

Guide to virtual meetings

An article with practical tools to conduct good virtual sessions.
The tools and advices in the article can be used when facilitating
online meetings, workshops, events and training

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Introduction

Research suggests that out of the 23 hours a leader uses in meetings every week, approximately 8 of those hours are unproductive. 90% say they day-dream during meetings and 73% admit they use meetings to do other work (Steven G. Rogelberg: *The Surprising Science of Meetings: How You Can Lead Your Team to Peak Performance*, Oxford University Press, 2019). We have good reason to believe these numbers are also applicable to virtual meetings. The risk of thinking of something else or doing other work during a meeting can be greater during virtual meetings, where we are distant from body language, sounds and facial expressions.

Virtual meetings, online meetings, Teams or Zoom meetings. Whatever we call them, they all have one thing in common; they occur digitally. Virtual meetings have many advantages: they are not dependant of participants meeting physically, they are environmentally friendly, they are a timesaver since people don't physically have to transport themselves, and everyone has access to the internet via their computer and smartphone. It offers many possibilities to talk together and solve problems regardless of time and place. We believe,

however, that the potential virtual meetings offer is not optimally exploited. This, amongst other things, is related to the fact that unlike physical meetings, no good meeting-setup procedure has been developed for virtual meetings. The purpose of this article is therefore, to give concrete advice on how to conduct a good and effective virtual meeting with engaged participants.

Make it easy for participants to participate

Facilitating a meeting (physical and virtual) is about making it easy for the participants to participate. Facilitating comes from the Latin word *facilis*, which means to make easy or move freely. This means the facilitator is responsible for creating the most optimal framework for the gathered group to solve the task which is the purpose of the meeting. In other words, facilitation is about making a positive difference for the group, ensuring a clear purpose, progress, involvement and securing ownership to decisions.

These characteristics are well-known when we talk about classic meeting management and facilitation of workshops, but hardly as easy in practice in the virtual meeting. The facilitator's tasks and the classic challenges in the physical meeting are amplified in the virtual meeting. So, while it may seem timesaving and 'easier' to meet virtually, the new demand for facilitators is that the facilitation requires a new and different kind of preparation and facilitation if you want to conduct good virtual meetings.

Start by defining the purpose

When designing your meeting (virtual or physical) you must always, as a first step, ask yourself what the purpose of the meeting is, before you begin drafting the agenda.

The purpose steers what you will be working with during the meeting, who needs to participate and how you will be working.

Ask yourself, why are we having this meeting? What will it contribute? What value does the meeting create? What should we take away from it when it's over? What experience should participants have after the meeting? Only when the purpose is in place can you design the content and format of the meeting. A well-defined purpose, which is actively communicated to participants, is the prerequisite for designing and facilitating good meetings. This also makes it possible to keep discussions on track and deal with unforeseen situations along the way. There are generally four challenges in play during the virtual session (online meetings, workshops, training), all of which are about the distance created by virtual sessions and which require something different from the facilitator than in a physical session.

The 4 distances we must overcome to create engagement in a virtual setting



Physical distance

We are separated in time and space and cannot as easily decode body language.



Social distance

We do not have the same means of creating trust and intimacy before and after the meeting.



Cultural distance

We have different standards and traditions for communication.



Technological distance

Technology that fails; sound and images that do not render correctly.

Figure 1

Source: *Facilitation, create results through involvement.* Cecilie van Loon, Henrik Horn Andersen, Line Larsen. Djøf Publication, 2017

The four barriers to a good virtual meeting mean that it will be more difficult to:

- Ensure commitment
- Agree on expectations
- Respond when participants are distracted
- Know when further elaboration or introduction is needed
- Involve and engage everyone
- Address conflict and respond to it
- Decode attitudes
- Create an informal and safe environment
- Understand and respond to participants' various experiences and competencies

Maintaining participant engaged

A 2014 study from West Unified Communications Services among 500 Americans concluded that 60% of meeting participants do other work-related tasks while attending online meetings. It is easy to ‘mute’ yourself or pause the screen and begin tacking your mailbox if you don’t find relevance in what is being discussed in the virtual meeting. The facilitator’s task is to therefore, create the best possible framework to engage participants. Or to say in another way: As a facilitator your task is to make it difficult for the participants not to participate in a positive manner.

