POWERFUL TIPS FOR HIGHLY PRODUCTIVE VIRTUAL MEETINGS

by

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*"**If you had to identify, in one word, the reason why the human race has not achieved, and never will achieve, its full potential, that word would be 'meetings**."*
~ Dave Barry, American Humorist

VIRTUAL MEETINGS

Due to the pandemic, we have had a sudden shift to more online activity, so virtual meetings are becoming an emerging norm. However, we are well aware that this sudden transition to virtual environment has caused frustration to many of us. To help you conduct more productive virtual meetings, let me share some ideas and tips that can be implemented immediately in your professional practices.

Note: If you have any technical questions about Teams, please see the links below or call Service Desk at ext. 53454 or (816) 234-3454 with any questions or concerns.
- CMH Microsoft Teams Training
- IS Office 365 SharePoint page

How to Prepare Yourself for Virtual Meetings

Conducting online meetings with people from different locations can be difficult to manage. However, if you prepare everything in advance and ensure that your meetings are well structured, moderated and well communicated, online meetings can become an extremely effective platform for connecting your team members and other employees in your institution.

Here are the steps to plan and implement your virtual meetings effectively:

Before A Meeting

1. **Schedule your meetings in Teams or any other virtual platforms (e.g., Zoom, Lifesize)**
   You can set up your own meetings or have them set up for you by your administrative assistant. Send the meeting invitation to all the pertinent attendees. If this is a recurring meeting (one-on-one or a team), schedule your meetings ahead of time, so everyone has them in their calendar.

2. **Prepare a clear and well-communicated agenda**
   Never hold an online meeting without a clearly written agenda. An agenda communicates to attendees that the meeting will be conducted in an orderly fashion and that productivity is the main goal. Send this agenda several days in advance before the meeting and seek acknowledgment from all the participants that they have received for the purpose of confirmation. Also, reviewing the agenda in advance gives attendees time to put together

reports and other documents required for the meeting. Agendas also important to document what happened during the meetings over times.

What to include to an agenda?
- Meeting date and time
- Technological format (Include links to connect and any login instructions)
- Attendee expectations
- Meeting objectives
- Meeting itinerary

As a best practice, it is advisable to publish your virtual meeting agenda at least five days before the date of your meeting as well as add the meeting agenda directly into the calendar invite. In this way, you give attendees a quick heads-up as to what the meeting will be about and also acts as a handy point of reference in case, they need a reminder (see the agenda template under the supplementary materials section).

3. **Send a reminder of the meeting**
   Sending a meeting reminder helps boost awareness and reminds attendees to prepare for the meeting. In your message, you can include a request for everyone to test the meeting technology. The details outlined in the original meeting invitation.

4. **Prepare your technology system in advance**
   Make sure that the technology you are planning to use works well, long before the meeting starts. Make sure that your camera and microphone are working and that your meeting software supports multiple participants. The same rules apply to the meeting participants. Prior to a virtual meeting, all participants should test their technology to make sure that they are comfortable with the user interface and its features of the tool. See the troubleshooting tips below.

Troubleshooting Tips

Camera not showing?	• Turn off your camera and back on again • Ensure that your browser can access your camera. If not, check your "Settings" and make sure "Allow desktop apps to access your camera" is set to "On" To set the camera settings correctly on Microsoft Teams, use these steps: 1. Open **Microsoft Teams**. 2. Click the **Profile** menu from the top-right. 3. Select the **Settings** option. 4. Click on **Devices**. 5. Under the "Camera" section, use the drop-down menu and select a camera. 6. Confirm with the preview that the camera is working Once you complete the steps, you can try making a test call, or you can try to call someone in your contacts to see if the camera is working.

Audio not working?	• Restart your Teams software (Disconnect and connect again). • Check whether you are muted and if yes, "unmute" yourself. • Make sure that your audio device is selected and your browser can access your microphone. If not, check your "Settings" and make sure "Allow desktop apps to access your microphone" is set to "On." To enable microphone access for Teams on Windows, use these steps: • Click on the Start Menu and head over to Settings > Privacy > Microphone. • Inside this screen, make sure that the 'Allow desktop apps to access your microphone' option is turned ON. • In addition to that, you should also double-check if you have enabled microphone access to the Teams app under the 'Choose which apps can access your microphone' section. • If you are using Teams on the web, make sure the web browser that you use Teams on has access to your microphone as well under this section.

