



HeiterConnect, Inc.

MiniConnect Series: Facilitating Virtual Meetings

November 18, 2004. Presented by: Kevin Micalizzi, HeiterConnect, Inc.

Defining Facilitating Virtual Meetings

Facilitating: Providing tools to conduct meeting; one step removed from content – enabling environment; to make easy or less difficult; increased ease of performance of any action; creating a process for making things happen well and everyone participates

Virtual: Being in essence of effect; not actual, but equivalent, so far as effect is concerned; for all practical purposes

Meeting: Synchronous event; an act or process of coming together as an assembly for common purpose

Effective Meetings

We agreed that an effective meeting accomplishes goals; has specific objectives; doesn't waste our time; defines roles and responsibilities; starts and ends on time; and has all the right participants – the key decision makers. **“Virtual people do not attend virtual meetings...real people do.”**

Differences Between In-Person and Virtual Meetings

Some of the differences we highlighted between in-person and virtual meetings are: virtual meetings are not face-to-face so we lose visual cues such as facial expressions and body language; with virtual meetings it is common for people to multi-task; more difficult to confirm understanding; tougher to take needed breaks; participants have different distractions and meeting spaces; silence is more awkward; it's harder to get a “feel” for people.

Facilitator Knowledge and Skills

Basics of facilitation:

- Know how to hold people accountable to protocols
- Excellent meeting preparation and planning
- Knowing how to handle difficult participants
- How to elicit opinions from all
- Managing conflict and negative emotion
- Excellent listening skills
- Ability to clarify issues
- How to move forward to achieve objectives without stepping over important issues
- Promoting ownership and responsibilities

Reading silence:

- Is it a poorly worded question that doesn't evoke the need for a response?
- Is there inadequate information for participants to respond?
- Is there unspoken conflict?
- Is it not acceptable to voice opinion or disagree?
- Is it a lack of interest?
- Are participants paying attention?
- Is it a language or cultural issue?

Fundamentals of virtual communications:

- Know how and when to use which technology
- How to compensate for loss of visual cues
- How to get opinions and buy-in from participants

English as a second language:

- Be cognizant of word choice
- No slang or culturally specific metaphors

Understanding cross-cultural dynamics:

- Implications of different cultures on your team
- Timing and punctuality – when does an 11 am meeting really start?
- Giving dissenting opinions, particularly to the leader – is it culturally acceptable?
- What does “yes” mean? (“Yes you agree”, “Yes you heard me”, or “Yes, I think we're done with this agenda item, let's move on”.)
- How does culture impact decision-making and post decision follow through?

Choosing and using communication technology:

- Selecting and preparing technology
- Creating comfort with technology
- Understanding technology and its capabilities i.e. When to use what technologies? Is it for presentation or collaboration? Do you need a recording of the meeting?

Meeting Planning and Preparation

Virtual meetings require more preparation and planning than in-person meetings.

- Be clear about the reason for the meeting. It determines: Which technology to use; length of meeting; who should attend (and for which parts); any training or additional help needed
- Define in advance objectives and outcomes
- Know the audience
- Set and communicate agenda in advance, it determines documents to send out ahead for reference (for non-native speakers, allows them to get help translating and understanding); helps meetings go more quickly because people should be prepared
- Agree on meeting protocols and handling of critical issues
- Clarify decision-makers and influencers so that the right people are attending; to move agenda items forward more quickly; have those with relevant information and influence attend
- Clarify who will take minutes and how minutes are distributed
- Clarify who will follow up

Factors Affecting Use of Technology

Social Presence: What level of presence do you need for this meeting? A project kick-off meeting will probably require a higher level of presence. You may want to conduct in-person or via video conferencing.

Information Richness: Can the concepts be conveyed verbally? Are diagrams needed? Can visual materials be sent in advance? Does it need to be visible real-time?

During the Meeting

Running the meeting:

- ✓ Start and end on time
- ✓ Start with a “roll call” or check in
- ✓ Review protocols/ground rules
- ✓ Review agenda at start
- ✓ Keep to agenda
- ✓ Regulate “air time” for all
- ✓ Summarize and recap often

For each agenda item:

- ✓ Clarify expectations for item
- ✓ Communicate role in issue
- ✓ Communicate relevant information
- ✓ Ask for each person’s input
- ✓ Discuss implications at each site
- ✓ Ask: what don’t we know?
- ✓ Poll each person
- ✓ Decide who will own it
- ✓ Clarify communication to others

Virtual Meeting Protocols

Meeting protocols help your meeting run smoother and ensure behaviors that would be implied for an in-person meeting are made explicit in your virtual meeting. Some protocols you may want to consider are:

- Come prepared
- Pay attention
- Voice opinion, but allow others to do same
- Electronics on inaudible
- Eliminate background noise
- Say name before speaking
- Be as precise and succinct as possible
- Avoid “hold” in case of music
- Allow for pauses/silence
- No multi-tasking
- Instant Messenger ok/not ok for ...

Facilitation Tips

- ✓ Use attendee’s names frequently
- ✓ Ask lots of questions
- ✓ Frequently play back what you hear
- ✓ If something needs to be talked about, bring it out
- ✓ Foster connections between team members
- ✓ At end, ask each person to summarize their own actions and impact of decisions
- ✓ Don’t assume silence is agreement
- ✓ Intervene when someone is not following protocols

When English is a Second Language

Non-native speakers must:

1. Listen
2. Translate
3. Comprehend
4. Formulate response
5. Translate/speak

Makes it harder to translate emotions and nuances

After the Meeting

- ✓ Post minutes
- ✓ Document decisions; next steps
- ✓ Verify action items; responsible party; and time frames
- ✓ Follow up as necessary

Americans can help by:

- Being cognizant of word choice
- Speaking slower with tonal inflection
- Being succinct
- Not interrupting
- Checking for comprehension
- Not dropping voice at end of a sentence

In General, for Virtual Meetings

Following a basic meeting process and structure is critical for virtual meetings. Remember, in general:

1. Planning is more important
2. Be explicitly inclusive
3. Pay close attention to the process

In summary, do your homework. Know the landscape of those attending, prepare your agenda in advance, take time to agree on and follow protocol, and follow up!

Next Steps

Ike: Use names frequently during meetings. Don't take silence as agreement. Follow-up.

Kay: Make protocols explicit, especially about multi-tasking. Plan informal time at the start of meetings.

Simon:

Wayne: In conference calls, say name before speaking and work on building relationships during meeting.

Keep in touch

For more information or to let us know about how this information has helped you with your virtual challenges, contact us at: info@heiterconnect.com, 978-597-9157, or www.heiterconnect.com.

