Running World Class Virtual Meetings

A critical tool in your toolbox
Why invest in remote meetings?

We conduct a lot of virtual meetings...how do we ensure they are great?

“I prepare for every web meeting with the same vigor I do in-person. It's a critical tool in the box and is used in conjunction with in-person meetings.”

~Katie Shaver, Senior PDE
Opening Exercise: Virtual vs. In person

AUDIENCE POLL

What is the same?

What approaches would you take to a meeting regardless of medium?

• Level of vigor of preparation: multiple, extensive prewires are a must; knowing all attendees, their titles, etc.
• Amount of questions you ask to pick up on how folks are feeling/tracking
• Amount of time: 60-90 minutes
• Everyone introduces themselves at the start of the meeting

What is different?

What approaches would you do differently if remote?

• Heightened comfort with running logistics
• Stating rules of engagement
• Polling/calling on each person
• Amount of pause
• Summarize more often
• Increased silence
• Location intentionality
5 Essentials for Effective Remote Meetings

**Heighten comfort with logistics**
Who is/isn't dialed in? Can everyone hear? Etc.

**State rules of engagement**
How will questions be answered? Remind everyone that one person needs to talk at a time due to slight time lags. Ask people to state their name before asking a question. Should people stay off of mute? Turn off email? Etc.

**Drive participation of every voice**
Stating names when asking questions or ensuring if people have questions and polling each person (i.e. “What did you each think about that discussion point?”)

**Press pause**
Pause: increase frequency of pulling up or pausing to check in with the group; stop to summarize what you have discussed more often; increase comfort with golden silence

**Record it**
“After the meeting I provide them with a link where they can access the recording. This is a great value add to give them. It helps to solve for “so and so wasn't here" or "I wish I could have X listen to the questions asked today." I've always been met with pleasant surprise when I share the recording and asking for permission to record the session serves as a great ice breaker to boot.”
Also Consider Location Intentionality

- **On Camera Intentionality**

  Ensure you know what is in your camera view so people on other end can focus and avoid background noise

- **Off Camera Intentionality**

  Remote colleagues might travel to your home/our office locations – timing doesn’t always work, but ask them when they are in town and try coordinating to meet face-to-face
Avoiding Technology Frustrations

To prevent loss of momentum and quality of the meeting:
- Rely on our Zoom tool for video and screen, but use your cell phone or home phone for audio (no lag in audio, only on screen)
- Do a test run – have your assistant join and ensure technology is working a few minutes in advance of the meeting; ensure screen is readable
- Still send hard mailing trip prep

Best Practice: CAMERA ON
- If you use your video, they will too ♦ Can help pick up on visual/nonverbal cues
  ♦ Reduces multi-tasking ♦ You are more engaging

- Note taking challenge: ask your assistant or a “second” to take notes
- Screen real estate: consider turning off during technology demos
- Option to set a mounted camera on top of your computer for better positioning
- Setup a small space in your home for remote meetings (flowers, nice background, etc)