Meeting not opening or loading correctly?	1. Confirm your network connection.
	2. Confirm you are an active Teams user.
	3. Ensure that you are using one of the recommended Browsers
	    ◦ Google Chrome
	    ◦ Firefox
	4. On Windows, you can force Teams to quit by clicking Ctrl, Alt, and Delete together on your keyboard. You will then see a prompt on the screen. Choose *Task Manager* from the list. You should then see *Microsoft Teams* under the *Apps* section. Click this, and then choose *End Task*. This will cause Teams to quit. When you launch the app once again, it should load up as normal.

5. Set clear expectations

You can set meeting ground rules and clear expectations to inform everyone involved in the meeting regarding both performance (objectives, results, outcomes) and behavioral (expected values, behaviors and attitudes) expectations. If your expectations are high, your team will strive to achieve those expectations and the average performance will go up.

6. Appoint a meeting facilitator/moderator

In online meetings, there's a high chance of miscommunication due to internet connectivity and audio or video quality issues. A meeting facilitator acts like an orchestra conductor. By appointing a facilitator, you give that person the authority to be in charge of facilitating the flow of the meeting, to make sure it runs smoothly and covers the main agenda items. A good facilitator will make sure everyone listens and stays focused on the topic with the agenda.

During A Meeting

7. Show up on time
It is important to begin the meeting promptly at the start time. If the meeting leader/host will be joining late for a reason, the meeting facilitator should let people in and keep the participants engaged until the meeting leader shows up.

8. Record the meeting
Recording the meetings is a kind of double-edged sword since it may create privacy and data security concerns. Make sure that your privacy and security measures are up to date and transparent as lawsuit discovery requests can include video meetings just as commonly as emails and documents. When you record your meetings, make sure that you should obtain consent from the participants in advance. However, recording meetings have multiple benefits as below:
- Provide convenience for those who are late can go back and catch up, on demand or for those who were supposed to or wanted to join in on a meeting but could not make it
- Turn into a performance enhancer since it creates a culture of accountability and responsibility or create follow-up tasks and ensure everyone is aligned on the next steps
- Analyze previous decisions and to figure out the rationale behind them for the future decisions
- Reduce distraction when participants try to take notes
- Create an exact record of everything that was presented and discussed
- Allow the host and facilitator to improve their own meeting style when they play them back to a trusted colleague who can offer tips

9. Make introductions
Once everyone is present, make introductions including names, titles and roles. This acts as an icebreaker and sets the tone for everyone contributing to the call. There are some common mistakes people usually do when they start the conversation. For example, "Hi, everyone. Let's start with some introductions and background. Who wants to go first?" In a virtual meeting, this type of language produces silence since no one is quite sure who will go first or a few people may start at the same time, especially if you do not use a video camera. Instead, guide your introduction by saying, "Hi, everyone. Let's start with some introductions and background. Jennifer, why don't you go first, followed by David and Sarah?" After, participants introduce themselves, start your meeting explaining your meeting purpose, scope, and deliverables when everyone knows who is on the call.

10. Introduce brainteasers
If the introduction will not be valuable for your meetings or recurring meetings, you can take a couple of minutes to make some small talk to get everyone warmed up before the meeting begins. For example, tell a brief story, relate an experience, or ask everyone about his or her week. Their comfort level will rise, and it will be easier to transition into the agenda. Another option would be: You can use a team-building exercise before getting into the point of the meeting. A funny interactive quiz could also break the ice between virtual meeting attendees.

11. Give each person time on the agenda

Giving each person time on the agenda fosters greater collaboration and helps get input from all the participants/team members. To use time effectively, it is important to set time limits to share the time with everyone. This also prevents some participants from dominating the conversation or group domination, which is one of the most corrosive problems. So, time-capping your meetings can significantly boost your productivity and help you extract a lot more value in the limited time you have (e.g., participants will stay focused and the meeting will not go off track.).