This can be done by:

- Communicating a clear purpose of the meeting and the results/decisions that we must take with us after the meeting. Everyone should know this before the meeting and must be repeated when the meeting begins.
- Involving participants along the way via check-ins and micro-involvements
- Using the chat feature or white board for input, questions and summaries
- Summarizing decisions and conclusions on an ongoing basis
- Ensuring presentations and speeches are kept short (some studies show we lose concentration after 6 minutes in online meetings)
- Making sure you have the right participants. Ask yourself if everyone needs to attend. It is easier to maintain engagement with fewer participants in virtual meetings. Can those who do not participate in the meeting be involved in another way? For example, through an orientation phone call or an email. And should everyone be present throughout the whole meeting?

Ideas for the facilitator

There are several things surrounding the virtual meeting that can be controlled before or during the meeting, as they can otherwise be disruptive along the way. These are small things that can have a big effect on the participants, as well as the facilitator's, concentration and commitment.

Physical

- Sit in a room where you are not disturbed by colleagues or other background noises. Remember that the noises you hear can be heard by others at the meeting.
- Make a recap after each agenda item
- Display the program and purpose on screen
- Establish the common space: all describe where they are sitting and what it looks like. If there are many participating in the virtual meeting, this can also be done via the chat feature, so that others can read the answers instead.
- If need be, write the minutes in the chat so everyone can follow. It would be great to delegate this task.
- Make sure all participants have their screens on and that everyone can see each other
- Place the screen further away from yourself so more of your body can be seen and hence your body language
- Think about the room you are sitting in. The room you are in helps you create the mood of the meeting: organize where you are sitting, have proper lighting, minimize background images that distract focus from yourself

Social

- If you are planning on meeting several times, we recommend you meet physically first, where you spend time agreeing on the rules of the game and establishing relationships and getting to know one another
- Use an opener to create contact and trust

- Set aside time to check-in – since last time
- Short points, short posts
- Use different tones and your arms
- Sign into the online meeting 10 minutes before so you can personally welcome participants when they log in and do some small talk
- Mention the participants who log-in by name and welcome them in person: “I can see Martin has logged into the meeting. Welcome Martin.”.

Cultural

- Find out about participants' background and experience in advance. If this is the first time you meet, set aside some time for them to present themselves.
- Go through the purpose and program and ask about expectations
- Create ground rules for the meetings and either have them approved by the participants or create them with the participants

Technical

- Be ready and online 10 minutes before the meeting begins with programs, slides, sound, etc.
- Make sure you have a good headset with microphone
- Be the technical super-user who can help and guide participants, for example, on how to mute themselves, share slides, use the white board.
- If need be, set the meeting to start 5 minutes before to ensure you can get started on time
- Convene a trial meeting, where before you begin the official meeting, all features are tested, and the meeting rules are agreed on.

Good advice for the virtual facilitator

Three things to remember in virtual sessions:

1. Involve the participants often. And remember to involve them from the beginning of the meeting e.g., through a presentation round (if you have few participants). And if you have many participants make them, write in the chat, where they indicate what they look forward to in this meeting. When we individually have been heard and seen in the beginning of a meeting, the probability that we will engage and participate increase.
2. Short 10 minutes presentations. Research shows that we already after 10 minutes presentation in a virtual setting lose concentration¹. Vary your presentation; use different presentation formats such as slides, pictures, videos. And involve through digital voting, check-ins in the chat, individual assignments, or discussions in virtual break-out rooms.
3. Take a regular 10 minutes break every hour. It is mentally challenging to stay present in online meetings and we spend a lot of energy on staying focused and decoding non-verbal signals. If you have 90 minutes meeting, then make sure to have a short bio-break after 45 minutes.

Virtual sessions need an even more structured approach.

– 3 things to remember for the virtual facilitator



Figure 2

1 How to Conduct a Virtual Meeting by Nick Morgan, HBR 2011

Good virtual facilitation

This is what you can do to create focused and engaged virtual meetings

Create focused and engaging sessions



Figure 3

Create relationships, trust, and energy in your virtual meeting

The four challenges of the virtual meeting make it extremely important for the facilitator to build trust and confidence in the meeting.

Virtual meetings can be shorter and more effective than physical meetings, which can be nice in a busy day with many meetings. However, the bonds and relationships formed between participants in a physical meeting can be beneficial when it comes to building trust and reaching common results and solutions. We therefore often use micro-involvements during virtual meetings. Micro-involvements are short exercises and tasks that are aimed at quickly creating relationships, knowledge, energy and trust among participants.

