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Coaching Teams . Changing Cultures

How to Run a Great Virtual Meeting

by Keith Ferrazzi March 27, 2015 – Harvard Business Review

Virtual meetings don't have to be seen as a waste of time. In fact, they can be more valuable than traditional face-to-face meetings. Beyond the fact that they're inexpensive ways to get people together – think: no travel costs and readily available technology – they're also great opportunities to build engagement, trust and candor among teams.

Several years ago, my company's Research Institute embarked on an exploration of the "New People Rules in a Virtual World" to explore how technology is shaping our relationships and how we collaborate. This multiyear journey also evolved my thinking on the subject, helping me recognize that virtual is not the enemy of the physical if key rules and processes are maintained and respected.

Going back through that research now, I've put together a comprehensive list of some simple do's and don'ts to help you get the most out of your next virtual meeting.

Before the meeting:

Turn the video on. Since everyone on the call is separated by distance, the best thing you can do to make everyone at least feel like they're in the same room is to use video. There are many options to choose from, such as WebEx and Skype. Video makes people feel more engaged because it allows team members to see each other's emotions and reactions, which immediately humanizes the room. No longer are they just voices on a phone line; they're the faces of your co-workers together, interacting. Without video, you'll never know if the dead silence in a virtual meeting is happening because somebody is not paying attention, because he's rolling his eyes in exasperation or nodding his head in agreement. Facial expressions matter.

Cut out report-outs. Too many meetings, virtual and otherwise, are reminiscent of a bunch of fifth graders reading to each other around the table – and that's a waste of the valuable time and opportunity of having people in a room together. The solution is to send out a simple half-page in advance to report on key agenda items – and then only spend time on it in the meeting if people need to ask questions or want to comment.



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This type of pre-work prepares participants to take full advantage of the meeting by thinking ahead about the content, formulating ideas or getting to know others in the group, which can help keep team members engaged, says business consultant Nancy M. Settle-Murphy in her book *Leading Effective Virtual Teams*. But one thing is critical: It has to be assumed that everyone has read the pre-read. Not doing so becomes an ethical violation against the team. I use the word “ethical” because it’s stealing time from the team — and that’s a disrespectful habit. The leader needs to set the tone aggressively that the pre-read should be done in advance.

Come prepared with the team’s opinions. Not only do you need to do your pre-reads, but once you see the agenda, make sure you discuss with your team what is going to be covered – that is, do your own due-diligence. What happens all too often is that people get on virtual calls with a point of view, but because they haven’t done any real homework before the call, they end up reversing their opinions once the call has ended and they’ve learned new information that they could have easily obtained in advance. If there’s a topic that seems to have interdependencies with people who work in our location, get their input ahead of time so you’re best representing those constituents in the meeting.

During The Meeting:

Connect people. People perform better when they are comfortable with each other, which affords a greater degree of candor and mutual interest. Your job as a leader, particularly when people may not know each other, is to make them feel connected so you can have a productive meeting. How? Do a personal-professional check-in at the beginning of each meeting. Have team members take one minute and go around to talk about what’s going on in their lives personally and professionally. Go first to model the approach for what doing it “right” looks like, in terms of tone and candor. Remind everyone to respect each other by not interrupting and to only say what they’re comfortable sharing with the group.

Encourage collaborative problem solving. A collaborative problem solving session replaces the standard “report-outs” that can weigh meetings down. It’s when the leader raises a topic for group discussion and the team works together – and sees each other as sources of advice – to unearth information and viewpoints, and to generate fresh ideas in response to business challenges.

Give each person time on the agenda. Along with collaborative problem solving, giving each person time on the agenda fosters greater collaboration and helps get input from all the team members. Here’s how it



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works: In advance of the session, have team members write up an issue they've been struggling with and bring it to the table, one at a time. Each team member then gets five minutes on the agenda to discuss his or her issue. The group then goes around the meeting so everyone gets a chance to either ask a question about it or pass. After the team member answers everyone's questions, people then get an opportunity to offer advice in the "I might suggest" format, or pass. Then, you move on to the next issue. It's a very effective use of a collaboration technique that could easily be managed in a virtual environment.

Kill mute. In a co-located meeting, there are social norms: You don't get up and walk around the room, not paying attention. Virtual meetings are no different: You don't go on mute and leave the room to get something. In a physical meeting, you would never make a phone call and "check out" from the meeting. So in a virtual meeting, you shouldn't press mute and respond to your emails, killing any potential for lively discussion, shared laughter and creativity.

As leaders, we need to establish a standard: Just because you're in a virtual meeting and it's possible to be disrespectful, it has to be understood that it's unacceptable. We're talking about civility and respect for people, so if you wouldn't do it in person, don't do it virtually.

Ban multitasking. Multitasking was once thought of as a way to get many things done at once, but it's now understood as a way to do many things poorly. As science shows us, despite the brain's remarkable complexity and power, there's a bottleneck in information processing when it tries to perform two distinct tasks at once. Not only is this bad for the brain; it's bad for the team. Managers should set a firm policy that multitasking is unacceptable, as it's important for everyone to be mentally present.

Here are three ways to make sure the ban on multitasking is followed:

- Use video: It can essentially eliminate multitasking, because your colleagues can see you.
- Have the meeting leader call on people to share their thoughts. Since no one likes to be caught off-guard, they'll be more apt to pay attention.
- Give people different tasks in the meeting, rotated regularly. To keep people engaged, have a different team member keep the minutes of the meeting; track action items, owners and deadlines; and even come up with a fun question to ask everyone at the conclusion of the meeting.



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Nick Morgan, president of consulting company Public Words Inc., recommends constant touchpoints: “In a virtual meeting, you need to stop regularly to take everyone’s temperature. And I do mean everyone. Go right around the list, asking each locale or person for input.”

Assign a Yoda. Candor is difficult even for co-located teams, but it’s the number one gauge of team productivity. To keep people engaged during virtual meetings, appoint a “Yoda.” Like the wise Jedi master in Star Wars, the Yoda keeps team members in line and makes sure everyone stays active and on topic. The Yoda keeps honesty from boiling over into disrespect by being courageous and calling out any inappropriate behaviors. At critical points during the meeting, the leader should turn to the Yoda and ask, “So, what’s going on here that nobody’s talking about?” This allows the Yoda to express the candor of the group and encourage risk-taking.

After the meeting:

Formalize the water cooler. Have you ever been in a meeting, and just when it ends, everybody walks out and vents their frustrations next to the water cooler? Make the water cooler conversation the formal ending of the virtual meeting, instead. Five to 10 minutes before the meeting ends, do what everybody would’ve done after the physical meeting – but do it in the meeting and make sure it’s transparent and conscious, processing people’s real feelings.

How? Have everyone go around and say what they would’ve done differently in the meeting. This is like the final “Yoda” moment – it’s the “speak now or forever hold your peace” moment. This is the time when you say what you disagreed with, what you’re challenged with, what you’re concerned about, what you didn’t like, etc. All of the water-cooler-type conversation happens right now, or it never happens again. And if it does happen later, you’re violating the ethics of the team.

Most importantly in virtual meetings, civility and respect must be the norm. There have to be inalienable, ethical rules that you follow before, during and after a virtual meeting for it to be truly successful. And that means adhering to two fundamental principles: Be respectful of others’ time, and be present. Failing to do so steals precious hours from the team that can never be recovered. Co-located teams have enough problems building candor and trust; teams separated by distance really need to have great meetings to build these connections.