Making a success of virtual meetings

… and 20 things to think about to make them even better!

Institute of Healthcare Management

'Meetings are what you do… so take them seriously. Make them fun, make them interesting and now we must learn to do them differently…'

We will look back on the Covid period in our history as a time of devastation. We will, rightly, remember it as a time of great sorrow, loss and grief.

However, it has also been a period of great change, innovation and doing things differently. If any good can come of CV-19, one of the effects has been on how we work together and meet.

NHS organisations are shifting towards virtual meetings, teleconferencing and webinars.

Since the development of these technologies the NHS has been a slow adopter but two forces may hasten their wider daily use.

The first, of course, is CV-19 where social distancing regulations oblige NHS managers and clinicians to find new ways of working.

Second, a policy that has been eclipsed by the CoronaVirus; the need for the NHS to reduce its carbon footprint.

The value of remote technologies, once viewed with suspicion, have proved their worth and the NHS looks ready to take them on as part of the day-to-day skills of management.

Virtual collaboration will redefine the NHS, its services and how we work. We've learned overcoming the awkwardness of sitting in front of a screen, who hasn't been late, joining a meeting, reluctant to confess we were defeated by the technology!

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Now, Zoom, Teams, Google Hangouts, GotoMeet and a host of other software companies are helping us to work remotely, linking our kitchen table to anywhere around the world and of course, the office!

To get the best from the tech there are some new rules to follow, some changes in practice and fresh ideas to make meetings on the screen, work as well, perhaps better, that face to face!

Changing how we think about meetings.

Face to face meetings, were where the serious business took place, Now a lot of it has moved to the screen we'll need a different approach. It's easy to send an email, announce a Zoom, or Team meeting and corral a group to the screen.

Virtual collaboration will redefine the NHS

Maybe it's too easy?

Time is money, so ask yourself, is the meeting necessary and is it too long?

Take a moment and calculate the cost of a meeting.
Take a figure for salaries, calculate an 'hourly-cost' rate.
You'll be astounded!

Write it across a large sheet of paper and Blu-Tac it to the wall behind you.

Remind everyone;

> *"This what this meeting is costing, so make it an investment!"*

This is why preparing for video meetings is important, if not more, than for face2face.

Does everyone know how to work the technology?

You wouldn't dream of having a meeting without tables and chairs. Now, the vital piece of kit is the software.

Waiting for people to figure out how to login wastes time and is embarrassing for everyone.

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Over time, provided you stick to one piece of software, people should get the hang of it.

Prepare a simple crib sheet for new joiners, to let them know how to get into a meeting.

If you're chairing a meeting, get familiar with how to use a virtual white board, present slides and show on-screen notes.

It's OK not to know these things. It is not OK, not to have had a practice and a dry run. Be clear, this is the new normal.

Some software allows you to use background slides. Pictures of beaches and sunlit woodlands may be OK for talking with friends and family, not for business… they betray the fact, you'd rather be on a beach than in a meeting!

It's OK not to know these things. It is not OK, not to have had a practice and a dry run.

If you need to obscure the background, see if there is a 'blur' facility or pick a plain colour.

Make sure there is nothing embarrassing in the background, piles of clothes, family pictures or the *wrong* books on the shelf!

Position the web-cam, or the camera on the laptop, at eye level. Avoid looking down, into the screen, it looks like a leer and please don't give the world a picture of 'up-your-nostrils'… it's not a good look.

Lighting; get the light source behind the camera.

That usually means, if you can, facing a window. A light behind you will throw your face into silhouette and we won't be able to see your winning smile, and you'll look like you belong on CrimeWatch.

If you can, push the camera away from you, to at least arms length. Try and get the type of framing you see on the TV news. It is easier to look at an image that isn't crowded onto the screen.

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The general advice is a virtual meeting should not last longer than 45 minutes, max and half that is preferable.

Studies have shown that however tiring face2face meetings are, virtual meetings are even more so. Looking at the screen, is wearing.

The general advice is a virtual meeting should not last longer than 45 minutes, max and half that is preferable.

That means getting prepared.

Pay close attention to the agenda. Set time limits for each item and show it on the agenda… so everyone knows what to expect.

Make sure people presenting papers are properly prepared. When their item comes up, they know how to load PowerPoint, graphs or film-clips onto the screen.

If they can't do it, make sure you have the papers in advance and make it a job for a tech-savvy volunteer, to load up the material and display it at the right time.

The real enemy of a virtual meeting is boredom or lack of engagement.

In a f2f meeting, there's no nodding off! In a virtual meeting people can click-off their microphone and get busy with their Ocado order, or answering emails.

Make a big effort to make meetings as interactive as possible. Use the software to create opportunities for voting, sharing notes, live comments and white-boards for thoughts and ideas that occur during the meeting.

If you can, ban muting-microphones and clicking-off video, make it clear from the start that this is a virtual meeting but you are expecting real participation.

If a participant is quiet, ask them for an opinion, be inclusive look for comments and ideas, ask spontaneous questions… it keeps people on their toes and 'on-it'.