Vary your methods with micro involvement techniques

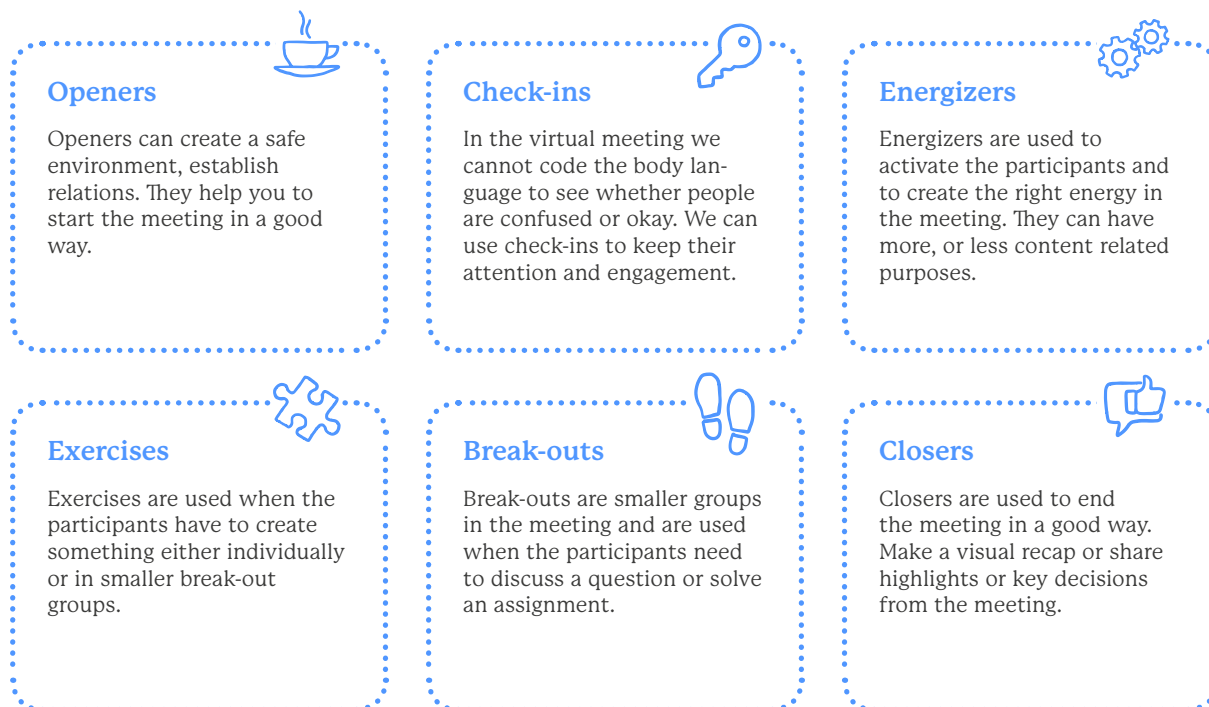


Figure 4

Inspiration for micro-involvements

Check-in: Quick-poll

Have participants chose an item on the agenda through a quick vote. Ask a relevant question regarding the purpose of the agenda item. If the purpose is to “generate ideas, solutions or actions”:

1. Create the poll (Skype, Mentimeter or other)
2. Ask participants to vote: “Which idea, solution or opportunity is the most important to tackle first?”
3. Ask about reasons

Energizer: Spell your name backwards

This exercise is good to give an energy boost to the meeting and often a good laugh.

1. Have participants spell their full name backwards
2. Split the names in the chat or a whiteboard
3. All participants read their names out loud

Exercise: “Silent brainstorm”

This exercise is good at getting inputs from all participants – including introverts and those who are reserved, as they often need to organize their thoughts before speaking.

1. Ask the group a question
2. Ask them to quietly reflect on their answer for two minutes
3. Chose who answers first

Break-out rooms: Create solutions and ownership in small groups. Break-outs are a great way to create a smaller space for a group to create solutions and generate ideas.

Set up break-out rooms before the meeting and separate participants. Keep a maximum size of five participants in each group.

1. Provide clear instructions on what the assignment is and provide a template for the solutions they need to create
2. Send participants to the break-out rooms and tell them by what time they should be back
3. Bring all participants back and facilitate a dialogue around the solutions/ideas

In both MS Teams and Zoom it is possible for the host or the co-host (goes for Zoom) or the one that has created the meeting (goes for MS Teams) to send common chat messages to the rooms and to join rooms.

Closer:

You can end the meeting in a good way by:

1. Ask participants to reflect for 2 minutes over: “What is your key take-away from this meeting?” or “What assignments have to be done after this meeting?”
2. Ask participants to share their reflections in the chat or on the whiteboard
3. If necessary, facilitate a short conversation about the reflections

Checklist for instructions

For all the above-mentioned methods the importance of clear and precise instructions is crucial.