Also, let me share a few tips on sharing time for larger meetings:
- Using breakout rooms is helpful for larger groups. In this case, you need to provide clear instructions to your participants for an effective group management that will produce fruitful outcomes. If you are going to use this option the first time, practice it in advance
- Also, you can have additional facilitators, timekeepers, and recorder/note takers to help keep things on track.

12. Minimize distractions

In virtual meetings, background noise at different locations (kids, pets, and noisy backgrounds in public areas) can easily cause miscommunication and can be a distraction to the group as a whole. Therefore, muting is a necessity when someone is presenting an idea or speaking. Another common ground rule is to ask attendees to mute their lines until they are ready to speak; doing it cuts down on distracting background noise. Also, as a host or a moderator, you can mute all participants upon entry to avoid getting derailed as latecomers trickle in.

Here are more tips on minimizing distraction:
- As the host, you will not be able to lead an engaging meeting if you try to provide technical help. So, a facilitator should moderate emails or text/chat messages from attendees who cannot connect.
- You can advise your participants to sit a closed and well-illuminated room with a clear background.
- They can use headphones and a collar microphone instead of their laptop's microphone to ensure clear communication.
- You may also want to ask participants to state their names before speaking. Even though you are using video (webcam), it is possible for screens to be frozen and some participants may be relying more heavily on the audio component. This way, group members will be able to follow who has said what.

13. Discourage the side tasks

Virtual meetings are the ideal opportunity to check email, catch up on critical to-do items and quickly edit some documents that are all valid work tasks, but they draw attention away from the meeting and dramatically reduce its value. Keeping focus on the meeting requires preparation and a new set of etiquette rules, including a combination of technology and specific pedagogical techniques. To reduce some of the disengaging behaviors, you can ask everyone to keep their cameras turned on during the meeting. In this way, you are able to observe their visible behaviors whether they are paying attention. This will also benefit the host to ensure the pace of the meeting right and justify the attendees' attention.

14. Increase engagement with interactivity

As mentioned above, make sure everyone gets a copy of the agenda ahead of time and then ask people to submit questions and comments in the chat box or via email before the meeting begins.

Attendees have a shorter attention span for virtual meetings, so you can apply the following approaches to have everyone participate in your virtual meetings:

- Use polls to collect on-demand feedback from attendees on specific topics in real time.
- Use an element of gamification to encourage participation such as a leaderboard of ideas shared.
- Create an attendee checklist to mark as people speak or call out particular participants and ask their opinion on what is being discussed, or periodically call on individuals to speak, even by virtually "going around the table" before a decision is finalized.
- Keep everyone engaged by using activities and questions that require their participation. If people are engaged, they are less likely to get distracted, and you will retain their attention longer.
- Encourage attendees to "raise their hands" when they want to make comments. This can help the facilitator drive closure without the risk of excluding an introverted participant's views.
- Use visuals, ask questions or breakout rooms and whiteboard tools if content allows.
- During the discussion, pause regularly and ask for attendees' input. You can use the Round Robin technique that will allow you to ask everyone to comment on the subject matter. This encourages participants to stay focused, and helps you monitor their emotions and attention levels.
- Assign tasks during the meeting such as "when we get to this, remind me of this." These sorts of things will ensure multiple participants are following along.

15. Conclude with clear action items

At the end of the meeting, recap what has been covered, what has been assigned, and to whom it has been entrusted. This can eliminate the problem of misunderstanding, vague promises and assurances from the participants. In fact, the facilitator/moderator should extract action items for each of the agenda points and get acknowledgment from all the participants. The key rule is to identify an action item, assign it to one individual and agree on a deadline. Without these steps, no action item can be tracked effectively (e.g., agenda + meeting + summary = tell them what you're going to them, tell them, and then tell them what you told them.).

