Interaction Associates

white paper

20 Simple Ways to Improve Virtual Meetings

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INTRODUCTION

Do you lead or participate on a dispersed team? If so, you know that, while collaboration offers a competitive advantage in theory, realizing that advantage in reality can be daunting. This article examines the microcosmic currency of the dispersed team – the virtual meeting – and offers practical solutions to make this most essential element of collaboration work more smoothly, producing better outcomes and more satisfaction.

This white paper examines dispersed teams and offers improvements for virtual meetings by:

- Examining the business case for dispersed teams.
- Offering a validated framework for team success.
- Providing 20 easily-implemented strategies for improved meetings.

Interaction Associates has helped many companies learn to facilitate virtual meetings successfully. The secret – if there is a "secret" – lies not in choosing the perfect technology – though that helps. It lies in applying the requisite skills and strategies to enable people to collaborate successfully.

THE ADVANTAGES OF DISPERSED TEAMS

More and more people are working in dispersed teams: teams whose members, by choice or by circumstance, are not located in the same building - or even in the same hemisphere. In diverse locations, people often can collaborate to develop information and products more quickly, more cheaply, and more efficiently than they could if they were all in one location. The distributed placement of employees allows companies to be much more agile in responding to customer requests or production issues. Other cost savings come from the ability to reduce or redistribute office space. The opportunity for virtual collaboration also creates ways to increase the involvement of key stakeholders in core work processes and decisions, allowing for improvements in both employee satisfaction and work quality.

One example of dispersed team success can be found at the Swiss firm Novartis. In May 2001, Novartis won U.S. Food and Drug Administration approval for Gleevec, a breakthrough medication that arrests a life-threatening form of cancer called chronic myeloid leukemia, or CML. The drug enjoyed the fastest approval ever granted by the FDA for a cancer drug. Devising a novel approach to a complex problem and assembling the right expertise to solve it did not happen on its own. Management made strategic decisions that encouraged a cross-functional, dispersed network to develop. Novartis's organizational structure was deliberately designed to have permeable boundaries. The global oncology business unit, for instance, comprises marketing, sales, and research functions in different geographies. Alex Matter, Novartis's former head of oncology research, explained, "We bring together different disciplines, functions, and geographies to try to break up silos." He attributes much of the success of the development of Gleevec to that difference.[1]

To meet patient demand, the company devised a creative way to produce Gleevec in large quantities in Ireland immediately, instead of manufacturing the drug in smaller quantities first in Switzerland, as was customary. That change shaved a year off the normal production schedule. The development of Gleevec and its unusually rapid time-to-market wouldn't have been possible without trusted networks collaborating across geographic boundaries. In hundreds of global companies in many industries, virtual teams are realizing results like these.

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PROBLEMS

The benefits are clear; however, many challenges face those managers struggling to implement the virtual workplace. In many cases, organizations have sought to capitalize on the opportunities and benefits without having a plan in place to manage to the downside pitfalls. The virtual workplace is dependent on technology, which in many cases is still mysterious to the non-initiated or prone to "going down" at the wrong time. Technology curves are varied. Some business facilities may have sophisticated videoconferencing facilities at corporate headquarters, while a remote outpost may be struggling to get the circa-1985 fax machine to work.

Many team members are working with colleagues from different cultural backgrounds, with the attendant problems of cross-cultural communications. A merger can open a Pandora's Box of cultural issues for the respective employees in the merging institutions. Even steeper challenges are posed by international acquisitions, where not only do cultural differences exist, but language differences as well.

The personal challenges are significant too. Much of the virtual work is done over the telephone, supplemented by e-mail and intranet communication. Communication research shows that humans take in 65% of their information in communication through their eyes by interpreting the body language of the speaker. Workers are now losing over half the information they have relied on in interpersonal settings. The ability to build trust and a sense of team is likewise compromised. It is possible for workers in remote locations to have little to no sense of real connection to the big picture, making them vulnerable to leaving the organization. The lack of strategic connection may show up in quality of work or breakdowns in the interpretation of specific business initiatives.

[1] *A Practical Guide to Social Networks*, By: Cross, Rob, Liedtka, Jeanne, Weiss, Leigh, Harvard Business Review, 00178012, Mar2005, Vol. 83, Issue 3.

A more global challenge is that, in many cases, co-located individuals who have been working together in collaboration were not highly skilled in collaborative capability in the first place. Many professionals lack a basic understanding of simple meeting management techniques. When they were sitting together in a room, however, they were often able to stumble though and make it work. Now, the same professionals may be in five different geographies, spanning eight time zones, with some at the office and some in their homes. The lack of effective meeting management techniques has become a serious stumbling block to effective collaboration. Certain aspects of group dynamics make this stumbling block particularly hard to overcome in a virtual setting.

