Virtual meetings – How to get the best out of them?

9 April 2020

Compiled by Victoria Pezzi – Meetings and Events Coordinator, CGIAR System Organization, with the contribution of Fiona Bourdin-Farrell, Senior Advisor, Gender, Diversity and Inclusion; Nadia Manning-Thomas, Board and Council Relations Manager; and Olwen Cussen, Board and Council Relations Coordinator. Sources can be found at the end of the document.

Going from a face-to-face meeting to an online meeting can be a big adjustment for all those involved. Good planning and a supportive environment is key to helping everyone transition to a new way of collaborating.

Content overview

Topic	Slide number
Top 5 tips of early planning	2
Tips for agenda drafting	3
Presentation tips	4
Ensure high participation	5
Anticipate Technical issues	6
Be at your best	7
Tips for before and during the meeting	8-10
How to get the best out of Zoom and its tools	11-12
Working Examples	13
Tips for smaller team meetings	14
Sources	15

TOP 5 tips of early planning

Identify the following…

Purpose and goals

What do we want to achieve in this individual session or across a range of interactions? Set goals that are Specific, Measurable, Achievable, Relevant, and Time-Oriented

Attendees

Who can help me achieve these goals? Who needs to be kept informed? In which time zone are attendees based

Roles

Be clear on the various roles (Chair, Host, Project leader, Content expert, Facilitator, etc.) and put in place various channels to make sure that communication flows

Support team

What kind of support will be needed? A facilitator, a note taker or someone providing technical and administrative support can make a big difference

Tools

What technology (Zoom, Teams, Blue Jeans) and tools (brainstorming, break-out rooms, whiteboard, Q&A, Poll, etc.) would better fit our needs and help us achieve our goals?

Tips for agenda drafting

Objectives and additional resources planning

The objective of the overall meeting, and of each session should drive your agenda planning. Ask participants to do some pre-work and reading ahead of the meeting, so that you can use the time in the meeting for well-informed productive discussions. Adding videos and presentations can help the session be more interactive.

As appropriate, **share the support documentation in advance**,
especially videos and other files that would require a high amount of bandwidth if shared live

Schedule of the day

- ❑ The first day you can include a quick welcome session, overview of the technology, introductions and set of "internal rules"
- ❑ Every day, you can include: a summary of the decisions taken the day before, clear communication/reminder of the objectives for the day/sessions; Q&A, polls, break-out, parking lot sessions; etc.
- ❑ The entire session shouldn't last more than 3/4h per day
- ❑ 45 min/1h per session max
- ❑ Include a 5, 10 mins break every hour

Presentation tips

- If you want your group to be active listeners and engaged participants make sure that presentations don't last more than 5 minutes.

- Ask for inputs, use polls, Q&A's, graphics and reduce text as much as possible to make the session more interactive.

- Remember that if people have low bandwidth, they might have a poor video/image resolution – **so keep it simple!**

Be mindful of inclusion

Make sure clear language, large fonts, and high color contrast is used. Provide captions and visuals where possible for audio, and provide descriptions where possible for visuals

Ensure high participation

Invite participants

Be mindful of the different time zones and send calendar invitations including connection details. Offer to test the software ahead of the event.

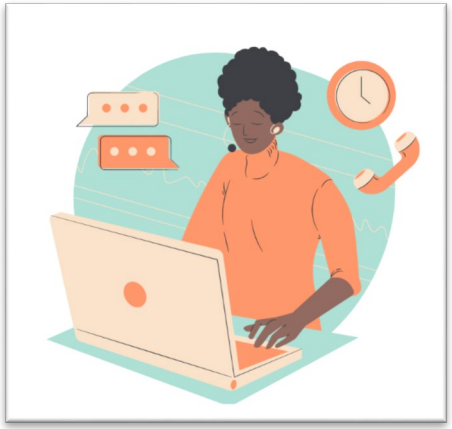
Confirm participation

Make sure you provide a way for invited guests to confirm participation (via a form, a registration tool or simply asking them to accept or decline the calendar invitation for this purpose)

Follow up and share the participants list

Draft and keep a participants list up-to-date. A few days before the meeting, send reminders to those who have been invited but haven't registered yet.

Anticipate technical issues



Test the technology

Nothing kills momentum at the start of a meeting like a 15-minute delay because people need to download software, can't get the video to work, etc. Prior to a virtual meeting, offer a test to all participants and provide them with user guides to make sure they are comfortable with the major features.

Always provide an audio dial-in option

Video conferencing relies on a strong internet connection that may not always be available. Participants need to have the possibility to move to a dial-in option in case their internet connection goes down or is not strong enough.

