



Running effective teleconferences, virtual meetings

By Esther Schindler | Thursday, February 21 2008

You may be great at orchestrating an in-person meeting, but running an effective teleconference requires new skills.

Meetings are hard enough to run when the participants are all in the same room, fighting over the last chocolate doughnut. But any meeting you call, nowadays, probably has at least one person attending who works in a remote location. In some cases, everyone in the teleconference is dialing in. You may be great at orchestrating an in-person meeting, but running an effective teleconference requires new skills.

To help you get the most out of your meeting time, we asked professional meeting facilitators and several ordinary people to share their advice on conducting live meetings with remote participants (whether by phone, WebEx or videoconferencing).

Ordinary Meeting Guidelines Apply

Most of what you know, as a manager or meeting organizer, remains relevant. You still need to start the meeting on time, define the meeting objectives, invite the right people, etc. But if you don't have good in-person meeting skills, teleconferences will only make it worse.

Management consultant Steven M. Smith says, "People in organizations don't follow the guidelines for leading effective face-to-face meetings," he says. "Teleconferences, because of signaling and bandwidth issues, exacerbate those problems."

For example, it's good manners to send information in advance of any meeting, but it can be critical for teleconferences. Gerry Mann, Web development manager at Unitrin Business Insurance, urges organizers to prepare ahead. "Send out items to review well in advance and set the expectation for attendees to review the items," he suggests. Include an agenda (short and focused) and ground rules, such as when to use the Mute button, the keys this conference service uses to place the call on hold and so on.

An Aside: The "on hold" thing is a major irritation. Jim Coughlin, managing director of Foundation Systems, complains that people forget that they're not on an ordinary phone call. "I've had people on 50-person conference calls put their phone on Hold; and everyone else in the conference gets to hear their infomercial on Hold." Some teams may be willing to sing along with your on-hold music. Most are not.

An agenda isn't about your ability to lead a meeting; it is about the people at the distant end, says Daniel Mittleman, associate professor at the DePaul University School of Computer Science, Telecommunications and Information Systems, whose research focuses on group support systems and virtual meeting technologies. "They have no access to your nonverbal cues. They will lose place, lose focus and lose attention to the meeting." Also, in a meeting room, you intuitively notice if your audience doesn't get you, and instantaneously adjust. "Virtually, you won't notice if they don't get you; they won't tell you. So you have to be clearer—more explicit—the first time," he says.

The ground rules for your virtual meeting might include:

- Log on 15 minutes before the start of the meeting, since some online products require downloads and installation.
- Be aware of background noise.
- State your name when you speak.
- If you catch yourself multitasking, be responsible for your full participation.
- Turn off cell phones and PDAs.
- Stay out of your e-mail.

Be Their Eyes

But online meetings are different in several ways. According to Ken Molay, president of [Webinar Success](#), meeting organizers should distinguish between meetings with a local in-room audience and some remote attendees, and the meetings where everybody attends remotely. When possible, he says, keep the local meetings local and the remote meetings separate; it is tricky to meet the needs of both audiences when they're combined.

"In a combined audience situation, it is very important to continually think about the remote users' perspective," says Molay. "They can't see nods of the head around the table, or actions like looking through papers for the answer to a question. They also can't hear low-volume conversations." It's the meeting moderator's role to provide an audible connection with remote attendees. During a pause in the proceedings, for example, describe what is happening, so remote users understand the silence. Molay says, "Direct commentary loudly and clearly towards the microphone, and encourage other participants in the room to do likewise."

Nancy Settle-Murphy, principal and owner of Guided Insights, is making a presentation about a related topic, "Planning for Success: Translating from a Face-to-Face to a Virtual Agenda" at the upcoming [International Association of Facilitators conference](#). She identifies six critical success factors for getting great results from virtual meetings:

- Planning a viable agenda or series of agendas.
- Effective use of technology.
- Preparing participants and prework.
- Keeping participants focused and engaged during a virtual meeting.
- Building trust and social capital.
- Maintaining momentum between meetings.

