

# Six Critical Success Factors for Running a Successful Virtual Meeting

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## What is a "Virtual" Meeting?

A virtual meeting is an event or series of events where participants join in from multiple locations. A virtual meeting may be held "real time" where everyone is participating as the same time, often by teleconference or video conference. A virtual meeting may also have asynchronous components where participants are working at different times appropriate to their time zone or schedule.

For the purposes of our discussion we will consider virtual meeting as distinct from online chat, bulletin boards or social networks. A meeting is more formal and structured than these type of events and will most usefully have defined objectives and outcomes, an agenda and a facilitator. Our focus is on that facilitator or meeting manager and the skills we need to get great results from the virtual sessions that we design and facilitate.

As facilitators and meeting managers we have a lot to pay attention to from the planning and design of a meeting, to who should attend and how to manage the group dynamics. Everything that we already know about good facilitation applies to virtual meetings and using web meeting tools. In addition to the normal meeting planning activities there are some particular issues that we need to pay attention to as facilitators of virtual meetings. We can summarize these issues into six critical success factors for getting great results from virtual meetings.

## Six Critical Success Factors for Getting Great Results Virtually

1. Planning a viable agenda or series of agendas
2. Effective use of technology
3. Preparing participants and pre-work
4. Keeping participants focused and engaged during a virtual meeting
5. Building trust and social capital
6. Maintaining momentum between meetings

## Planning a Series of Agendas

The nature of effective virtual meetings is that they tend to be short, up to 90 minutes, and spread work over a period of time. Pre-work is often an essential tool to limit actual meeting time and ensure that the precious “real time” that we have together is focused and productive. As we plan out our virtual meetings is it useful to determine level of interaction needed to meet our objectives whether they be for communication, data gathering, idea generation, problem-solving or decision-making. The type and level of interaction needed for each part of our meeting will in turn determine the tools and technology that we need.

Breaking up our work into a series of short, virtual meetings enables us to involve the fewest number of necessary people at each stage. Large virtual meetings can be unwieldy and tend towards one way communication rather than meaningful interaction and collaboration. A series of short focused meetings with good communication in between helps allows us to involve the right mix of people at the right time.

## Planning a Virtual Meeting – Checklist

1. What are our objectives – tangible and intangible?
2. What would my agenda be if this were a face-to-face meeting? What is the level of participant interaction?
3. How could each step be done virtually?
4. Who needs to be involved at each step?
5. What can we do asynchronously? What needs to be real-time?
6. What technology tools might best support each step of the process? What do I have available to me?
7. What obstacles can I anticipate? How can I address these?
8. What role do I need the client or sponsor to play?
9. How do can I best prepare participants?
10. How much time will it take me to coordinate this meeting / series of meetings?
11. What additional help do I need?
12. Will this virtual process meet our objectives? What do I need to renegotiate?

## Using Technology Effectively

There are many different kinds of technology available today that can augment audio conference with tools to increase participant engagement and interaction. To get great results from our virtual meetings it is important to match the tools and technology to our meeting objectives. As virtual meeting facilitators we need to be aware of the full range of technology tools available to us and become practiced and proficient in their use. There is no short cut here – we need to do the research and hone our skills. We need to be as adept at using our virtual meeting tools as we are with flip charts and PowerPoint, so that we can focus on the content of the meeting and not worry about the technology. At first this may mean having someone else at hand to manage the technology so that we can focus on the agenda and the group

dynamics. However, for many virtual meetings we will quickly be able to run the whole show for ourselves.

Technology needs to be easy to use and accessible to all participants, including you. Asynchronous pre-work activities are often a useful way to have participants test and use the technology ahead of time to avoid wasting the first 15 minutes of the meeting getting everyone online. When you use technology in a virtual meeting things will occasionally go wrong – you are not in control of your environment as much as you are at an in-person event. Have a back-up plan should technology fail and be prepared to reschedule if the technology is getting in the way of an effective meeting. On the other hand there is no need to shy away from virtual meeting technology - start simple, but start!

The following slides help match different technology tools to different meeting objectives.

### Research Virtual Meeting Tools

Real time (Synch)	Asynchronous
Instant Messaging	Email
Audio Conferencing	Scheduling
Video Conferencing	Social Networking
Web Conferencing	Document Archive
----- Web Meeting	
	Web Survey -----

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### Match Technology to Objectives

Objectives	Virtual Meeting Tools	
	Real time (Synch)	Asynchronous
Presentation		
Coordination	Instant Messaging	Email
Data Gathering	Audio Conferencing	Scheduling
Idea Generation	Video Conferencing	Social Networking
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Team Building	----- Web Meeting	
Team Comm'ns		Web Survey -----

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Three different kinds of web-based virtual meeting tools are worth further clarification.

