



Making the Most of Virtual Meetings

Goals

1. Participants will explore virtual meeting and strategies through experience and discussion
2. We help distinguish between best practice for normal times, and how virtual meetings might be adjusted to best serve during the pandemic with so many people new to WFH (Working From Home)
3. We enter into this dialogue in the spirit of co-sensing and co-creation, recognizing and including the talent and expertise of participants

Agenda

- 12:00 Intros + overview
- 12:05 Check In
- 12:15 **The How** of Virtual Meetings: Seven Steps
- 12:35 **The Why** of Virtual Meetings: Clarifying Intention
- 12:50 Q & A
- 1:00 Adjourn

Spirit of the Call

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This pandemic experience is a massive experiment in collective vulnerability. We can be our worst selves when we're afraid, or our very best, bravest selves. In the context of fear and vulnerability, there is often very little in between because when we are uncertain and afraid our default is self-protection. We don't have to be scary when we're scared. Let's choose awkward, brave, and kind. And let's choose each other.

Brene Brown

Check-In Questions

How are you doing personally with the pandemic?

What is one technique you use to ground yourself?

You will have ten minutes in break out rooms of 4 for these two questions. If you have extra time you can always talk about what you are learning or noticing, or what you would like to get from this call.

**THE HOW of Virtual Meetings:
Seven Keys to Supporting
Groups Online**

1. Beginning and Finishing Well

Do a check in. Make it simple enough so that participants don't have to think it through too much and can keep it brief. Make it personal enough so that it adds humanity and a personal tone to the call. For example: In three words, what has been one source of joy for you during the last 24 hours? Bringing the human in helps create the psychological safety that studies show is so essential to effective group work.

Do a closing. It can be quick. One example: Check in with yourself for a moment. In three words, what are you feeling after our work today?

2. Maximizing Participation

Invite people to speak by calling on them by name. This helps keep up a brisker pace and avoids the long pauses common on telephone conference calls

Make use of round-robins to make sure everyone is engaged, especially in larger groups.

Encourage and model non-verbal responses. Thumbs up, head nodding, finger snapping, etc. This kind of mirroring can energize a group.

Use small-group breakouts if you have larger groups. This can boost comfort and help participants be more generative.

3. Making the Most of Video

Consider the maximum number of people you can successfully support on a video call. Using breakout rooms for small group discussions can help, but 15-20 participants seems the limit for meetings to embody real engagement.

Maximize the number of people participating by video. Encourage them to use their video screen, vs. just listen. If possible, discourage people from having multiple participants on one video screen.

Encourage participants to use gallery view (like the Brady Bunch), so they can see everyone.

When people participate by home, there will often be interruptions. That's to be expected! Let people know it's okay to mute and go off video if needed.

4. Technology Can Be Your Friend

Have people use their mute button, especially if many people are participating, to minimize ambient noise. And then be ready to remind people to unmute, as people will forget and begin talking...silently.

It's inevitable that some people might have unstable internet connections or other issues. If someone freezes, move on quickly and let them know you'll come back to them.

Consider using screen sharing. (But don't forget to stop using it so people can go back to seeing each other.)

Use polling, Q&A and chat tools.

Encourage playfulness using video platform features like modifying people's screen name or backgrounds.

5. Chance Favors the Prepared

Having an agenda with times can create a reassuring structure for participants. But be flexible and remind participants that you'll adjust to the flow and energy of the conversation.

Think about asking participants to do some work in advance of the meeting. This could be advance reading, jotting down thoughts in response to key questions, filling out a survey, or writing in a shared document.

Be as clear as you can about the purpose and nature of the meeting at the outset. Is it about generating ideas? Decision making? Having clear expectations going in can enable participants to get the most out of the experience.

6. Reading the Room

Getting a sense of consensus or how a group's shared viewpoint is evolving will mean needing more frequent round robin rounds.

Consider the 5-finger exercise as a quick and dirty device for checking the temperature in the virtual room. 5 fingers means full support; 3 fingers means "meh...fine with me" ; a fist with no fingers raised means "I will actively work to undermine this decision or direction"

Go where the energy of the group is. Sometimes the best meetings make mid-course corrections, extending or shortening time as needed. If you want to get a sense of how your participants are responding, ask them. Use what you observe to redirect the flow and say why.

7. Virtual Can Be Just As Good or Better

We've noticed how some people can approach video meetings like they're phone calls, only you can see each other. They'll do email, talk with colleagues, and often don't look at the screen. We'd suggest you approach them like in-person meetings, only you're on video. That means greeting people by name, providing feedback through words, gestures or facial expressions—everything you'd normally do if in person.

And there are advantages to video calls over in-person meetings. Using gallery view on your video calls can provide a comprehensive picture of how the group is responding and allow you to pick up on energy—positive or negative—and quickly see if someone has a question. At their best, video calls can provide a sense of the whole, encourage listening, and support dialogues even better than in person.

THE WHY of Virtual Meetings: Clarifying Intention

Working from Home and **Self-Quarantine** create new stressors amid ongoing ambiguity. Now more than ever we need to be mindful of our human need to be seen, to feel part of something larger, to preserve our sense of agency when much of our usual liberty and approaches are constrained.

Plan Ahead

In addition to strategies for virtual facilitation when you are actively on a call or video, it is important to spend time thinking through in advance what meeting design and approach will best set you up for successful engagement.

It's key to distinguish between the functions best filled by Synchronous vs Asynchronous communications.

Decisions are often best introduced and explained by email; managing the reaction of groups and teams to decisions and listening in for potential adjustments is the work of conversation and dialog.

Polling and surveys can create an initial ecosystem map of group opinion; individual storytelling and advocacy are essential in pressure-testing strategy and in persuading groups to stretch beyond their initial positions.

Clarifying Intention

Organizations, teams, and collaborations need to continue to support work cultures that engender learning, co-creation and impact.

Make time on your virtual gathering for participants to show up and check-in on how they are navigating these challenging times

Soliciting Offers & Requests can be a powerful tool for helping networks share in the work of supporting one another

Consider setting up virtual lunches or happy hours for more informal and emergent dialogue, hang time, and relationship maintenance

Articulating Desired Goals & Actions

Shorter is often better for virtual meetings.

Ask yourself what elements of the meeting might be done in advance or offline.

If using pre-readings, keep them to a length that encourages actual pre-reading



Thank You