After A Meeting

16. Share meeting notes and follow up

Once your virtual meeting concludes, gather and debrief about the experience making a summary of all the meeting notes to distribute in a timely manner. Your summary should include the participants with the list of action points identified for each agenda item along with the name of the person responsible for its delivery. You can also ask all the participants to acknowledge the meeting notes and confirm their understanding. Also, remember to thank them for their participation and encourage them with words of praise.

17. Evaluate the meeting
Meeting assessment and evaluation will help you determine the effectiveness of meetings you organize or attend. You can use two basic approaches to your meeting evaluation: 1) self-assessment meeting evaluation, and 2) participant meeting evaluation. You can use the sample evaluation methods provided in the "Supplementary Martials" section of this document for a single meeting, a reoccurring meeting, or even all the meeting types.

In conclusion, not being able to work together in the same room with your team members and colleagues may become a major challenge in virtual meetings. However, meeting virtually is a learned behavior, and you will be amazed how much you can get out of it over the time as you practice more. Hope you incorporate these tips, including some of your own best practices, to create a productive and interesting presentation each and every time.

SUPPLEMENTARY MATERIALS

Virtual Meeting Design Approaches

Designing and planning for a successful virtual meeting is not like writing an agenda for a meeting. While agenda planning, what topics will be discussed for how long and by whom, is important, virtual meeting design requires more thoughtful prework and good planning. The following checklist is focused on virtual meetings of any size or format and lays out a basic set of requirements for a virtual meeting that encourages and enables interaction and active participation.

Virtual Meeting Design Checklist

Date and Time	
Purpose	Why are you meeting? Everyone in the meeting should have a clear understanding of why this meeting is important to them.
Objectives/Desired Outcomes/Product	Write specific objectives that will answer questions of "What will we learn as a result of this meeting"? Choose a tangible outcome for the meeting.
Participants	Identify who needs to be at which meeting. Name and contact info
Rotating Roles	Facilitator/Co-facilitator Greeter (Check-In) Notetaker Timekeeper Technology Keeper
Meeting Norms	1. 2. 3. 4.

Materials	Participant agenda Pre-Work Reading
Engagement Strategies	Identify icebreakers, discussion questions or other activities that will help participants relax and ease them into a group meeting or learning situation. Knowing that there will be a mix of introverts and extroverts on the call, you will also want to think in advance about how you can encourage the strongest participation from everyone (e.g., making the meeting as inclusive as possible)**.**
Facilitator Agenda	Based on the participants agenda. Map out process steps including framing, engagement, and technology tools needed.
Communication/ Scheduling	Recurring Calendar invitation Reminders Follow-up notes
Technical	Technical support before/after meeting if needed.

A Design Checklist by Allen Interactions

"Virtual Meeting Design is More Than an Agenda"

The following design checklist is posted by Christina Coidakis-Barss, PhD, MS, MEd, SSBB on Allen Interactions Website:

The dynamics of transitioning from site based to remote teams can be a challenge. Apply the **Plan-Do-Check-Act** framework to help leaders and teams' transition to remote work and the requisite virtual meetings. With disparately located team members, virtual meetings are wonderful opportunities to build engagement, trust and candor.

Plan
This is the design stage of the virtual meeting space. It may seem ironic to have a meeting about meetings, however it's vital to invest time into ensuring good remote team citizenship.
- Design rules of engagement. For example, discuss with the team what it looks and how it feels to be respected, respectful and valued.
- Maximize technology available to build relationships and collaboration. Recommend using video to bring humanness to the interactions. The plus side of this option is it reduces 'multi-tasking' and 'present absence.'

Do
This is the execution stage. Before, during, and after the meeting.
- Before the meeting
  - Test the technology and validate time zones
  - Share the agenda so all parties may be prepared
  - Conduct an 'updates' survey and share the results.

