



Techniques for Facilitating Virtual Meetings

Planning a virtual meeting? This document will walk you through strategies that work well and help you attain your meeting objectives. Leading an effective meeting is both an art and a science. A comprehensive guide, *Introduction to Planning and Facilitating Effective Meetings*, is available at <https://coast.noaa.gov/digitalcoast/training/effective-meetings.html>. While many techniques apply to both virtual and in-person meetings, a virtual meeting presents special challenges, with phone or computer-based participants more apt to become distracted. In addition to the meeting design and delivery techniques found in the online publication, the following practices are helpful when planning virtual meetings.

BEFORE THE MEETING

- Determine why the meeting is necessary and who needs to participate.
 - Establish objectives and develop an agenda with opportunities for participants to engage.
 - Work with the presenters to prepare materials and conduct planning-team dry runs.
 - Share objectives and the agenda with participants before the meeting.
 - Keep meetings less than an hour if possible; several short meetings are generally better than one long one.
 - Develop engaging materials. Sneak in some surprises to keep audience interested.
 - Use pictures or slides (maybe even music!) for breaks.
 - Have a timer or clock to post for breaks and small-group work.
 - Place ground rules in a chat box for all to see.
 - Send connection information and reading materials a week in advance and presentations or agendas 1-2 days in advance, and again just before the meeting.
 - Keep time zones in mind.
 - Choose technology based on meeting objectives and participant needs (see details below).
 - To minimize phone call interruptions, set up the profile of your teleconference account so that the phone beeps, or is silent, when callers join or leave instead of making an announcement.
 - Mute all the lines using your teleconference profile.
 - Consider audio technology to help participants hear clearly (e.g., a high quality head set, microphone, or speaker).
 - Choose the appropriate Web-based software to assist with the meeting objectives.
- Consider these questions:
1. Do you need the meeting recorded?
 2. Do you want the audience to interact primarily by phone/VOIP or chat function?
 3. Will you have multiple presenters in various locations?

To determine the best program for your purposes see these comparisons:

- www.socialbrite.org/2011/01/19/comparison-top-web-conferencing-services
- <http://webconferencing-test.com>
- <http://web-conferencing-services.toptenreviews.com>
- http://en.wikipedia.org/wiki/Comparison_of_web_conferencing_software

DURING THE MEETING

- Speakers should post a photo or use a webcam.
- When requesting audience feedback, ask participants to virtually raise their hands or use the chat function to respond to avoid several responses at once.
- Call on participants using an organizing approach such as a round-robin or by region, program, project, division, etc.
- Use polls to ask participants questions about content and process.
- If the meeting room has several participants and additional participants are on the phone, all speakers in the room should use a microphone so phone participants can hear everyone.
- Work with a co-facilitator in each gathering place to monitor technology, move the microphones, scribe notes, etc.

SUGGESTED GROUND RULES FOR ALL PARTICIPANTS

- Turn away from email for the short duration of the meeting.
- Say your name before you speak.
- Remember to use your mute/unmute button.
- Do not put your call on hold; it will broadcast your phone system's background music.
- Do not conduct side conversations or make inside jokes.
- Speak loudly and clearly.

CUSTOMIZE THE VIRTUAL MEETING TO MEET OBJECTIVES

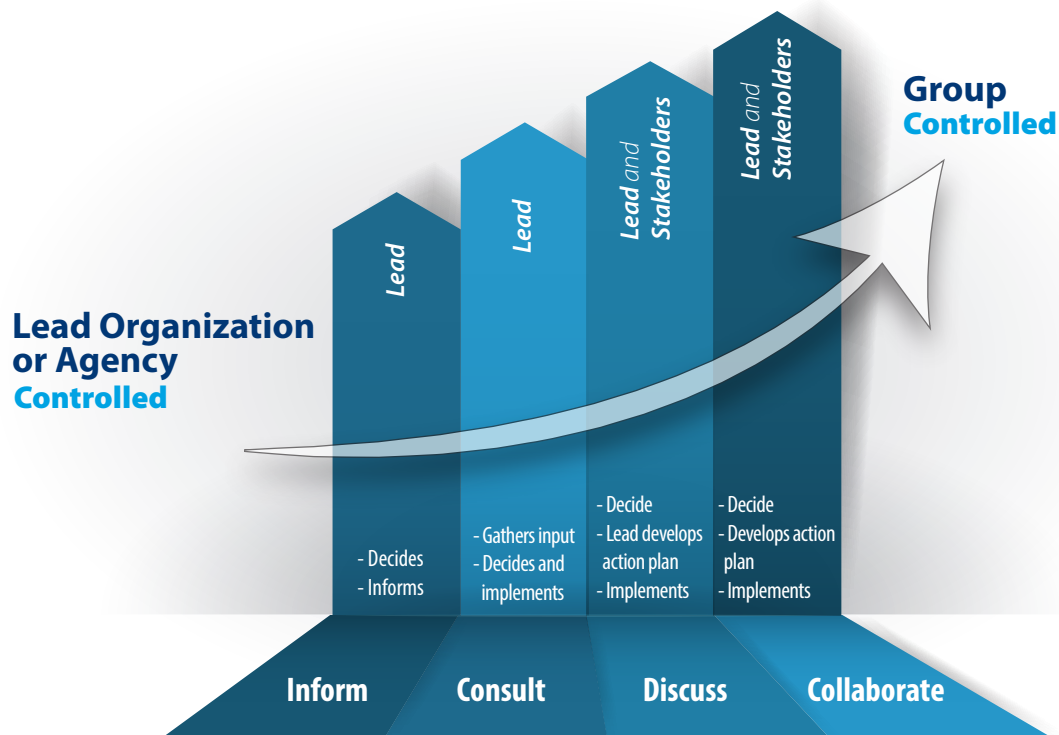
Different meeting objectives require different approaches. Some meetings require a good deal of engagement and collaboration, while others require none. In addition to using the general techniques listed above, select others to customize the meeting to meet specific objectives. The chart below can be used to determine the objective, and inform how involved the participants need to be in the meeting.