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Get serious about agendas. For all meetings, agendas are a road map. Don't take them lightly. For virtual meetings they are even more important. Plan them properly and stick to them.

They are even more important in virtual meetings. They help us to stick to time, stay focussed and get the meeting's work done.

Make sure the ideas and comments are collated and encourage people to download them from the 'share screen'.

Ensure all the numbers and reports are in place and sent out with the agenda.

There is nothing worse than having to shelve a decision because all the information is not in place.

It is a gift for the undecided and the malcontents;

> *"How can I be expected to make a decision without all the information at my finger tips".*

You don't want to hear that.

Set a cut-off date for all agenda documents to be received and assembled.

Electronic conferencing is not an excuse for winging-it not getting organised and not getting things done.

Where there is no direct eye contact and *butting-in* is difficult, the quality of the chair is very important. Keep an eye on who want's to speak, who hasn't spoken and who is hogging the screen.

It is easy to wander off the topic. Be prepared to say;

> *'I know that is interesting and a topic we need to come back to. But, right now we have a lot to get through and we have to concentrate on this item."*

Beware of the agenda-benders!

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If the agenda is complicated and time is tight, be prepared to set a time scale for each of the items; fifteen minutes for this and twenty minutes for that.

That way the items at the end of the agenda will receive a fair hearing.

Electronic conferencing is not an excuse for winging-it, not getting organised and not getting things done…

Nothing happens after the meeting?

Click the big red button, to leave the meeting… job done. Er… no!

Think of a meeting as producing a blue-print for what happens next. Some meeting software allows you to record the meeting. That might be helpful.

Otherwise keep a note of the action items. Most meeting software has a white-board facility that will let you note action items on the screen and who is responsible. It's usually possible for everyone to download the notes…or for the chair to circulate.

Be sure that action items are allocated and the people concerned know they are accountable and agree the task and the time scales.

There is nothing worse than turning up at the next meeting to find things haven't been done. Don't be afraid to set interim benchmarks and call people to see how they are getting on. Will they complete their part of the task by the agreed deadline. Do they need some help?

Real meetings are real work, virtual meetings are extra effort, plus real work.

Make meetings work; tell people you are looking for decisions, not delay. Moving forward, not staying still. Innovation, good ideas and solutions.

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20 things to think about…

… what to wear? Virtual meetings are business, so dress for business. You'll be seen on a screen, avoid fussy or busy patterns, dangly earrings or flashy jewellery… it is distracting.

… unless there is a lot of background noise try to avoid earphones if you can, it looks 'nerdy'.

… can you work in a room with a carpet and curtains, it cuts out that hollow, echoey sound that's hard to listen to.

… frame your shot. Make sure your eyes are 1/3 the way down the screen. Avoid too much headroom, which will make you lose authority. When you are speaking, look straight into the webcam. If you look down, you'll appear condescending. If you look up, you'll look bewildered!

… try being a little more animated than normal, use facial and hand gestures and give visual clues, nodding, smiling, sitting back to listen and leaning forward with your mouth open to show you want to speak.

… unless you can't avoid it don't use a smart phone and if you can't, never hand-hold it, a tiny shake will amplify on bigger screens. Prop it up somewhere safe, so you can be hands-free to make notes.

… try making the conference-software application less than full-screen and move it as near to the camera lens as you can. That way you'll look like you are looking directly at camera, instead of looking at the bottom, middle or left and right of the screen.

… be sure to turn-off updates, mail and all applications, that way you'll have more bandwidth and the screen image will be better. Turn-off other household wifi applications.

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… if your wifi isn't great, connect to the router with an ethernet cable. Ask a passing 11 year old, how!

… allow time for people to join the meeting, sort out their inevitable technical problems and get organised. Call it networking-time or just a gossip and a catch up. Let people test their microphones, lighting and fiddle about. Start with introductions, or 'how have you been', get people talking and making sure the kit works.

.. being clear about the purpose of the meeting; 'this meeting is to review, to decide, to understand, to conclude…'

… do you need everyone, all the time? If part of the meeting doesn't need everyone to participate, say so and let them drop out.

… be clear about timing; agenda items will have a time slot and the meeting will start on time and finish at…

… how will the chair make clear who they want to speak and when to stop. Agree a few simple hand signals to keep things running smoothly.

… be as interactive as possible, ask questions. Give people time to collect their thoughts. If you are using Zoom you can create breakout groups for people to discuss issues and then report back.

… try to divide the meeting into 10-15minute segments and its a good idea to allow a comfort break, or time for a gossip and a brew. Do what those old-fashioned meetings used to do!

… virtual meetings lack the social norms and the clues we use in f2f meetings. Don't assume understanding or consent. Be clear about action items and get explicit agreement about who will do what, by when.

… if it's a large group it might be better to ask everyone to mute their microphone to cut out background noise. Be sure they know how to turn it back on!

… expect some chaos; connections will drop out, people talking over each other, time lag… it happens, get over it!

… remember; background, lighting and eye-line.

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… this is the future, get used to it, get good at it and the future will be yours!

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