Your instructions should include answers to:

- Why
- What
- How
- Who
- How long
- Documentation – how and who

Always make a written instruction to avoid misunderstandings.

Involvement methods for the virtual session

In the following you can find various examples of generic involvement methods and examples of digital platforms that supports involvement.

How to involve and get input:

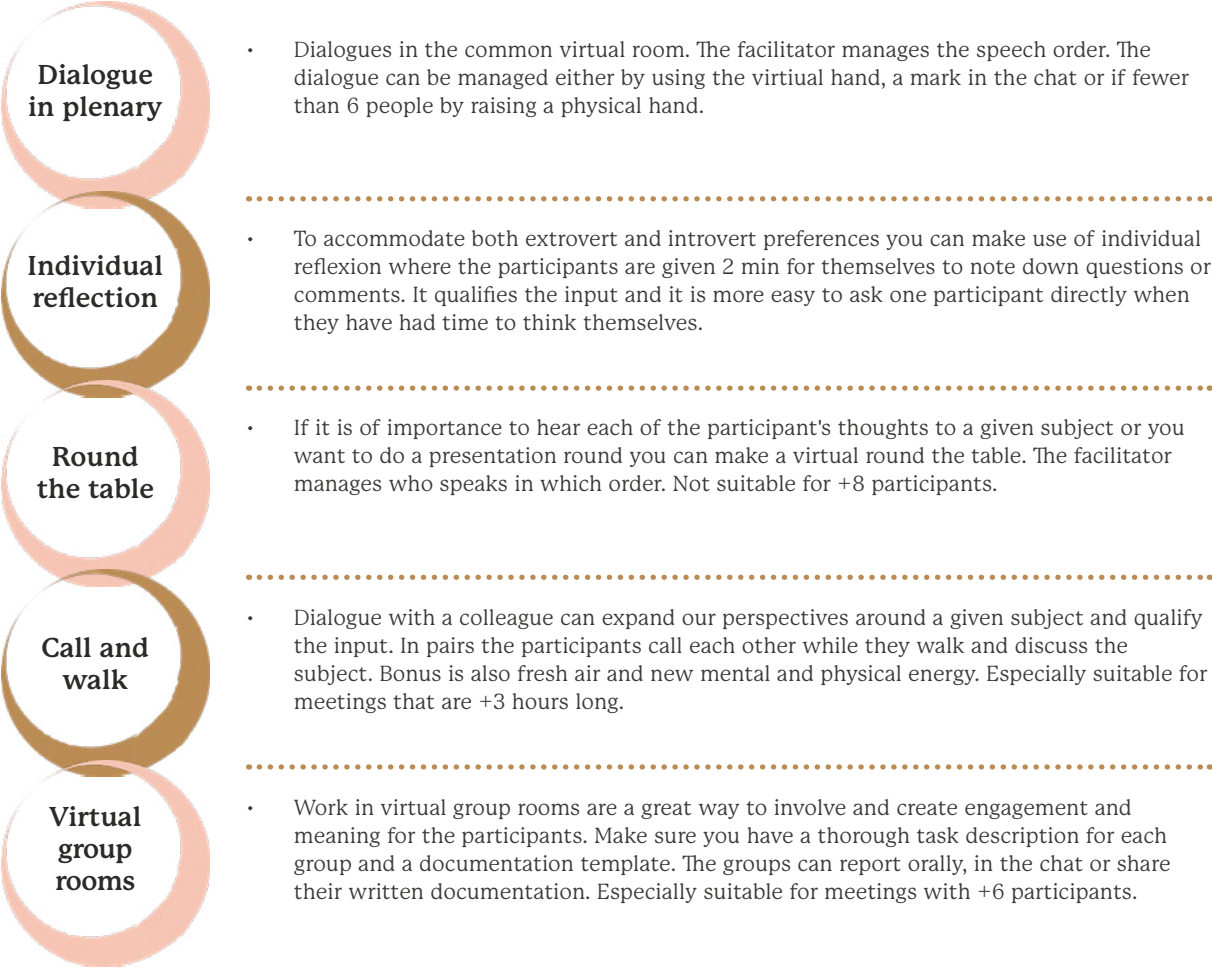


Figure 5

Digital platforms to support engagement – Whiteboards

Whiteboards are a great tool when the participants must work on something together. They are suitable for work in break-out rooms where the participants can create solutions and give written input.