### Web Conferencing Tools

Web conferencing tools are most useful for pushing information out to participants and are real time only. Technology includes tools for:

1. Presentations
2. Shared desktop
3. Shared applications & whiteboards
4. Chat
5. Quick polling
6. Recording

Examples of web conferencing tools, most often managed centrally by a corporate IT department, include WebEx, MS LiveMeeting, GoToMeeting, iLinc and Elluminate. A company that offers inexpensive options for smaller firms is Dimdim. This field is in-flux and an increasing

number of free and inexpensive web conferencing tools are emerging, combining presentation options with VOIP (voice over IP) and video options.

## **Web Meeting Tools**

Web meeting tools are a smaller niche of products that focus on pulling information in from participants and creating a highly interactive meeting environment for both real time and asynchronous collaboration. These tools are designed with a facilitated meeting process in mind. Technology includes tools for:

1. Brainstorming
2. Categorizing
3. Voting / Prioritizing
4. Group decision making
5. Surveys
6. Action plans
7. Meeting Documentation

Examples of web meeting tools include FacilitatePro from Facilitate.com.

## **Web 2.0 Tools and Social Networking**

Web 2.0 tools aim to facilitate communication, secure information sharing, interoperability, and collaboration on the World Wide Web. These concepts have led to the development and evolution of web-based communities, hosted services, and applications; such as social-networking sites, video-sharing sites, wikis, and blogs. These are designed for many-to-many asynchronous communication, with a much more informal and personal form of interaction than other virtual meeting tools. However, they can be used in a variety of ways to support ongoing virtual teams, knowledge sharing and broad networks of participants. Some sites and networks are managed by a moderator or facilitator; others are very much driven by the participants. Tools include:

1. Social networks – member sites usually that anyone can join and create their own public or private profile. Members build networks with other members, sharing information and referrals.
2. Blogs – public online journals with a blogger as author; others add comments and cross-references.
3. Wikis – Web-sites designed for collaboration where everyone can edit, update and append pages. Success depends on building active, sustained participation.
4. Media sharing – Images and podcasts/video clips.
5. Tagging – Keywords to index interesting stuff to share with likeminded people.
6. RSS feeds – Publishing of frequently changing online content to feed other pages.
7. Social messaging – ways to keep in touch with a social network or create a business following with brief real-time updates of up to 140 characters

Examples of Web 2.0 and social networking tools that you might use to support a virtual team include: LinkedIn, Facebook, Yahoo Groups, Google Groups, Wetpaint, WordPress, Twitter, RichSync, uTube, etc. Run a Web search and you will find new options popping up every day.

## **Preparing Participants – Pre-work**

Our third critical success factor is pre-work and preparing participants. Pre-work launches you right into a productive conversation. Our roles as facilitators and meeting leaders shifts to a significant degree to getting everything and everybody prepared ahead of time so that the precious time that we have together can be efficient, productive and engaging. This may involve developing new behaviors among your meeting participants who may be used to just showing up at the appointed time, giving their (often divided) attention for the duration of a teleconference and then moving on to their next meeting.

Preparing participants involves providing information to be reviewed and commented upon ahead of a real time meeting. Preparing participants involves soliciting information from them so that you can focus the meeting agenda and determine who needs to be involved when. Use pre-work for data gathering and information sharing that doesn't require real-time interaction.

Preparing participants also involves checking in frequently to ensure that everyone is prepared and paying attention ahead of a teleconference so that the whole group is ready and able to fully participate. Just as we pay attention to the level of participation in a face-to-face meeting, we need now to pay attention who is participating, and who is not, in our virtual meeting – before, during and after. Enlist your client / meeting owner to help set expectations. Set ground rules ahead of time and work with your virtual team to adjust these over time so that everyone takes ownership and responsibility for a productive meeting. Use email to send out meeting notices and remind people of before meeting activities - ask for acknowledgement, keep track of who has responded and be prepared to follow-up with phone calls as necessary. As virtual facilitators we need to expect spend a lot more time on communication and coordination before the meeting.

## **Engaging & Focusing Participants**

Engaging participants consistently comes up as the number one challenge in running effective meetings in our surveys of facilitators. We all know how difficult it is to stop people from multi-tasking on a teleconference – we do it ourselves. As facilitators our role is to make virtual meetings a short and focused as possible with just the needed people involved. The preceding critical success factors all play into this – planning a series of short meetings, selecting the right technology and preparing participants.