> - *Don't lose valuable meeting time conducting a one way round robin of 'updates.' Shift that time to a two-way interactive discussion.*
> - During the meeting
>   - Connect people via a virtual ice breaker. Give people the opportunity to learn about each other.
>   - Practice good meeting hygiene habits. Have a timekeeper, lead, scribe, and even an accountability coach.
>   - Ensure every person has the opportunity to weigh in during discussions.
>   - Adhere to the 'rules of engagement' and honor all in attendance.
>   - Practice ELMO (enough, let's move on) and have a parking lot for off topic conversations.
> - Post meeting
>   - Thank everyone for their participation.
>   - Have the accountability coach follow up with action item owners to keep momentum.
>   - Have an easily accessible repository for agendas, historical documents, and meeting minutes.
>
> **Check**
> This is about managing the team between the meetings. Good leaders check in and often.
> - According to the team or organizational preference, utilize text or technology to connect individually with team members.
> - Pulse surveys and crowd sourcing techniques will help to unite your team and provide a psychologically safe way to provide feedback.
>
> **Act**
> This is the adjustment stage. According to your feedback mechanisms, make adjustments to the remote environment you are cultivating. This is a wonderful way to build trust with your team by demonstrating you hear, honor, and act on their opinions.
>
> **Source:** eLearning Leadership Blog. https://info.alleninteractions.com/virtual-meeting-design

Virtual Meeting Agenda Template

Here is a virtual meeting agenda template that will help you design an effective agenda for your virtual meetings.

Children's Mercy	**CHILDREN'S MERCY KANSAS CITY**
Date and time	
Technological format	(Include link to virtual meeting, including any login instructions)
Contact information	(e.g., name and phone number for people having questions or having trouble logging in)

List of attendees and their titles or positions	
Attendee expectations	
Meeting objectives	
Meeting itinerary	• Announcements if applicable • Introductions • Approval of prior meeting minutes • Follow-up from previous meeting • New business items • Action items • Next meeting's agenda
Comments/meeting evaluation	
Adjournment	

Samples Assessment and Evaluation Methods for Virtual Meetings

Here are three ways to quickly gather participant feedback about your meeting. It does not matter how you collect the information. It only matters that you do collect and use it. The insights gained can lead to conduct better meetings.

1. **T-Chart**
   You can use a T-Chart as illustrated below both for self-evaluation and obtaining group feedback.
   - *Self-Assessment and Evaluation*: If you have recorded the meeting, you can sit down to view it to take notes what worked well (things to keep) and what did not work well or what behaviors you did not like about yourself (thing need to be changed). Write all these things on the T-Chart to create intentional practices when you conduct your future meetings.
   - *Group Feedback*: Ask people to reflect on the meeting and invite them for comments on items they think should be kept or changed for the next meeting. You will need to encourage them to be candid about the problems they saw. This method is fast and usually yields an insight into potential solutions.

Sample T-Chart

KEEP	CHANGE
• • • •	• • • •

2. Four Steps Meeting Evaluation

This evaluation format can be used to obtain group feedback as an on-demand evaluation. Here is the instruction how to perform it:

Steps	Directions
Step 1: Set the frame	Ask the following questions to the meeting participants. 1. What worked well in this virtual meeting? 2. What could be improved for the future meetings?
Step 2: Think-Write-Share	• Participants think quietly for one minute, timed by facilitator. • When time is up, facilitator asks participants to type their answers to the questions into the chat box. • Facilitator summarizes responses. • Facilitator repeats for the second question.
Step 3: Reflection	• The facilitator leads discussion for a short time to allow the group to identify one thing which will improve the next virtual meeting.
Step 4: Action step	• The note taker captures the meeting improvement action step for next meeting.

3. Web-Based Surveys
You can use a quick follow-up web-based survey that would provide anonymous feedback. If you make it easy and act on the what you learn, you will help raise your group's willingness to provide feedback for future surveys. You can use or modify the following two virtual meeting evaluation forms putting on a web-based platform (REDCap, SurveyMonkey, etc.)

Virtual Meeting Evaluation Form (Sample 1)

• **Objective**: To collect on-demand feedback from our attendees regarding their satisfaction and the performance of our virtual meetings. The results will be utilized to make our future meetings better.
• **Anonymous**: Your responses will be kept anonymous.
• **Questions or problems** with this evaluation form? Please email Kadriye O. Lewis, Ed.D (kolewis@cmh.edu).