Google Jamboard, Miro, and Mural whiteboards

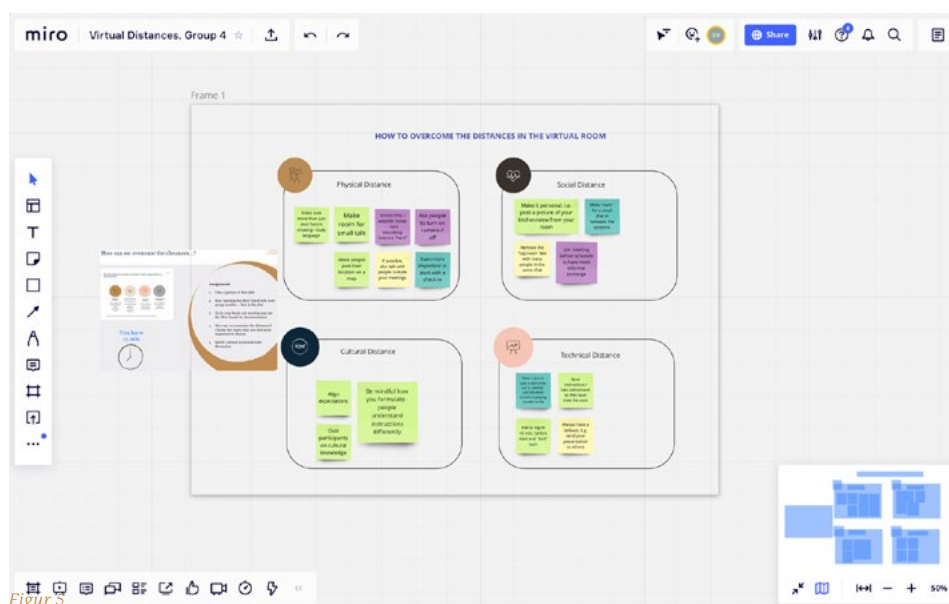
- Everyone can write in the whiteboard and put-up sticky notes simultaneously.
- Facilitator can access all open whiteboards and has the possibility to sneak peek on every group's work without entering the break-out room.
- Whiteboards such as Google Jamboard, Miro and Mural whiteboards are very user friendly. You can easily create your own templates, paste in your PowerPoints and pictures, and easily give access to your participants.

MS Teams and Zoom whiteboard

- Everyone can write in the whiteboard simultaneously.

In large meetings with more than 20 participants we recommend using whiteboards only in the break-out rooms as the boards tend to be messy with many participants.

Example of a Miro whiteboard:



Figur 5

Digital tools for involvement

Whiteboards

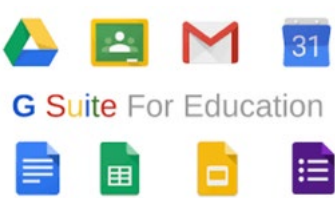


		
Google apps	Miro	Mural
Requires a Google account.	Suitable for co-creation of solutions, ideas and decisions.	Suitable for design thinking and agile workshops.
G Suite for education has a lot of possibilities, especially the Google Jamboard is a good tool to involve and co-create. It is an online whiteboard. User friendly and easy to facilitate.	Miro is an online collaborative whiteboarding platform that enables distributed teams to work efficiently together, from brainstorming with digital sticky notes to planning and managing agile workflows.	MURAL is a digital workspace for visual collaboration, where everyone can do their best work together.
Tutorials	Tutorials	Tutorials

Figure 6

Digital platforms that support engagement – Virtual polls

Use real time polls to get input from many participants. We use both Mentimeter and Slido, where you can set up both open ended questions, multiple choice, and quizzes.

Digital tools for involvement

Real-time surveys and quizzes



Mentimeter

Real-time online voting, quizzes and small surveys. Stable, user friendly and with many functions.

[Tutorials](#)



Slido

Real-time involvement of participants through Q&A, polls and quizzes. Integration with PowerPoint, Teams og Google Slides.

[Tutorials](#)

Figure 7

You are well on your way to hosting good virtual meetings if you remember the following elements:

- Understand the nature of the virtual meeting and design your meeting accordingly.
- Keep meeting participants focused by making short 10 minutes presentations followed by involvement or variation of method.
- Use the chat and white boards to involve and to get inputs and responses from participants.
- Summarize conclusions and decisions through the meeting.
- Take the time to build relationships and trust between you and the participants.
- Make sure the technique works and that you are familiar with its functions.

Good luck creating great virtual meetings. When you first get started, you will quickly find out what works for you. Start small, maybe use the chat more actively or ask everyone to keep their cameras on for the whole meeting, so that everyone can see each other. It is preferable to implement one or two new good things than to go blank on quick-polls and energizers.



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