Encourage Participation

Common pet peeves among frequent online meeting participants reflect the tendency for people to become distracted from the matter at hand. It's easy for participants to pay attention to e-mail, chat or other things on their desktop and to lose focus on the meeting. Multitasking sounds good, but often it's not conducive to an effective meeting.

Sometimes, people in the same building dial into a meeting so they can multitask, points out Kevin Mackie, director of software development at [Oracle](#). But, he says, there's a false economy with multitasking. "To be sure, when people insist on having those 'around the room status meetings,' being able to get other work done is a boon; but for meetings where engagement and interaction is critical, it's important to ensure those who are participating remotely are as engaged as those who are in the room." For example, says Molay, meeting leaders should change the way they ask for feedback. Watch out for questions like, "Does everyone agree?" Remote attendees can't answer easily without stepping over each other's responses, points out Molay. Web conferencing software that includes polling features can help you solicit audience feedback.

Construct an agenda that encourages participant input, says Settle-Murphy. Assume that participants will start to get distracted after 10 or 15 minutes, or after three presentation slides. She says, "Design into your agenda ways to engage participants (with questions, online idea generation, visualization exercises, etc.) more frequently than you might in a face-to-face session." Vary the way you pose questions, she suggests, such as alternating a fill-in-the-blank statement, an open-ended question, asking for participants' "top three" of something.

One trick Mittleman uses is to engage in dialogue with an individual at a distant end. He says that person asks the questions others are thinking of asking; he can read nonverbal responses from the individual to know if he is following the message; it is less boring to listen to dialogue than to a monologue; and that person can fill him in on how he's being received.

Smith suggests that meeting leaders sequence the discussion, because teleconference participants don't know when it's their turn to talk. "Without a traffic cop, they run over each other," he says. Smith goes around the virtual table; each participant is invited to speak for 30 seconds and no one can interrupt. "Make it clear to everyone that they can 'pass' when their name is called," Smith advises. But, he cautions, silence doesn't necessarily mean someone is finished. "Ask them explicitly, 'Anything else?'" Smith prefers to go around the "table" twice so participants who passed during the first round have an opportunity to speak. The result is that, with six teleconference participants, everyone says something at least every three minutes.

Smith, too, assumes that participants will become distracted after the third presentation slide, and recommends interactive behavior such as asking questions, polls and pausing the presentation for a quick brainstorming activity. "If you're using a meeting tool that allows the presenter to control the slide set, it's harder for others to multitask without getting lost later on," he adds.

Mittleman also advises that it's important to get people to focus during transitions from one meeting part to another, or you'll lose them. "If you have a video channel, this (counterintuitively) is the most important time to be using it," he says. "Create a scoreboard or dashboard so everyone can see where you are in the agenda, who is up, what is coming next. Also, they should be able to see who is at the meeting."

It is much easier to brainstorm than to make a decision virtually. "When you are brainstorming everyone gets to contribute ideas,"

Mittleman explains. "When you are consolidating ideas, some ideas get swept off the table. People don't like to give up their favorite ideas. They like it even less virtually." That's because people have no sense that everyone else understands their pet idea, and no perception that their own interests were accommodated. Mittleman advises. "This is why many virtual decision making meetings fail. It is not enough to lead a group through a vote; it is vital to lead them through buy-in to the results of that vote. Buy-in requires a sense of being heard and a sense that one's interests have been accommodated-or at least understood."

It's a "Mute" Point

The one issue on which people disagree is the Mute button. Most meeting participants wish others would press Mute on their phones to reduce background noise and to improve sound quality-but that opinion isn't universal.

Settle-Murphy urges people to stay off mute. Doing so, she says, allows people to readily participate in verbal conversation without a pause, and gives the meeting facilitator a greater sense of whether people are engaged and alert, she says.

