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## Empowering professionals to work differently

Virtual meeting guide

COVID-19 Response

# Shifting to virtual meetings

## Empowering professionals to work differently

COVID-19 comes with unique challenges, including the need for professionals to shift to meeting virtually, supporting business continuity while ensuring the health and well-being of our people and clients

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- This toolkit outlines leading practices and considerations for businesses when leveraging virtual meetings in an effort to empower their professionals to work differently
- On the following pages you will find tips for maximizing the effectiveness of virtual meetings, including **how to**



- Finally, essential to the success of every virtual meeting is the technology that supports it.
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# Conducting virtual meetings

## Tips for productivity and inclusivity

Virtual meetings can be effective and inclusive when they are planned and conducted with the audience and objectives in mind

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### 1. Be mindful of all attendees while scheduling meetings

- Carefully consider who you invite to the meeting—the smaller the group the greater the interaction. Are all team members required? Can some team members be kept up to date via email instead?

**Leverage the available technology features (e.g., polling or whiteboard) to maximize meeting effectiveness**

### 2. Be prepared

- Determine the best virtual tool for your meeting and designate a meeting coordinator responsible for the technology (test team and client access in advance), scheduling and distribution of materials
- When organizing meetings, be considerate of attendees from different time zones
- While it may be unavoidable to hold some calls outside of the working hours of some team members—take this into consideration and look for ways to include them while also respecting their well-being
- Ask all attendees to be courteous to their fellow attendees by connecting to the call on time

**For recurring meetings, consider rotating meeting times or offer different times for the same meeting topic to accommodate all attendees**

- For first time meetings or meetings with large audiences, test the technology and audio connectivity/quality in advance, and dial in 10 minutes early to troubleshoot last minute problems
- Make sure attendees use screen shields and headphones if their location is not private
- Send presentations or documents to attendees prior to the meeting to ensure access during the call and consider using sharing technology (such as Microsoft Teams or SharePoint) rather than emailing large attachments
- Consider what, if any, visuals may help your attendees understand the material being discussed and clearly see progress (e.g., RAG rating). If you intend to share visuals, use 12-point font size or above

**When presenting, standing up when speaking helps convey more interest and passion, even when not visible to others**

### 3. Be inclusive

- In an ideal meeting, no matter what the size, all attendees participate, contributing diverse points of view and thinking together to reach new insights—share this perspective with the group at the start of the call
- For smaller groups, dedicate time at the beginning of the call for each person to introduce themselves—if it is a new team use an ice breaker to get the call going
- To engage larger groups at the start of the call try using a poll that attendees can answer in the chat function (e.g., type into the chat where you are calling from today)
- Encourage the participation of all attendees, leveraging the varied strengths, learning styles, and business chemistry of everyone on the call:
  - Send the objective, agenda, meeting materials, and key questions in advance of the meeting, allowing everyone to process the information in their own time and come prepared
  - Invite attendees who are more inclined to reflect than to speak to share their point of view on a topic, and let them know in advance to allow them to both be prepared and participate
  - Be conscious of more extroverted team members who enjoy sharing and may dominate the call, find natural segues to include other team members in the conversation
  - Rotate note taking responsibilities to build a sense of ownership
  - Distribute the call notes, key insights, decisions and actions in a concise follow up e-mail—proactively solicit ideas that might come to mind after the meeting



**Establish ground rules that encourage interaction and engagement**

#### **4. Be interactive and present**

- For smaller groups and recurring meetings, take a personal interest in all attendees—greet each attendee as they join and allow time for them to greet each other and build rapport for the meeting
- For larger groups, open the call with the agenda, objective, expected outcomes, and interaction options
- Establish ground rules that encourage interaction and engagement:
  - Invite questions via both voice and instant message, but ask that all mute their lines when not talking to reduce background noise and interruptions
  - Incorporate slides or interactive elements such as polls or whiteboards, especially for large groups, encouraging all attendees to participate and be engaged
  - Ask attendees to speak clearly and at a reasonable pace, listen attentively, and not dominate the conversation
  - Regularly stop and check that attendees are able to hear, follow the dialogue, and make contributions

#### **5. Be collaborative**

- Ask attendees to avoid multi-tasking during the call to ensure maximum participation and respect for those who do actively participate
- Minimize the duration of the meeting and maximize the value of interacting on the call. Consider organizing multiple short meetings supplemented with off-line pre-work and post-work versus one long call
- If a lengthy call is necessary, make sure to regularly check in on energy levels and build in regular breaks to keep everyone fresh and focused on the call
- When planning your call, ensure there are opportunities built into the agenda for collaboration or input
- Leverage the Spark\* session facilitation guide for brainstorming sessions
- Encourage conversation by phrasing questions to suit the desired participation
- Embrace silence—count to ten silently before summarizing and moving on to your next topic, this may prompt team members who need more time to speak up
- Let attendees know that collaboration can, and should, continue after the call ends, being clear on the proper channels for follow up points and actions
- In a virtual environment, differences in opinions or approaches can be amplified—make a concerted effort to invite, listen, and respond to different perspectives

# Adding video to virtual meetings

## Strengthening the virtual connection

Video is the next best way to engage teams and stay connected—no matter how far apart you sit

### 1. Benefits of using video during a virtual meeting:

- Video can make it feel as if those in the meeting are in the same room—take advantage of that to create a real connection with clients and teams
- Video can help build a bond of trust and commitment to common goals for teams
- When using video, attendees are more likely to turn off distractions, focus on the discussion, and be more engaged

**Be aware of how facial expression may come across on video—neutral expressions can be read as negative**

**Look at the camera (above the center of the screen) as much as possible, both when speaking and especially when listening**

### 2. Tips for using video during virtual meetings:

- Identify the best technology to accommodate the number of attendees that will be using video, and advise all attendees to ensure a reliable internet connection
- Discuss the benefits of adding video with your client and team for your discussions and gain agreement
- Establish ground rules for the use of video as some people shy away from video due to feeling the need to be “camera ready”
- If you’re leading the meeting, initiate the call early to test the technology, check your camera settings and your environment on camera
- Consider taking a few minutes during internal team meetings to use video to “show and tell,” or get a sense of each person’s environment



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