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GROUP DYNAMICS AND A FRAMEWORK

In landmark research done in the 1950's, theorist Wil Schutz identified three basic needs that individuals have when they come together to collaborate: inclusion, control, and openness.[2] For any group work which is focused on producing a collaborative result to be effective (face-to-face or virtual), these basic needs must be met.

An individual's need for inclusion deals with issues of significance. In a group setting, if individuals are not fully included, they often end up feeling ignored or marginalized. In a face-to-face setting, the need of the individual to feel included is handled to an extent by the fact that he/she is at least in the same room with the other group members. In virtual team meetings, many team members may wonder (and for good reason) if any of the other team members even know that they are there.

According to Schutz' theory, humans have a second need: for control or influence, which is related to a feeling of competence or self-efficacy. If we as humans do not know how to control our environment, it can trigger an underlying fear of humiliation. In a face-to-face meeting, individuals have a variety of ways to influence the direction of the conversation, from raising their hands to speaking more loudly. In virtual settings, it is often very difficult for individuals to know how to get the attention of the meeting leader. This inability to influence the process can lead to a feeling of powerlessness, or an assessment that there is no point in even trying to give input. In many cases, the process of the meeting has been so poorly considered that even the leader may not exactly know how the conversation is going to go. This lack of deliberate meeting process will increase participants' feelings of powerlessness over their ability to influence discussion in a meaningful way.

[2] Schutz, W.C. (1958). *FIRO: A three-dimensional theory of interpersonal behavior.* New York: Rinehart.

The last need in Schutz' theory is that of openness. This need relates to the feeling of being likable, and can trigger an underlying fear of being rejected. It can be difficult in a face-to-face setting to create a truly open environment in which all members feel free to give their ideas and share their opinions. In virtual meetings, these challenges are magnified. Most meeting leaders agree that they want to create virtual environments which promote openness and buy in; yet, few know exactly how to do that.

Research has shown that there are specific practices that meeting leaders can introduce in their meetings which will drastically increase the overall process and relationship satisfaction of virtual meetings. (And when the process works, and people feel good about the collaborative setting, the overall quality of the results likewise will increase.)

What follows is a distillation of these best practices. The focus of these tips and techniques as presented in this article is the teleconference. Research has shown that the telephone is still the primary means of virtual collaboration. However, all these techniques can be applied to other means of distributed meetings: the video conference and the web-based meeting.

The first ten techniques presented are tactical best practices that will increase the effectiveness specifically of the teleconference. The next ten strategies are ideas that will improve the quality of any meeting, and are the ten areas that leave a teleconference most vulnerable to failure if they are neglected.

TEN TECHNIQUES FOR IMPROVING YOUR TELECONFERENCE

Note: These tips will help the meeting leader - the person who calls the meeting and is accountable for the results of the meeting. A person in the role of virtual facilitator will also find these techniques useful.

1. Create a team display

It is common to do introductions at the beginning of the meeting. In virtual space, while introductions are being done, the meeting leader should create a graphic which depicts the physical layout of the group. If there are four locations that are represented in the meeting, the leader would draw four circles. It can be helpful to organize the circles to mirror the actual geography of the meeting. A circle for Los Angeles on the left, a circle for Chicago in the center left, New York in the center right and London on the far right. Fill the circles in with the names of the participants in those locations. If Martha, Bill and Steve are in LA, write their names in the first circle. If Debbie is in Chicago, write her name there, and so on. The team display becomes a tool that allows the meeting leader to keep track of who is actually in the meeting. If the leader is in a conference room with several other people on a speaker phone, have a scribe or recorder draw the team display on a flip chart on the wall so that all the members of the group in the room can remember who is in the meeting. If latecomers arrive, they can tell at a glance who else is "in" the meeting. This team display will be also be used to support your ability to implement the next two techniques.

2. Use participants' names

It is a useful courtesy to call people by names. It creates rapport and establishes trust. In teleconferences, however, it is more than a nice to have, it is a necessity. When you are addressing group members specifically, use their names. The use of names is a key contributor to feelings of inclusion. If you have more than one person with the same name, create a way to distinguish them (Chicago Jim and Philadelphia Jim, or simply Jim A. and Jim L.)

