

---

# TIPS FOR MANAGING A SUCCESSFUL VIRTUAL MEETING

By Melanie Robson and Christine Kestel, Ingenia Training

## PREPARATIONS

- Think about the method of communication: should it be a conference call? a videoconference? a meeting in a virtual meeting room?... Or is an in-person meeting necessary? Different purposes may need different types of meetings
- Decide on participants. Usually, a maximum of 12 people is appropriate for virtual meetings.
- Set a clear time frame for the meeting and remember to account for different time zones. If you are booking time in a room or a web space, include some additional time at the end for leeway.
- Send out the agenda or needed documents to all participants at least 2 days before the meeting.
- Organize the technical setting if you are the leader. If you are attending the meeting, make sure that the needed software works on your computer.

## ROLES, RULES AND MANNERS

Virtual meetings lack the visual clues of face to face meetings. They require more concentration when listening, more care when speaking, and more rules to structure them.

- Define in advance the roles for all participants: who is responsible for technical questions, note taking, facilitating, etc. and define why they are attending.
- Set up rules and follow them! Who talks when? How do you show if you agree or disagree without speaking (tools)? Are there limited speaking times? And so on...
- Mind your manners! To make a virtual meeting successful, good manners are critical.
- Avoid multitasking. First, it's impolite, and second it's unproductive (tasks will take you longer in fact!).
- Take turns. The microphone function usually takes only one voice at a time – if you talk over each other, parts of the conversation will be lost.
- As a general rule, behave the same way as in an in-person meeting where everyone can see each other. Smile, sit straight, and listen carefully. Others will feel it/ recognize it from the way you are talking. It will make a difference to the quality of the conversation and to the results! Body language may not be seen but your attitude can be heard.
- Make your point clearly but politely. There is a tendency in virtual communication to be too frank because you don't see the other's reaction.
- Limit lengthy 2-person discussions in the meeting. Schedule those for later and stick to the agenda.
- Use pauses. They give the others a chance to understand you better (they are missing the visual clues!)
- Talk at a pleasant volume, not too loudly or too softly.
- Watch your speed – speak at a good pace.
- Speak with a clear voice.
- Limit background noise (music, colleagues talking, phone ringing, traffic sounds)
- Of course: avoid chewing gum, drinking or eating while talking!

---

## KEEP THE HUMAN TOUCH

Even when the meeting is virtual, try to create a feeling of meeting in the same room with people. This approach improves the discussion and the decision making.

- Help people feel connected – make introductions.
- Make sure everyone knows why everyone else is attending the meeting.
- Arrive in the meeting space a few minutes earlier to do some small talk.

## MINIMIZE POTENTIAL TECHNICAL DIFFICULTIES...

- Arrive at the meeting early to ensure that the software and connections are working
- Test to make certain that everyone can hear each other clearly. Adjust microphones and speakers where necessary.
- Is the tool working for everyone?
- Do you know how to reach each other if technical problems emerge? (instant messages, cell phones)
- Assign a tech expert who knows the tool you are using. Try to be comfortable yourself with all the relevant features before you start the meeting.

## STRUCTURE THE MEETING

- Follow the agenda and the time line.
- Everyone should stick to her/ his role.
- Make sure that everyone is on the same page: not everyone may have read the documents or the agenda. Summarize them if necessary.
- Ensure that the purpose of the meeting is clear to everyone.
- Think of breaks. A virtual meeting needs more concentration because everyone has to follow without visual clues. No virtual meeting should be longer than 90 minutes. If you need more time, make a break!
- Make sure that all participants receive a summary and clear follow up tasks after the meeting.
- Mail the whiteboard notes and the minutes to everyone.

## SELECTED BIBLIOGRAPHY

### WEBSITES

<http://archive.infoworld.com/articles/op/xml/01/04/30/010430opbriefing.xml>

Loretta Prencipe's article goes into some detail about meeting manners. It is split into a section on rules for the meeting chair and a section for rules for the attendees. It includes a link to her article about working in virtual teams.

<http://www.business-journal.com/survival/articles/dealtech/VirtualMeetings.html>

"Turbulent Times Bring Increase in Virtual Meetings" provides a list of tips for leading a virtual meeting.

<http://www.effectivemeetings.com>

A good site to start with when looking for general information about running meetings (basic information, meeting planning, teams, presenting, productivity, and design) and for information about some tools. The meeting dictionary is helpful.

<http://www.itc.virginia.edu/netsys/videoconf/vconftips.html>

This site focuses on videoconferencing but from a broader point of view so that the tips are also useful for virtual meetings without video.

---

<http://www.kateharper.com/articles/v-meetings0.html>

Kate Harper's article offers 'seven tips for great virtual meetings', including how to leverage technology.

[http://www.microsoft.com/smallbusiness/issues/finance/business\\_travel/virtual\\_meetings\\_cut\\_travel\\_cost.s.msp](http://www.microsoft.com/smallbusiness/issues/finance/business_travel/virtual_meetings_cut_travel_cost.s.msp)

"Virtual meetings cut travel costs" provides an overview of alternatives for online meetings – videoconferencing, web conferencing, teleconferencing, and online collaboration tools.

<http://www.vista.uk.com/whatwedo/largegroups/virtualmeetings.php>

"10 Tips for Virtual Meetings which feel like the 'Real Thing'" is a detailed and sound list about running virtual meetings.

## ARTICLES

Bock, Wally (2003): *Some rules for virtual teams*. The Journal for Quality and Participation. Cincinnati. Vol.26 Iss.3.

## BOOKS

Duarte, Deborah and Tennant Snyder, Nancy (2001): *Mastering Virtual Teams*. San Francisco: Jossey-Bass.

Fisher, Kimball and Fisher, Maureen (2001): *The Distance Manager: A Hands On Guide to Managing Off-Site Employees and Virtual Teams*. New York: McGraw-Hill

Gibson, Christina B. and Cohen, Susan G. (Ed) (2003): *Virtual Teams That Work. Creating Conditions for Virtual Team Effectiveness*. San Francisco: Jossey-Bass.

Hoefling, Trina (2001): *Working Virtually. Managing People for Successful Virtual Teams and Organizations*. Virginia: Stylus Sterling.

Illegems, Viviane and Verbeke, Alain (2003): *Moving Towards the Virtual Workplace: Managerial and Societal Perspectives on Telework*. Cheltenham: Edward Elgar Pub.

Mina, Eli (2000): *The Complete Handbook of Business Meetings*. New York: American Management Association

Nickson, David and Siddons, Suzy (2004): *Remote working. Linking People and Organizations*. Boston: Elsevier.

Schwartz, R.M. (1994). *The Skilled Facilitator: Practical Wisdom for Developing Effective Groups*. San Francisco: Jossey-Bass.

## ABOUT INGENIA

Ingenia provides consulting services to organizations seeking to develop innovative and professional training and e-learning strategies and programs.

Ingenia is happy to advise on the early planning stages of organizational change, to help identify the role of training and e-learning in business performance improvement.

Please contact us at: +1 604-990-4091 or [info@ingenia-training.com](mailto:info@ingenia-training.com)