues make the meeting more “real” to virtual participants and increase feelings of inclusion and openness.
- Review progress and summarize discussions as you go. These periodic reviews and summaries help keep people focused on the task at hand.
- The leader should ensure that everyone has a chance to speak. Use statements like “I’d like to hear from those who have not commented” or “There are a few folks who have not yet shared their perspective – let’s hear from you, Sandy, Jon, Jose? [Saying their names can be helpful].
- Schedule 5-10 minutes to wrap up. **Agree on next steps. Action points should be written down, tasks assigned, and deadlines agreed upon. Determine if and when to schedule another meeting.**