



How to conduct virtual meetings

An (incomplete) checklist

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The Corona Virus has caused a boom in virtual meetings. Some have incorporated virtual meetings into their everyday life for years, others are just beginning to experiment with the technical possibilities. Even though the technical side is crucial, we should focus on integrating the people into the process.

In virtual meetings attendees tend to be quite disciplined and discussions on a factual level seem to be easier. The downside is that the virtual space lacks some components of a face-to-face meeting, e.g. facial expressions – and that makes them strenuous. However, in time of crisis, it is important to keep a positive energy balance for the team. The following 17 tips summarize the most important points needed to keep the social group process lively and interactive also in virtual meetings.

Try out what fits for you!



Basic rules:

Use online tools of highest quality and make sure that everyone has a good headset or loudspeaker/speakerphone quality. Do the utmost to reduce background noises and ensure that the connection is stable. This may sound basic, but will lead to less stress within the group. If not, you will end up using more of your precious time for sorting out technical flaws, than for important meeting topics.

Be as patient with your colleagues as you are with your computer! It takes time and much attention until hard- and software work well – don't forget that people need time to learn new programmes and procedures. Sometimes a telephone conference is better than a video conference.

Home-Office needs practice and time to adapt to - allocate time for these topics. Virtual meetings where such topics are officially discussed will build trust and the willingness of all to cooperate.

Take yourself seriously when conducting a virtual meeting. It's not only about the others not seeing you in your pyjama. It's about conveying your sovereignty and assertiveness also in a virtual meeting.

Before the meeting, test whether everything is in place and works. Take adequate time before the meeting to test whether the online tools function, your headset is at hand and you have something to drink nearby. Try your mute-function, with which you can turn on/off your microphone. It adds tremendously to the quality of your meeting

if only the microphone of the speaker is on and all others are muted – this ensures the least of side noises.

Conducting virtual meetings is hard work. Switching everything to “virtual” is easier said than done. Especially at the beginning, plan more time for preparation. You need a short, concise agenda, active moderation integrating all attendees and good documentation, accessible for every participant.

Practice active listening. Acoustic signals are significant in virtual meetings. Depending on which type of person you are – visual, auditory, kinesthetic – following the conversation will require less or more effort. Thus, plan time to recover.

Following every point of the agenda, summarize the content and the result(s) comprehensively. In the course of discussions, the end result is often lost. It takes the least effort, if the group together summarizes the result(s) in writing.

Address disturbances. Be it a bad connection, somebody talking too quietly, or you do not agree to what is being said - address it. In a virtual room, one cannot tell whether someone is frowning or looks unhappy. Agree on a signal for “virtual frowning” – this will ensure that important objections surface in time.

Ask for feedback. Most online tools for virtual meetings provide chatrooms for written communication. Ask for written feedback – e.g. yes or no - when needed. This will give you an overview on the reaction of your colleagues. In video-conferences you can also work with colour cards. Green card means: I endorse. Red card: I am against.



Agree on starting time, breaks and ending time, and stick to them.

For many people, virtual meetings are more exhausting than face-to-face meetings, so do schedule enough breaks. Work maximum 90 minutes at a time. Mutually agree on the duration of breaks. If you consider this, then your colleagues will be able to attend the meeting more energetically.

The closing: how was this virtual meeting for me? Take time for a flash-session, where everyone subjectively states how this meeting felt for him- or herself. This feedback helps you to learn – e.g. what needs to be improved technically, in the way we conduct our discussions? Decide how you can work best with each other.

Boosts for interaction:

Only conduct meetings when they are necessary, and if so, prepare!

This rule counts for all meetings, but is especially true for virtual meetings, as they require more energy. As a group, clarify which topics are important and need to be on the agenda. Apply the (project) management procedures familiar to the group – do not introduce new methods which will overwhelm everyone. Do not ask colleagues to attend for whom the topic is irrelevant.

Do not overload the agenda. It is better to conduct more meetings with short agendas. When you cram in too much, you risk that the subjects that come last do not receive the same attention as those at the beginning. Clarify the purpose of each topic – is it for information, discussion, reflection, negotiation, decision? Virtual space lends itself well for informing on subjects, but leading a controversial discussion is far more challenging.

Ensure that each attendee can speak at least once per meeting.

