Making the Most of Online Meetings

Meetings have been moving online via platforms like Zoom and GotoMeeting. To make the online format work effectively, facilitators need to employ some meeting best practices.

The online format is more intricate than standard meetings because of both the technology and the limited visual ques from participants. The downside of a weakly planned meeting is reduced productivity, frustrated participants, and frayed relationships. Aside from technical issues, the biggest problem is engagement.

Before the meeting

Enable people to connect to the meeting prepared.
Assign meeting roles to your team.

Email the agenda

Agenda formats can take many forms. Roger Schwartz, an organizational psychologist, presents this roadmap agenda template to help teams get results:

Topic	Time	Purpose	Leader	Preparation	Proposed Process

1. **Topic**: List topics as questions to answer.
2. **Time**: Begin your agenda by asking for buy in, what changes need to be made, if any?
3. **Purpose**: Estimating time for a topic takes some practice with your group. The amount of time can be impacted by both the number of people and the complexity of topic.
4. **Leader**: Identify whether a decision is being made on this topic or if it is a topic for discussion.
5. Identify who is leading the discussion.
6. **Preparation**: Let people know what they need to do to be prepared for this topic during the meeting.
7. **Proposed Process:** Provide a proposed process, it can be changed if the group feels there is a better process when you review changes to the agenda at the beginning of your meeting.

Turn the video on
Presiders of face-to-face meetings arrive prior to the start of meeting. Similarly, the facilitator should be the first online and welcome people as they join, making everyone feel like they are in the same room. The video aspect is important since it enables people to see each other's emotions and reactions, so invite participants to turn on their camera. Without the video on you cannot tell if dead silence is the result of someone being disengaged or because he's rolling his eyes in disagreement (or if he is even there).

If you want to get better engagement, identify different people to assume different roles on a rotating basis. Roles may include:

- **Facilitator**: Designs and Facilitates Meeting
- **Note Taker**: Takes action notes/takeaways and *emails them to everyone right after meeting*
- **Technical Support**: Helps with technical troubleshooting

- **Bridge Moderator**: Someone who can assist remote participants in a face-to-face meeting or those unable to use a video conference platform. This person can help watch for information being placed in the chat box.
- **Time Keeper**: Keeps time – especially important if specific time amounts are allotted to topics.
- **Devil's Advocate or Yoda**. Can help increase the human connection. This person is tasked with speaking to the elephant in the room, watching for 'group think' and pointing out when the ground rules are not being followed.

Start the meeting on time
Set up ground rules, rules of engagement or meeting norms before you begin your virtual meeting. Ground rules should be shared in the agenda at the top of your meeting. They reinforce helpful behaviors, thus help you improve your virtual meeting process, and should be a short list of no more than 6. The ground rules should be co-created and discussed with your team because for them to work everyone has to own them. Example ground rules: 1. Turn on your video if possible; 2. Use the mute microphone when you are not speaking to prevent background distractions; 3. Be prepared to participate; 4. Do not multitask.

Avoid technical snafus
It isn't a matter of whether technical problems will happen. Expect them to happen and have a Plan B or a way to avoid derailing the meeting because of one person's technical issue or your experimenting with a new tool that isn't working as you thought it would. Always have a plan B. For example, if your platform drops callers or is slow, be a little flexible with the agenda. If someone is supposed to share their screen and is having a technical problem, make sure people have copies of the document and at minimum, you as the meeting facilitator have copies, so you can share everything your own screen.

Always include a Virtual Icebreaker or Check-In
Start your meetings with an icebreaker an activity designed to build rapport. Icebreakers are discussion questions or activities used to help participants relax and ease people into a group meeting or learning situation. People perform better when they are comfortable with each other. Any icebreaker you do in a face-to-face meeting can also be adapted virtually. For example, you can share photos of your workspace the view outside your window or your pet.

Create a connecting process to engage participants.
Establish a method you can use to engage participants. This might include alphabetical order by first or last name or if you are using a video conference platform by order on the screen. If you are using an audio-only conference call platform, you can use a number system you assign people numbers at the top of the meeting, then use the numbers to ask for introductions and later in the meeting to call on people as part of the discussion.

Send out meeting notes
Everyone hears details differently. To ensure that the work of the group is accomplished use the meeting notes to capture decisions and detail upcoming assignments and identify who is responsible for what by when.

For such a time as this
Virtual meetings provide a tool for the challenge to socially distance ourselves. They can be more valuable than traditional face-to-face meetings. They are an inexpensive means to keep people connected and they provide an opportunity for us to do uncommonly good work in a uniquely challenging work environment. They provide us an opportunity to build engagement, trust, candor and safely go about our work as we fight the COVID 19 virus.

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