Managing LARGE VIRTUAL MEETINGS

Have a clear purpose and agenda

- Well in advance of the meeting identify the specific outcomes you are aiming to achieve
- Design the processes and timings for each portion of the meeting to achieve those outcomes
- Be creative about how the participants can make use of a "virtue" of the virtual technology
- Allow extra time for the transitions and logistics between portions (sessions) of the meeting
- Identify clearly what specific technologies are needed to support each presentation and activity
- Bear in mind how difficult it is for passive participants to focus for long periods in virtual meetings
- Plan plenty of 'stretch breaks' for participants (and presenters) to increase effectiveness
- Ensure presentations do not have too many slides - break them into manageable chunks
- Distribute presentations in advance - if not to everyone, make sure each location has at least one copy
- Document the equipment needed and technical support person for each meeting location

Build a facilitation team who are clear about their roles

- Identify a 'lead studio' to coordinate large meeting facilitation and manage the invitations and connection problems. In the lead studio, the meeting facilitator will require at least 3 additional contact persons, with access to keyboards, whose role is to receive instant feedback or issue instant invitations. Ensure that everyone knows who these key contacts are.
- Each location will need two key roles;
  - I. a *"studio leader"* to facilitate the meeting, manage attendance and manage any connection problems. This person has a laptop with 'instant messaging' software available.
  - II. a *"technology leader"* who has a laptop connected to projector and who will, before the day, provide the software training to all the presenters/helpers and give them a document with basic instructions for screen maximizing, presentation sharing, etc.
- If you are doing participative work using collaboration software, you will also need one person with access to computer keyboard input per three meeting contributors.

Invest in set-up time

- Book video conferencing studio time well in advance and aim to group most attendees in a reasonable number of locations (ideally six locations maximum). Having more than six video conferencing studios or mixing video conferencing and audio conferencing often creates serious technical problems.
- Ask all audio users to connect individually to the "video bridge" rather than using a conference phone in one of the video conferencing studios for better audio quality at all locations
- Avoid low bandwidth sites (small remote sites). They affect both video transmission and instant meeting performance for the entire group
- Ideally have in advance all participants' names, by studio location – digital images of presenters can help
- Set the room up so that the audio speakers are pointed away from primary microphones
- On the day of the meeting
  - I. Get all "studio leaders" connected in advance and ask them to stay connected for the meeting
  - II. Check that all leaders are clear about the instructions and know how to invite people in
  - III. Share documents that will be used (or referenced) during the meeting
  - IV. Agree on the process for taking control of a shared document
  - V. Agree on the process for giving back control of a document
  - VI. If using *NetMeeting* - also ensure they know how to use the whiteboard for brainstorming
- Allow (but do not announce in the agenda) 15-minutes contingency at the beginning of each meeting block (2 or 3 hours) to allow for connections management. Arrange for the 'studio leaders' to be present for this set-up period

Make sure people are 'emotionally connected' before starting the work

- Let people know who is participating in the call
- Let each location speak (ensure they are not muted while speaking), and enable everybody to see them
- Take the time out to make sure participants feel they are fully present and can be seen and heard
- If possible, let participants speak for themselves so they are present as people, not places or studios
- Announce when individuals join and leave the session (this is easier if participants are on time)
- Plan a process connected to the purpose of the meeting to make it engaging for attendees (break the ice)
- Be clear about the various roles and ask people not to touch buttons if they do not have a role
- Develop protocols and/or ground rules together if you think it will help build collaborative relationships

Take your time with presentations

- There may be no need to use the software from the main location to show "remote" presentations if every location has a copy (sometimes software can be slow in slide transitions)
- Presenters need to announce each slide transition clearly before presenting slide content
- Allow a brief pause between slides, as it can take time to load pages at remote locations

- Place microphones close to participants and ask participants to speak clearly, slowly and loud. Adjust cameras to ensure that presenters and participants can be seen across the video conference connection
- Ensure that each person talking states their name and location first - follow the *one at a time* discipline carefully - track who needs to speak next (use the "on-deck" principle)
- Ensure that every participating location mutes their microphone(s) when not talking

Allow time for conversation and influence

- Check in with people regularly and ask studio leaders to watch for visual clues. Where people cannot be seen, ask for feedback at regular intervals
- After each formal presentation is delivered, allow a little time for stress reduction by encouraging people in each location to engage in some casual conversation among themselves
- Consider using "instant messaging" to send questions to the presenter's assistant(s)
- Have someone to work with the presenter to help sort questions during periods when participants are engaged in activities connected to the presentation
- Have clear instructions included in the presentation which can be displayed for everyone to see
- Keep the connections "active" so you do not have to set things up again
- Agree on timings and synchronize remote location clocks - use the laptop (network) time
- All "listening" rooms should be set to mute mode to improve presentation sound quality
- Check at regular intervals to ensure that things are going on schedule in each location

Capture the work

- If necessary video record and audio record presentations so they can be easily transcribed
- Have someone document the conversations and actions for the record
- Use "instant messaging" for live capturing of commitments and sharing of reference documents
- When sharing remote work use shared electronic documents rather than flipcharts

Be prepared for the process to take longer

- Activities take longer when people are just learning to use the various technologies
- Remind all participants to be patient with new technology and/or new users
- If it is going on long enough for people to need to snack, be careful about packaging noise in the location where microphones are turned on (crispy/crunchy foods can be very distracting)

Keep things "interesting" (interactive) for participants

- Listening to one person speak or watching one screen for a long time can make it difficult to keep focused
- Move the conversation around to other locations, and let people talk within locations before sharing with other locations (a little like breaking into small groups within a large group)
- Use more than one color and include some visuals or multi-media content to maintain interest

Close with summary and reflection

- Summarize commitments (if possible allow each location to state their own)
- Allow and/or encourage participants to voice any immediate comments or reflections
- Invite immediate feedback, further reflection, and suggestions for process improvement

Reminders for virtual meeting planners

- Shouting at the technology doesn't make it work any better
- Have a back-up plan if the technology fails (through no fault of anyone there (perhaps a power black-out)
- Have a back-up plan (at least in your mind) of what changes you can make to the schedule or process if people speak for longer than scheduled. Understand what the overall consequences will be.
- Be prepared to use mobile phones to connect off line to each other away from the main room
- Remember that virtual meetings likely require more preparation than a face-to-face meeting by virtue of sorting out all of the technology and becoming proficient with it
- Large virtual meetings can easily be more labor intensive in facilitation and back-up staff than having, for example, 150 people in one room
- Large virtual meetings can cost as much as a one-day meeting with all people together even with flights and hotels. An upside is that people can go home at the end of the day to their own beds with no jet-lag

Selecting the "best" technology for the meeting

There are many software packages that can be used for collaboration. Each one has strengths and weaknesses. Work with whatever application(s) you are most comfortable using and that you thoroughly understand.

In preparation for a very large virtual meeting, you may need to spend many hours just practicing with the software. If you can't break it easily, then you can be fairly confident it will be OK on your real meeting day. Don't go for over-sophistication just because it looks impressive. Go for simple, easy to use software. Beware the sales person who sells you the world but is nowhere to be seen when the application crashes! Virtual meetings are not a competition to show off the fanciest technology - they are places of work.