1. **Please indicate the extent to which you agree or disagree with each of the following statements regarding the virtual meeting you have attended.**

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
The meeting objectives were clearly					

communicated in advance of the meeting.					
The meeting objectives were met.					
Follow-up actions resulted from the meeting.					
Follow-up actions were assigned to specific team members/attendees.					
The meeting leader(s) effectively moderated the meeting.					
Meeting attendees had an opportunity to participate.					
The right people were invited to the meeting.					
The meeting was the appropriate length of time.					
The speakers were easily heard.					
The presentation was easily viewed on the screen.					
The meeting technology worked well with no interruption.					

2. How productive was the meeting?
- Not at all
- A little
- Neutral
- Mostly
- Extremely

Please tell us why you feel that way about how productive the meeting was:

_____

3. Please rate each aspect of the "Technology" experience you had during the meeting.

	Terrible	Poor	Average	Good	Excellent	
Ease of access to the meting platform						
User-friendliness of the meeting platform						
Video quality						
Audio quality						
Screen Sharing						
Connectivity						

If you had any technical difficulties before or during the virtual meeting, please specify:

4. Did the meeting start on time?
- Yes
- No

4. Did the meeting end on time?
- Yes
- No

5. What did you find most effective about this virtual meeting?

6. What did you find least effective about this virtual meeting?

7. Please share any additional feedback you have for the meeting organizers.

Thank you for your time!

Virtual Meeting Evaluation Form (Sample 2)

Objective: To collect on-demand feedback from our attendees regarding their satisfaction and the performance of our virtual meetings. The results will be utilized to make our future meetings better.

Anonymous: Your responses will be kept anonymous.

Questions or problems with this evaluation form? Please email Kadriye O. Lewis, Ed.D (kolewis@cmh.edu).

1. **Please indicate the extent to which you agree or disagree with each of the following statements regarding "Purpose and Plan" of the meeting you attended.**

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
The meeting had a clear purpose.					
The host provided a clearly defined agenda.					
Intangible and tangible deliverables were defined on the set of meeting.					
This meeting was worth my time.					

2. **Please indicate the extent to which you agree or disagree with each of the following statements regarding the "Duration" of the meeting you attended.**

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
The meeting started on time.					
The meeting ended on or before scheduled end time.					
The meeting was the right length to accomplish the goals without rushing or wasting time.					

3. **Please indicate the extent to which you agree or disagree with each of the following statements regarding the "Participants" of the meeting you attended.**

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
The participants were the right people for the purpose of the meeting.					
The participants came the meeting prepared well.					
Participants came to the meeting prepared to discuss ideas related to the meeting agenda.					

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
Participants understand their roles they should play during the meeting.					

4. **Please indicate the extent to which you agree or disagree with each of the following statements regarding the "Interaction" of the meeting you attended.**

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
The host/facilitator maintained a balanced flow of conversation among all participants.					
The host/facilitator respectfully addressed unproductive and exclusionary behaviors that may affect the team effectiveness and the meeting outcomes.					
Participants stayed focused on the meeting agenda items at hand.					
Participants actively contributed and were kept engaged in the discussion process.					
Participants demonstrated respectful behaviors towards one another.					

5. **Please indicate the extent to which you agree or disagree with each of the following statements regarding the "Action and Results" of the meeting you attended.**

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
The meeting group made all decisions effectively.					
The host/facilitator assigned action items that need attention.					

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The host/facilitator recorded all decisions to distribute the group.					
The group achieved the meeting objectives.					
The group was invited to evaluate the meeting performance.					

6. **Please rate each aspect of the "Technology" experience you had during the meeting.**

	Terrible	Poor	Average	Good	Excellent	
Ease of access to the meting platform						
User-friendliness of the meeting platform						
Video quality						
Audio quality						
Screen Sharing						
Connectivity						

If you had any technical difficulties before or during the virtual meeting, please specify:

7. **Overall, how satisfied are you with this virtual meeting you attended?**

- Not at all Satisfied
- Partly Satisfied
- Satisfied
- More than Satisfied
- Very Satisfied

8. **What is one top opportunity for making this meeting better?**

9. **Please share any additional feedback you have for the meeting organizers.**

Thank you for your time!