3. Poll the group

This technique is key to meeting inclusion needs, as well as control needs. At critical junctures in the meeting, when a team agreement is being reached or when input is required, go around the virtual room and call everyone by name, asking if they agree or have an idea to share. Participants in the virtual space have no visual cues which allow them to know when it is their turn to speak. Meeting leaders may say: "What do you all think?" as a way of getting input. That technique is not sufficient to generate input and get buy in. Literally call each member by name. If you have just presented the context for the meeting and wanted to make sure everyone understood before you moved to the first topic, the cadence would sound like this: "Martha, does that make sense to you?" and Martha would reply: "Yes." "Alice, did you get all that?" and Alice would reply: "Check." And so on, until everyone in the group has had a turn to respond. This technique may seem time consuming, but participants report a significant increase in feelings of inclusion and control when the meeting leader takes the time to check with each by name. It also reduces the incidence of virtual participants dozing off if they know they will be periodically called on to give input. This technique should be used several times during the start up when you are getting team members oriented to the meeting purpose, and then used for each key agreement or decision *and* before a shift to a new content area.

4. Use remote facilitators

Your virtual collaboration may involve working with different groups of remote participants who are all gathered around a common speakerphone. At the bank referred to earlier, it was common for there to be two meeting locations, one location in San Francisco with several participants, and the other in Charlotte with several participants. The two remote locations were linked by speakerphones with a number of participants in two separate conference rooms, 3,000 miles apart. In this kind of virtual collaboration, it is useful for the meeting leader to appoint a remote facilitator in the remote location. This remote facilitator performs common facilitation functions and acts as the eyes and ears of the meeting leader in the remote locations. During a Q&A process, for instance, the remote facilitator can remotely manage the process of calling on participants with questions and making sure their questions are answered. They can also enforce the ground rules in the remote locations as well.

5. Create appropriate ground rules for teleconferences
Ground rules are a mainstay for managing effective group interaction, but they need to be tailored to meet the needs of groups meeting virtually. Common ground rules for distributed groups may include:

- No sidebar conversations
- No multi-tasking (e.g., running e-mail while participating in the telecom)
- Participants must identify themselves when they speak
- Use of "mute" technology as per group agreement (i.e., most groups prefer that non-active speaker phones be muted to minimize extraneous noise being fed back to other locations.)

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6. Create a common visual focus
Of the three common intake modes (visual, auditory, and kinetic), the majority of people are visual. If you are going to increase meeting participants' ability to follow the content of the meeting, it is important to provide mechanisms for visually documenting the flow of ideas and keeping people on track during the discussion.

There are different ways to provide common visual focus. When a group is meeting together, use a scribe to record brainstormed lists, action items, or other key discussion points as the group is working. Obviously, virtual members will not be able to see the list; encourage these virtual participants to create their own lists. You can periodically review to make sure the lists are the same as a way of checking for understanding and agreement. Electronic documents such as PowerPoint presentations can be used and reviewed in virtual settings to keep participants on the same page. These electronic documents can be projected onto screens in rooms with large numbers of participants, even though the presenter him or herself may be many miles away. Simply providing talking points for a session allows participants to follow a hard copy overview of key ideas, which helps keep the meeting on track. (It does require the meeting leader to have a general idea of how the discussion is going to go, which will mean a little extra time spent preparing for the discussion.)

Using videoconference technology is another good way to help provide a visual focus.

7. Provide color commentary

When there is some kind of activity going on at the leader's location, it is helpful for him/her to describe to remote listeners what is happening. For instance, "We're waiting a moment while Mimi gets out the notes." Or "Everyone in Phoenix appears to agree with the points that are being made. Let's check with Salt Lake." These verbal descriptions of activity make the meeting more "real" to virtual participants and increase feelings of inclusion and openness. The leader may wish to set up a special role, a kind of "phone buddy," to take on the task of providing this commentary for remote listeners as a way of sharing responsibility for success and making sure the task is performed. It is also helpful to review progress and summarize discussions as you go. These periodic reviews and summaries help keep people focused on the task at hand.

8. Have a technology guru available

One special role that is required for virtual meetings is that of the technology guru. Whenever technology is going to be used (video conference, teleconference, web-based meeting, etc.) experience shows that technology glitches are likely. It is helpful to have notified a technology person of the meeting, so that the appropriate phone jacks can be identified, the correct keyboard sequence is understood, or whatever technology support is needed is on hand to support the team and prevent annoying and time-consuming breakdowns and delays.

9. Set up the room in advance

Advance preparation is a key to success in any meeting, but leaders/facilitators of a virtual meeting need to make sure that the room or the appropriate technology is set up in advance. If conference call lines will be used, have the numbers and password codes set up well before they are needed. Advance preparation will allow additional time to trouble shoot.