Inform: Participants will be informed about a policy, decision, issue, product, tool, or service. Communication is primarily one way. One or more speakers will be informing the audience about a topic.

Consult: Meeting conveners will consult with selected participants about a modification, resolution, policy, issue, product, tool, or service. The conveners may or may not use the input from participants.

Discuss: Meeting conveners will discuss options for resolution or development with participants and modify approaches accordingly.

Collaborate: Meeting conveners will facilitate a discussion with a group of selected participants to provide an opportunity for them to collaborate and make resolutions, modifications, or developments together. All participants agree to forgo their positions for a decision that advances the common good.



TECHNIQUES BY MEETING OBJECTIVE

1. INFORM

Meeting Objective: Participants will be informed about a policy, decision, issue, product, tool, or service. Communication is primarily one way. One or more speakers will be informing the audience about a topic.

Ideal Number of Participants: 5 to 100s

(Expect approximately 40% of registrants to actually call in unless it is a hot issue with limited opportunities to hear the information.)

Techniques that work to “Inform”

(In addition to the common techniques):

- If possible, develop a video that gives all the information, and share it widely with the audience members to watch at their leisure.
- If a meeting is necessary, share documents and presentations with a video call.
- Use a webcam for the speakers to help participants stay engaged throughout the presentation.
- Use chat boxes or polls to ask questions and engage participants. Several boxes and questions can be functional at once, which compels people to read and stay caught up.
- Ask people to voluntarily chat their names and affiliations as an introduction.

2. CONSULT

Meeting Objective: Meeting conveners will consult with selected participants about a modification, resolution, policy, issue, product, tool, or service. The conveners may or may not use the input from participants.

Ideal Number of Participants: 5 to 100s

(Expect that only 40% of registered participants will actually call in to the meeting.)

Techniques to “Consult” (In addition to the common practices and “Inform” techniques):

- Show the layout of the website, particularly the mute and “raise hand” functions.
- Use polling to obtain participant input.
- Use a virtual whiteboard to capture key points, much like flip charts.
- If there is verbal feedback, type live notes so participants can see their feedback being captured.

3. DISCUSS

Meeting Objective: Meeting conveners will discuss options for resolution or development with participants and modify approaches accordingly.

Ideal Number of Participants: Up to 25

Techniques that work for “Discuss”

(In addition to previous techniques):

- Introduce everyone on the call, or ask them to chat their affiliation.
- Use a timer to keep discussion on time and focused; some websites can make this visible.
- Post participant photos (if no webcams) during introductions.
- Type live notes that one or more people can add to during the event.
- Conduct shared, real-time document collaboration.
- Use polling at decision points to move the discussion along.

4. COLLABORATE

Meeting Objective: Meeting conveners will facilitate a discussion with a group of selected participants to provide an opportunity for them to collaborate and make resolutions, modifications, or developments together. All participants agree to forgo their positions for a decision that advances the common good.

Ideal Number of Participants: 8 to 12

(Group will meet several times to collaborate, so building relationships is important to the process.)

Techniques to “Collaborate”

(In addition to the previous techniques):

- Employ video calling for engagement and to see body language.
- Conduct shared, real-time document collaboration.
- Use a virtual whiteboard for note taking and group documentation.
- Use a timer before starting, during breaks, and during question and answer time.
- If appropriate, incorporate music or a video.
- Employ “chat” as a way to get discussion started, and then focus on points that come up multiple times.
- Use a round-robin to answer questions and ensure everyone has an opportunity to give input.
- Type live notes that one or more people can add to during the event.
- Use the attendee list for a round-robin so participants know when their turn is coming.