Turn off all programs that are not essential

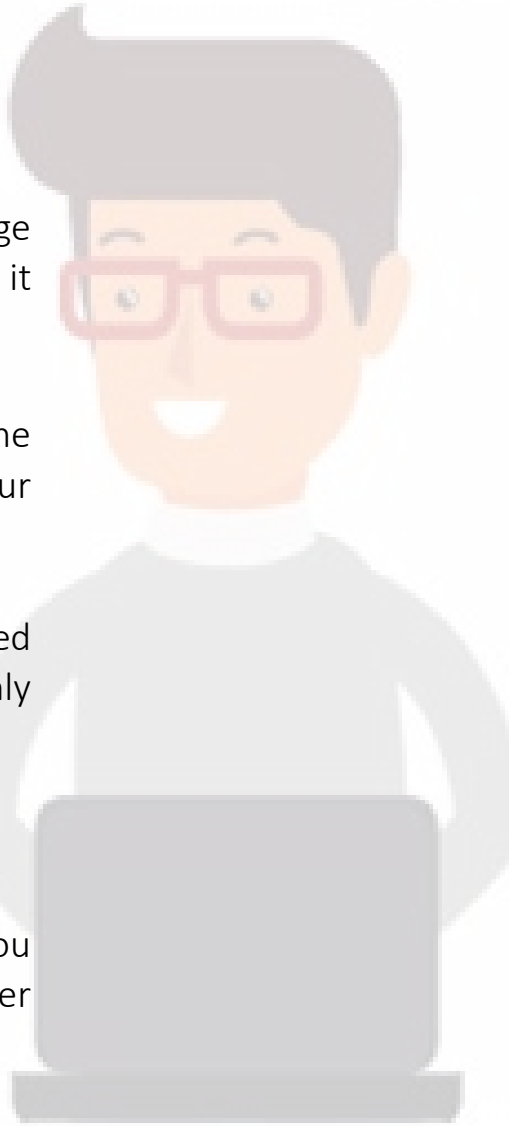
Especially those that use big amounts of bandwidth like clouds (SharePoint, OneDrive, Dropbox) or videos. Also turn-off programs that use notifications (e-mail calendars, instant messaging applications).

Connect to the Internet using a cable

and turn off wireless, if possible.

Make sure that the host has excellent bandwidth and internet connection

To get the best out of your virtual meeting, be at your best!



Be on time

Use a good quality mic-headset and webcam to optimize sound and image (built-in computer speakers are not recommended – the sound is not ideal and it creates feedback noise).

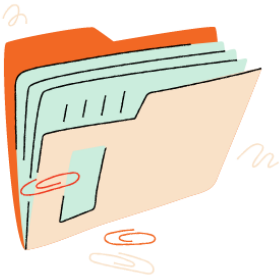
Use video. To make it more real and let participants see that you are fully into the meeting, turn on your video whenever possible and be camera-ready. Raise your webcam to eye level!

Mute your microphone when it's not your turn to talk. Any unwanted background noise can reduce the success of the online meeting. Open your mic only when you have to say something.

Check the lightening in your room and adjust your environment accordingly.

Be present - people can tell when you are multi-tasking and they can feel that you are not fully in the conversation. Try not to visit other websites or chat with other colleagues while the meeting is ongoing.

Before the meeting



Create a repository to gather and share documentation and files related to the meeting

Ask participants to read and get familiar with the support documentation before the meeting

Have a plan B in case people can't access virtual conferencing at all. Figure out ways to bring in their 'voice' and perspectives through providing slides of their points

Create a Whatsapp/Teams group to exchange among facilitators/moderators

At the beginning of the meeting

Welcome each participant individually for groups under 30 people. For bigger groups send a participants list 5 minutes before the meeting starts.

Give a brief overview of the tools that will be used. Remind participants to mute their mics when not speaking, to use the different tools available to share their inputs (chat function) and to turn on their videos when possible.

If relevant, remind participants that a record/recording is being made of the session.

Ask participants to give you a heads-up before leaving the session via the chat function – so that you know what they missed and also you can realize if they are having technical issues.

Let participants know that a parking lot will be available at the end of the meeting and no voice will be lost.