10. Supplement with other virtual forms of communication

The teleconference can be supplemented with other forms of virtual communication. One primary supplement is the web-based meeting, in which participants log on to a common website (such as Webex or GoToMeeting). This e-supplement allows participants to work together on a common document, and make changes to it collectively and in real time. Brainstormed "lists" can be created virtually in these web meetings so that all participants have access to the same group memory. As mentioned earlier, power point presentations can be used to keep people moving through a content-dense presentation without losing track of the idea flow.

Companies that set up conference calls often offer a service whereby the conference call can be recorded and transcribed. This service may be useful if the meeting is one where some people cannot attend, and may need detailed documentation reviewing what happened.

TEN STRATEGIES TO DEAL WITH BASIC MEETING PROBLEMS (WHICH, IF NEGLECTED, CAN MAKE YOUR VIRTUAL MEETING A NIGHTMARE)

1. Plan ahead
One rule of thumb suggests that as much time should be spent planning the meeting as time is spent in the meeting. In virtual meetings, this need is increased, with respect to setting up the technology. Since the meeting space will be more complex, additional time must be budgeted for managing this complexity. It is also important to allow lead time to create written agendas, outcome statements and talking points which can be faxed or e-mailed to participants. Having these key meeting tools in hard copy form makes it easier for meeting leaders to get understanding of the purpose and process for a collaborative discussion.

2. Sequence topics strategically
All topics are not equally relevant to all meeting participants. Sequence topics in your meeting so that participants can "roll off" the meeting when that topic is complete. Even better may be to consider having separate meetings. For example, in the training industry it is common to have one-half the team working on "content development" and the other half to be working on "technical/logistics" issues. Set up a topic flow which will require participants to be in virtual space only for the content where they can add value.

3. Identify a facilitator
It is extremely helpful in all meetings to have clearly identified the individual who will be managing the discussion. This person may not always be the meeting leader, but a team member who is less invested in the content and thus more able to manage the discussion. The facilitator acts as the process conscience of the group, and his/her main roles involve insuring process clarity, team member involvement, and progress toward the goal.

4. Use non-work related check ins/team builders
All teams benefit from relationship building activities. Some of these may be simple "around the room" type questions (From the business-y "What is your vision for this project?" to the relationship-oriented "Everybody talk about something that is important to you about your own cultural heritage.") In virtual space, these activities build trust and rapport and increase feelings of openness. The check in can be a quick open-ended question, a game (one professional does a quiz at each team meeting; the questions relate to the business, the industry and/or company history), or something tactile which draws the room together (one team provided individual digitized pictures of its members and each team member introduced his or her picture to the group and said something about it.)

5. Clarify roles (who is there and why)
It is always useful to explain why people are in the collaborative space and the role they play. When doing introductions, make sure that it is clear what people are expected to bring to the meeting (based on organizational role) or how it is they will use the

information generated in the meeting. If participants are there in an advisory capacity, or are simply observers on an orientation track, make sure it is clearly understood why they are there. It is also useful to be clear about who in the meeting has decision-making power, and who is in the role of input giving only. This role clarification step is useful in any meeting and is especially helpful in virtual space. Clarity around roles helps deal with inclusion needs. In some cases, the participants themselves may not even fully realize why they are attending a specific meeting without being reminded.

6. Use desired outcomes

This one item is probably the single most important determinant of a meeting's success or failure. In brief, the desired outcome expresses the product or products that the meeting has been called to create. The desired outcome is generally a product (decision, agreement, plan, list) or information (an understanding or awareness of something, with the intent that that information will be used in the service of some activity). If you are looking for the leverage in your meetings (where can I put the smallest amount of effort to produce the biggest return?), take time to create effective desired outcome statements and circulate them to team members before the session begins.

7. Clarify decision making

If the meeting is likely to involve decision making, clarify up front who will be making decisions and who will not be. In some cases, different team members will make different decisions (one person might make decisions about budgetary matters, another might make decisions about design issues, and a third might make decisions about logistics). Meetings often get bogged down in an unrealistic expectation that the decision making method will be group consensus. While a group consensus is desirable, it may not be possible, and it should be clear to the group who is most accountable for the decision, so that at the appropriate time, the decisions can be made and the group can move on.

8. Conduct "round robins" to get all opinions out/Open before you narrow

When a controversial issues surfaces in the group, participants often begin to go "back and forth" with one another, each trying to convince the other of the rightness of his/her position. Instead of encouraging this kind of behavior, open an issue up and allow each virtual group member to say whatever he or she wants. Consensus will often emerge from the discussion, and by the time each team member has weighed in, most of the relevant data will then be available to inform the decision. For example, if the team is trying to decide what to do about a key bug that has been identified in a program, allow each member in turn to suggest a solution or solutions, rather than allowing two highly vocal participants to argue back and forth about the merits of two different solutions. Surprisingly, creating this opening usually takes less time, and increases participants' feelings of "control."