Sarah Churton, general manager of SureSlim, is among those who favor using Mute when the participant isn't speaking. "I came from a business that would regularly teleconference 20+ locations where managers and teams were in an open plan environment," she explains. "You can only imagine what it was like when only half of the participants used the Mute button as requested."

Whichever answer you choose, be sure that it's included in the ground rules-and be prepared to remind participants.

Stay Conscious of Time Zones

Meeting participants aren't always in the same time zone; when you plan a meeting, take their time of day into account.

Kevin Mackie, director of software development at Oracle, says a lack of colocation isn't nearly as important as the ability to meet during people's normal working hours. "Large differences in time zones are much more of an obstacle to collaborative development than not being in the same room," he says.

It isn't simply an issue of scheduling a conference call for 9:00 a.m. in New York (thus 6:00 a.m. in California). Mann advises meeting organizers to be aware of other time-of-day impacts, such as crossing over a lunch hour, keeping someone from leaving work on time or having to arrive extra early. "If these are the only options, work with the people that need to leave early so that their topics are covered, and if someone needs to work across the lunch hour to attend your meeting, provide lunch for them," he says.

Another option, says Howard Lichtman, president of [The Human Productivity Lab](#) and the author of Telepresence, Effective Visual Collaboration and the Future of Global Business at the Speed of Light, is to alternate who stays up late when meeting with people in distant lands. "Alternate for fairness," he says. And be flexible.

Technology Can Help. But Use It for Good, Not for Evil.

You've undoubtedly discovered the myriad tools that can help moderate meetings and share materials. Choosing the right one for the task isn't necessarily easy.

Managers should be clear about what they're trying to accomplish in the meeting and how information may flow before deciding on the software to use, says Mittleman. For example:

- Live Meeting: Best for a presentation where one person will speak to a group with occasional participant questions.
- Group Support System (GSS): Best for problem solving or decision making where a team of people will work on a problem and come to resolution.
- Collaborative Document-Building Tools: Tools such as Google Docs are best for a work product execution meeting where a team will work at developing a deliverable.

Settle-Murphy agrees that technology must match the objectives. She says, "Select technology tools that best support different kinds of virtual meetings: communication, data gathering, idea generation, team building, problem solving, decision making." Technology should assist in meeting effectiveness, not drive the meeting process. "Don't become enamored of glitzy features that may contribute little to meeting your objectives. Design your agenda first," she says.

An online meeting moderator needs to know how to:

- Put everyone on mute, and toggle mute off.
- Post questions using the Web collaboration software.
- Retrieve responses and questions from the Web collaboration software.
- Transfer control to another participant and get control back.

- Change the window being shown.

Upgrading your whiteboard can also help. "Most Web conferencing and data collaboration applications come with a whiteboard tool, but they all require you to use a mouse," Lichtman says. "If you are in a field that requires a lot of hand-generated graphics, like networking, consider getting a rear-projection SmartBoard, tablet PC or Wacom tablet that will allow you to whiteboard with the same degree of control that you would get with a regular whiteboard. Your colleagues, partners and prospective clients will thank you!"

Technology is great-when it works. Test the technology an hour before the meeting, Mittleman adds. Every time, he insists, no matter how routine. Then set things up for real a few minutes early. And, he says, "Have a technology backup plan. Think through carefully what you will do if the virtual technology fails. Will you postpone the meeting, or hold it anyway with backup technology? Don't make this decision on the fly; already know."

The challenge for presenters in remote meetings is to move beyond a simple analog of showing slides on a projection screen in front of a room and more fully involve the remote participants in true collaboration, says Molay. "Web conferencing features have made this easier with functionality suited to the task. Make use of things such as file sharing, interactive text chat, polling, whiteboards and cobrowsing to take participants to Web applications of interest."

Author's Note: When I began asking questions about this topic, I never imagined it would generate as many responses as it did-in a mere 24 hours. For space reasons, I had to leave out plenty more pet peeves (as well as their solutions), such as "Don't drag the speakerphone across the table, as it makes a terrible noise to people on the phone. Lift it, please."

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