In a virtual meeting it is harder to make oneself heard, thus the frequent speakers will dominate. Posing a question and then making a round where each attendee can voice their opinion, will ensure participation. When people of diverse educational background meet, it is important to consider that the chosen language and terminology is understood by everyone. This increases trust!



Rotate the moderation of virtual meetings. Moderating a meeting is a demanding job and a service to the group. Moderating a virtual meeting has nothing to do with hierarchy. The moderator of a virtual meeting must be very attentive to the subtle signals from the group, which show what people really feel. Delegate the moderation, if you as the formal leader want to discuss a topic which is important to you. That way you can concentrate on the content of the discussion, whilst someone else is taking care of the group process.

Virtual arguing is harder than face-to-face. In the virtual space we often use harsher words, feel less understood and in general there is more room for misunderstandings. If you notice that a conflict is on the horizon, interrupt the factual discussion and commonly agree on a way forward.

Together observe what works well in a meeting and what doesn't. Sharpen your awareness and talk about it. Be happy about the things that work well. Keep an eye on troubles and try to change them. If you can openly exchange your experiences, you can all learn from them.

Create a positive closing. Neurological research has shown that the closing is important for the perception of the entire meeting. If you want the participants to joyfully continue attending virtual meetings, then take care of a positive closing. You can e.g. introduce a flash-round where everyone states what he/she is currently grateful for. Try it. Good mood guaranteed!

Meeting-Rules for everyone:

1. Collectively agree that only one person talks at a time;
2. If you are not talking, mute your microphone;
3. Start the meeting with a short round of arrival, where everyone introduces themselves
4. Speak clearly, slowly, articulate well;
5. Listen actively;
6. Ensure that each attendee can speak at least once per meeting
7. Address any kind of disturbance immediately;
8. Agree that only the current meeting is visible on the PC-screen, all other windows remain closed;
9. Rotate the moderation of your virtual meetings;
10. If you always run short of time, allocate someone as time-keeper;
11. Have a good break after max. 90 minutes;
12. In case of arising conflict end the meeting and have a bilateral talk to your contestant via phone;
13. Put the results of the meeting in writing and make them accessible to all participants.



Sample agenda:

- *Words of welcome*
- *Every participant checks in, stating their name*
- Does the technical infrastructure work?
- Recap of our common meeting-rules (see above; need not be all rules, you can reiterate only part of the rules)
- *A short round with a personal question, e.g.: how am I doing in home office? How am I coping with this crisis?*
- Our topics for today: _____ Amendments? Anything we can leave out?
- Topic 1: _____
 - Short input
 - Discussion
 - Objections? Resistances? (write in chatroom)
 - *Summary of results: who does what by when? Where do we find the summary?*
- *Topic 2 + 3 + 4... proceed as with topic 1*
- *Closing:*
 - *Round of reflection:* how did I feel today at this team meeting? What went well? What should we improve?
 - *Or Flashlight-Round: I am grateful for ...*
- Thank you for the cooperation. Next virtual meeting will probably be about the topic _____. Next time AB moderates and XYZ is responsible for the minutes. See you again virtually on _____. Stay healthy!

How virtuality influences our way of working

Senses

Visual type: 40% of people

- Sees and remembers primarily colours and shapes
- Gesticulates a lot, takes big steps, talks fast

Auditive Type: 20% of people

- Sounds are very important for these people
- Pays attention to voices, volume, emphasis and wording

Kinesthetic Type: 40% of people

- Touching and feelings are important
- They like to touch something, follow their gut-feeling

From where do we retrieve information?

- Content of words 7%
- Intonation 38% (often distorted by bad transmission quality)
- Body language 55% (often badly visible due to camera quality and field of view)



Who and what is behind this checklist?

In this checklist I have assembled experiences from decades of group moderation, focussing on points that augment interaction and are easy to implement.

Theme-Centered Interaction (TCI) is my methodological basis – a participatory leadership method for groups and teams, based on the values of humanistic Psychology, taught by the Ruth Cohn Institute for TCI International.

My heartfelt thanks goes to Margarete Brudny-Klöppel, Thorsten Deutsch, Elisabeth Gores-Pieper, Annette Maerk-Schlaisich and Wolfgang Moser for their helpful input.

Links:

- > www.mehr-teamenergie.com
- > www.rci.at
- > www.ruth-cohn-institute.org



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