Northwest (HHS Region 10)

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Facilitate Virtual Meetings Like a Pro!

Virtual meetings are unique, we're using them more than ever, and we may use them a lot more in the future, now that they've become a new norm. Facilitating virtual meetings is a little different than facilitating face-to-face meetings, and a slightly different focus and approach will help make your virtual meetings effective, productive and enjoyable.

In this resource, we'll address the use of technology for meetings, suggest a special type of agenda particularly well suited to virtual meetings, and offer a few tips on facilitating virtual meetings.

Technology

The first requisite for hosting virtual meetings is to know your technology. Whichever online meeting platform you use, be sure to practice with your technology support team or on your own prior to the meeting, so you are familiar with the features and capabilities of the technology.

If you don't have a technology support team, enlist a tech buddy to admit late comers to the meeting, problem-solve audio and video issues participants might have, monitor the chat box, keep track of time, etc. Having a tech buddy allows the facilitator to focus on the meeting and participants.

Meeting Norms

Set norms for your virtual meetings and share those with meeting participants before or at the beginning of the meeting. Common norms might include:

Use video – Having participants turn their video on allows for a personal connection, and makes the meeting feel more like a face-to-face communication. It also encourages participants to attend to the meeting, participate in conversation, and resist multi-tasking. When participants attend to something other than the meeting, their investment and input is
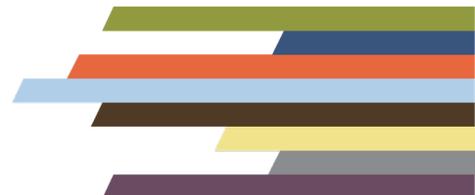
compromised, the team feels less connected and the collective creativity of the team is compromised.

Close unnecessary screens – Asking participants to close down screens they aren't using for the meeting supports participatory engagement. When the entire team is attentive to the work at hand, less time and energy is lost reattending after distraction, and more dynamic resolutions and ideas result.

Audio dial-in – Provide an audio dial-in option for those whose internet connection is not strong, but set the video option as the norm. Ask participants joining by audio to identify themselves when they speak during the meeting, so everyone knows who is saying what.

To mute or not to mute – A useful norm is to mute everyone as they join the meeting, which prevents transmitting background noise. Let participants know they are automatically muted, but that they can unmute themselves to share or respond whenever they want. Your or your tech buddy may need to watch for participants trying to speak when their microphones are muted and remind them to unmute in order to be heard.

Use platform tools – Another useful norm is the use of platform tools, such as the chat box, polling, white board, etc. as you would in a face-to-face meeting to support discussion, opinion sharing and the recording of input. Again, familiarize yourself with the purposes and uses of each tool and practice using them so you can do so smoothly to support, rather than interrupt, meeting dynamics.

Eliminate standing reports – This suggested norm might be a bit of a shock to some of you. But, standing reports are generally not terribly gripping, and people tend to tune out or multi-task during standing reports. It's hard to re-engage them and recapture their attention for important discussions, and you don't want to let everyone's best energy dissipate. Instead, provide written reports for download from your virtual meeting platform.

The Meeting Agenda

Consider using a type of agenda known as a Topic Agenda. Rather than a template listing standing items and reports, Old Business and New Business, a topic agenda focuses interest and energy on tasks that help the organization thrive. They make for much more dynamic meetings that leave participants energized for the work ahead.

Use all the great human resources gathered for virtual meetings to discuss topics that matter to the mission of the organization. Express topics in engaging terms and focus on

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those that require creative thinking, innovative approaches, new directions, emerging issues, decisions, policy or financial investment. Topic discussions unearth information and viewpoints and generate fresh ideas in response to issues, challenges and opportunities.

Facilitation Tips

Begin the meeting with a quick tech orientation, if people are new to virtual meetings or you don't know if they are – orient them to the screen, display options, chat box, and other tools you'll be using.

Do introductions if everyone does not know everyone else; specially welcome new members or guests.

Do a one-minute personal/professional check-in at the beginning of the meeting. Doing so creates the sense of community, honors what each member is bringing to the meeting, and helps create healthy, caring teams. The meeting facilitator should go first to model this communication for members to then follow; keep the sharing to one minute per person so as to be able to keep group focus and move to team work.

Whenever possible, include an opportunity for one member to share about an emerging topic of interest to the field – rotate team members to share at meetings, or ask for spontaneous sharing if your group norms are more informal; limit sharing time to 5 or 10 minutes, whatever your meeting allows. If the discussion spurs a lot of interest, include it as a topic item on your next meeting agenda.

Take breaks if the meeting will last longer than 1.5 hours. Displaying a timer using screen sharing will help member monitor break time and signal when it is time to return to the meeting. Free downloadable timers are available on the internet.

During discussions, have someone – other than the person taking the official minutes – take notes on the discussions and forward them to the minute-taker for inclusion as an addendum to the official meeting minutes

Use available tech tools, such as a white board or screen sharing, to record brainstorming, ideas, and feedback, so participants can verify accuracy and reduce duplications in ideas shared. The hand-raising option and polling, if available, can be used to take votes or weigh in on discussions.

You should also feel free to call on people to share their thoughts during virtual meetings – this is another norm you might establish up front. This ensures input from the quieter members of the team, reduces the likelihood of multi-tasking during the meeting, and allows you to call on people who may be getting "talked over."

A round-robin can also ensure you're getting everyone's ideas and is an excellent way to conclude a discussion, asking "What else haven't we thought of in our discussion of this topic?"

Ending Meeting

Often in in-person meetings, members adjourn to the water cooler to talk about the meeting. Some of the most valuable feedback about a meeting happens this way. So, set aside 5-10 minutes at the end of the meeting for a "water cooler debrief." Have each person share their thoughts and feelings about the meeting, decisions made, what could be done differently in future meetings, etc. This allows the meeting convener to know what's working and what's not, and to improve virtual meetings by hearing participants' thoughts and ideas.

Primary source: The Harvard Business Review online at How to Run a Great Virtual Meeting.