9. Get agreement on the problem before getting agreement on the solution
One of the key causes of interpersonal breakdown in a business setting (virtual or otherwise) occurs when meeting participants argue about solution without having agreed on the definition of the problem that is being solved. In some cases, they are actually trying to solve different problems or they see the problem in different ways. Backing up (let's make sure we understand the problem we are trying to solve) allows team members to find common ground and makes it easier to agree on solutions or courses of action.

10. Conduct a meeting evaluation
In order to be a "learning environment," teams must occasionally reflect back on their performance. At the end of any meeting, it is useful to do a "what worked and what didn't work about" discussion (sometimes called "plus/delta") to give team members a chance to air issues and make suggestions. This evaluation process is helpful in any meeting session, and it doubly helpful in virtual space as team members learn to navigate through new media. Be sure to use the "round robin" to give everyone a chance to give input.

OTHER FORMS OF VIRTUAL COLLABORATION

While this article has used the teleconference as the foundation for exploring virtual collaboration, it is worth reviewing other tools available to support the virtual workplace. The first is the fax. The fax machine is still an indispensable support, particularly when there is a need to distribute monochromatic graphics or documentation, to coordinate tasks rapidly (it is sometimes faster to receive a fax than to download an e-mail) and where technology restrictions prevent the use of e-mail.

E-mail is useful to distribute information to multiple people quickly when there are no issues with compatibility or downloading attachments.

Electronic bulletin boards (team rooms, Lotus Notes boards) open up discussion in a group format on which many people may have opinions. They can also be used for storing documents that many others will be accessing and making use of.

Videoconferencing can be used when available. It is the teleconference on steroids, allowing participants to see as well as hear each other. It reduces the challenges associated with having no common visual focus in a teleconference, though many of the other common effective meeting practices should still be followed.

Data conferencing (the web meeting) is an excellent adjunct to the teleconference and can be used to allow participants to work on graphics and documents in real time.

FACTORS TO CONSIDER WHEN SELECTING A FORM OF VIRTUAL COMMUNICATION.

If you have the luxury of choosing from among different modes of virtual intercourse, there are a few questions you should consider when making your selection.

Access: Will everyone have access to it? Most people have a phone; remote employees working in their homes will probably not have video conference technology available.

Utility: Will it support the work we are doing? If the work involves going over documents or files in detail, a web-based meeting or even face-to-face meeting might work better than a teleconference.

Security: Are there security issues? Faxing confidential documents can sometimes be a problem, since the receiving fax location may not be a secure environment.

Support: Is there technical support available if there are problems? Using complex technology (video conference, web based meeting) is risky if there is a likelihood that users will not know how to trouble shoot problems in locations where there is no technical back-up.

Training: Can we train people to use the technology and the process? If possible, consider setting up training programs which will allow team members time to practice using the collaborative technology and process when there is nothing at stake. Interaction Associates (415-343-2600) offers programs in group process work and a module in virtual collaboration.

Cost: Is the cost appropriate to the business problem being addressed? Don't be penny wise and pound foolish. If the business problem is a significant one, pay the money to co-locate employees to work on it. If not, don't spend money needlessly on video conferencing or web meetings when a simple telephone call would have worked just as well.

IN SUMMARY

As we move ahead in the information age, we can expect our communications to be ripe with possibility and fraught with challenges. Global companies face the challenge of developing, manufacturing, marketing, selling and delivering new products. Dispersed teams are part of a collaborative strategy that encourages innovation. In an age where agility is required, we must master the ever-shifting art of virtual collaboration to reap its benefits and deal with our own growing pains.

For a simple tool for team leaders to help building trust, visit *"Facilitating Trust: What Team Leaders Need to Know"* at the link below:
http://www.interactionassociates.com/ideas/2007/07/facilitating_trust_what_team_l_1.php

ABOUT INTERACTION ASSOCIATES

Interaction Associates, Inc. is a leading innovator in learning, leadership development, collaboration and performance improvement solutions for Fortune 1000 companies. The firm serves global clients and has offices in Cambridge, MA and San Francisco. For nearly 40 years, IA has helped clients build collaborative capability to produce extraordinary results, improve critical business processes, and create and maintain productive work relationships. Interaction Associates' work benefits hundreds of organizations and hundreds of thousands of individuals around the world.

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