1. Start the meeting by asking people to remove a distraction, ask about these
2. Make multi-tasking difficult – keep participants interested and occupied
3. No more than three slides or 10 minutes before a truly interactive activity
4. Vary ways in which people participate

5. Keep track of who is talking or participating
6. Keep them guessing – call on people often in an engaging and conversational way
7. Everyone off mute – set the expectation for interaction
8. Take the group’s temperature often – polling, asking, listening
9. Assign members different responsibilities – scribe, facilitator, time-keeper, etc.
10. Stick to the promised agenda & timing – preferably finish the meeting early
11. Keep an on-screen, that is, visible “parking lot” for off-agenda topics

The lack of visual cues is perhaps the most disarming aspect of facilitating a virtual meeting. While video conferencing can help, this is often difficult to coordinate and is more effective one-on-one than with groups of any significant size. As facilitators we need to be creative in finding new ways to check in with participants and determine their level of engagement, interest and participation. We need to be careful not to dominate the “air time” and regularly seek input and feedback from participants, individually and as a group. Removing our own visual distractions such as while on a virtual conference allows us as facilitators to fully listen and pay attention to the group dynamic. The cues are there if we are asking and listening.

Web meeting tools are an under-utilized option for keeping participants focused and engaged. They help you shift the mode of a virtual meeting from being 80% listening to 80% interactive participation.

## **Building Trust and Social Capital**

Trust and a comfortable level of social or personal interaction are enormously important for effective virtual meetings. We lose some of our influence as facilitators in managing the room with our own physical presence and personality and need to find new ways to engage with participants and create an appropriate and effective dynamic within the group. We need new ways to establish our role and the trust of participants in us as the meeting facilitator. We need to be aware of the interactions and reactions within the group without the usual visual cues and clues.

1. Find out what trustworthy behavior means to this group – credibility, sincerity, caring, competence, reliability
2. Minimize power differentials – up front and throughout life of team
3. Create norms for areas that can do the most to build trust/avoid distrust – handling conflict, fulfilling commitments, reporting
4. Create safe environment – where people can ask for help, admit problems, surface issues and concerns
5. Deal promptly and directly with behavior that may breed distrust
6. Meet face-to-face at start-up of an ongoing virtual team

7. Enable opportunities for building relationships beyond the tasks at hand – build in time for informal conversations; share personal updates, photos, etc. as we might in an office environment
8. Allocate tasks so that small groups can work together, foster interdependencies
9. Build in reasons to communicate frequently, using multiple channels
10. Check and vary your tone of voice, on a call and in emails to match the situation and create the right tone for your meeting

## Inspiring Motivation, Sustaining Momentum

Transitioning from a face-to-face event to a series of short virtual meetings means that there is now a need to maintain momentum and motivation between meetings. Our role as facilitator becomes one of project manager and logistics coordinator as well as the social glue that holds the group together. We needn't take on the whole responsibility for this ourselves but we do need to recognize the importance of continued communication and engagement and devise ways to keep in touch with participants and keep them in touch with each other.

1. Keep shared goals in sight
2. Track progress visibly – dashboard, thermometer
3. Celebrate achievements – rewards, awards
4. Recognize great unseen performance – publicly, privately
5. Check in with individuals frequently – express appreciation, surface issues, take a pulse
6. Strive for 1:1 communication at least once a month

## Measuring Virtual Meeting Effectiveness

It is always helpful to keep the end in mind and determine for ourselves and our clients what an effective virtual meeting means. Setting goals and objectives for each meeting and determining how we will measure our effectiveness sharpens our focus and preparation.

1. Did we meet our objectives and desired outcomes?
2. Did we achieve the desired level of participation?
3. Did the technology add value?
4. Did we manage within our timeframe?
5. Did participants demonstrate confidence and trust in the process and results?
6. Will participants look forward to another meeting?
7. Will our client hire us again?

Seek feedback from participants as well as your client or meeting owner and engage them in helping the next virtual meeting be even more successful.

## Conclusion

Getting great results from virtual meetings involves paying attention to many of the same things that we need to pay attention to as facilitators or leaders of face-to-face meetings. All of our facilitation skills apply and will stand us in good stead as we start to run more meetings virtually. We needn't be intimidated by the challenges of virtual meetings and can overcome the lack of visual cues by designing an agenda that will allow for full participation and finding ways to check in with participants before, during and after a teleconference. We do need to become familiar with and adept at using a variety of web-based meeting tools and this means being willing to try things out and finding time to practice.

**Read more** Contact [MoreInfo@Facilitate.com](mailto:MoreInfo@Facilitate.com) to request a free copy of "75 Tips for Getting Great Results from Virtual Meetings".

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