During the meeting

As needed, **contact participants privately and keep an eye on** :

- those who have difficulty accessing the session
- those who don't/can't have their video on
- Introverts

Consider how to really make a conversation - by not just taking points one by one, but asking people to reflect on a point made

Start each day with a PPT that recaps the decisions and agreed actions of the previous day(s)

End each day with a recap of discussions, decisions and agreed actions of the day (possibly using a PPT)

How to get the best of Zoom and its tools

For larger events distribute the various roles – see suggestion below

- 1 person fully focused on content (sharing presentations, etc.)
- 1 person to manage the break-out rooms
- 1 person to monitor the chat and keep an eye on the participants list (who comes in and out)
- 1 person to wrap-up and recap at the end of each session
- 1 person to take notes (if required)

Useful links:

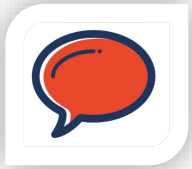
Link to Zoom Video Tutorials

Link to Zoom Frequently Asked Questions

How to best use the Breakout rooms

- Explain why they are breaking out and what is expected from them when they come back to the general session
- Designate one facilitator per group
- Max 3 people per group (including the facilitator)
- Limit time. Send notifications 2 min before the end.
- The facilitator keeps a list of points that need to be put in parking lot
- Nominate someone to report back (they can use the last 2 minutes for this)

How to get the best of Zoom and its tools



Private Chat function

- Use it to solve technical questions;
- to structure the interventions and feed in more substance into the meeting;
- to encourage introverts to ask questions and give inputs;
- to ask if they are still there (if you haven't seen/heard them for some time);
- for people to let you know when they leave the session.

Polls

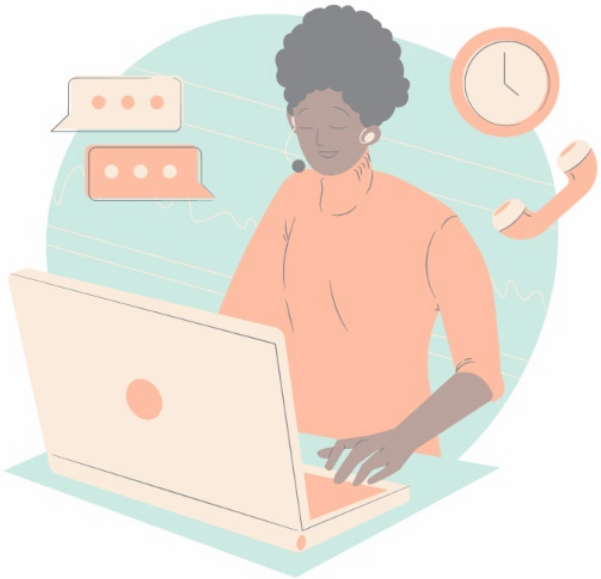
- Use them to make the session more interactive:
- Ask people how they are feeling, if they need a break, their agreement to move to the next item
- To record and show preferences and points of views

Participation Panel

- To raise their hand if they want to speak or comment
- To answer yes or no to a question, or give a thumbs up (e.g. Can you all hear me? Did you manage to do the pre-work?

Working example

A working example of a virtual meeting that includes some of these principles can be found here. Feel free to use this template and adapt it to your meeting/event as needed.



Tips for smaller team meetings

Having previously focused on bigger meetings and events, this last slide aims to provide a summary of those tips that apply for smaller team meetings

Have a clear agenda

- Find a convenient time for all team members and send calendar invitations with connection details
- Ask the team what agenda items they would like to see included in the agenda
- Create an agenda with clear expectations and objectives
- Circulate the agenda in advance of the meeting
- Designate a Chair who will keep track of time and make sure the objective of the meeting is met

Be at your best!

- Be on time
- Use a good quality mic-headset and webcam
- Turn on your video whenever possible and be camera-ready. Raise your webcam to eye level!
- Mute your microphone when it's not your turn to talk and open it only when you have to say something
- Check your lightening
- Be present – don't multi-task and turn off notifications

Be mindful of:

- Introverts – give everyone a chance to contribute
- Practice active listening – see an infographic on listening skills and active listening here

Sources

- Harvard Business Review – *Article dated 5 March 2020 by Bob Frisch and Cary Greene*
  https://hbr.org/2020/03/what-it-takes-to-run-a-great-virtual-meeting

- Forbes – *Article dated 17 March 2020 by Joseph Liu*
  https://www.forbes.com/sites/josephliu/2020/03/17/virtual-meeting-tips/#37bab97a7208

- The World Economic Forum – *Article dated 20 March 2020 by Simon Brandon*
  https://www.weforum.org/agenda/2020/03/working-from-home-heres-how-to-run-an-effective-virtual-meeting/

- NTEN – *Article dated 10 October 2017 by Beth Kanter*
  https://www.nten.org/article/9-best-practices-engagement-virtual-meetings/

- Canva - *Images and design*
  https://www.canva.com/