VIRTUAL COLLABORATION

When the
participants
cannot meet
physically.

By Henrik Horn Andersen,
hha@implement.dk,
Line Larsen, lla@implement.dk
and Cecilie Van Loon
Implement Consulting Group

More and more of our meetings are becoming fully or partially virtual, which demands different considerations and new skills compared to the traditional meetings and workshops. In this article, based on a chapter from our book on facilitation, we deep dive into the increasingly important topic of facilitating virtual meetings and give specific advice on how to create more impact in this type of meeting.

The ability to lead and facilitate virtual meetings has become a fact of life for many employees and managers today. Many organisations are global or spread across multiple geographical locations, so they need to be able to establish rapid contact with each other and run efficient working processes with people who are spread around the world – without surrendering quality. Video conferences, net meetings, webinars, Zoom, Skype, Skype for Business (previously Lync) etc. are more or less routine for employees in large organisations.[1]

Most enterprises have invested heavily in cost-effective virtual meeting systems. Virtual meetings are a way of saving both time and money – and the reduced travel is a bonus to their environmental conscience.

For example, one major financial group actively uses video conferences to reduce its negative impact on the environment. The group's teleconference rooms are designed for virtual meetings, where it can make big savings on trips because the meeting takes place between two or

more business units located in different countries. Meetings in the teleconference rooms can thus bring about a reduction in the group's CO_2 emissions.

Figure 1. **Virtual facilitation**

One company invested in 82 virtual teleconference rooms and analysed that in just the first year, this saved 6,063 tonnes of CO_2.[2] In the organisations that we work for, we are seeing more and more strategic decisions to move meetings and workshops to online platforms, increasing the need to acquire the skills to chair on this type of platform.

As a facilitator of virtual meetings, you can go a long way with the preparation tools described in articles and books on facilitation[3], but there are other points to note and skills to acquire if you are to lead virtual meetings and processes. Moving the physical interaction into a virtual space naturally raises challenges that are different from those we face when we are in the same physical room.[4]

The challenges are magnified in virtual meetings

Many of the traditional challenges you face in physical meeting processes grow bigger and change in character in the virtual setup, as you have no way of giving direct feedback, sensing the mood, gauging the energy in the room, seeing other people's facial expressions or having a more fluent dialogue.

It is as if our bodies have been put on standby when we take part in a video conference; the only thing that counts is talk, which is a challenge to communication. We see and experience this often in the organisations we work with. There is a strong focus on effective meetings that produce results and progress. Virtual meetings have arisen to enable us to communicate faster and more efficiently in spite of distance.
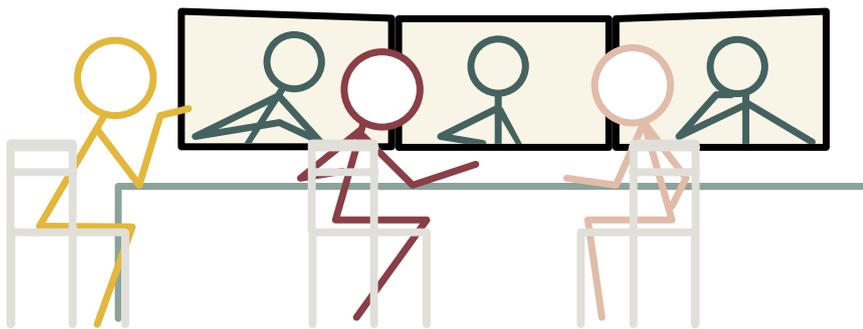
We see four specific dimensions that make the virtual meetings more complex to facilitate than physical meetings:

Physical distance: We are separated in time and space and cannot so easily decode body language.

Social distance: We do not have the same means of creating trust and intimacy before and after the meeting.

Cultural distance: We have different standards and traditions for communication.

Technological distance: Technology that fails; sound and images that do not render correctly.

These four dimensions mean that it is harder to:

- Agree and monitor expectations with the participants.

- Know when there is a need for further explanation or introduction to a given topic or subject.

- Address the substance of conflicts and react to them. We cannot sense each other in the same way or read body language. It can therefore be difficult to decode attitudes, and it takes

more talking to reach acceptance or consensus.

- Create an informal and secure environment to be in.

- Involve and engage everyone in the virtual meeting.

- Understand and react to the participants' different levels of experience and skills.

- Balance the time spent on the various agenda items when the participants are spread across different geographical locations. It is also harder to share the speaking time fairly among the participants. The chairperson's communication is crucial, and the participants who are brief and precise will have an advantage over those who express themselves at greater length.

Consider which meetings are suitable for the virtual format

Not all meetings are suited for the virtual format. Almost all forms of meetings and interactions can take place on the virtual platforms if trust and good relationships have already been established. Trust can best be established in physical meetings and by being together and interacting over an extended period. Once this trust has been established, it is easier to hold coordination and status meetings on a virtual platform.

Two American researchers point out that the durability of virtual teamworking depends on commitment and personal trust in the relationships, which will gradually drop if these relationships are not nurtured through physical meetings and social interaction. This is where the virtual technology falls short.[5]

Leading virtual meetings is more demanding

Everything we know about facilitation also applies to the virtual space. In process design, we normally work with three generic project phases: the "Before" phase (design), the "During" phase (facilitation) and the "After" phase (implementation and follow-up).

In a virtual context, this focus is turned upside down. At least 50% of the time should be centred around planning, 20% should be allocated to the actual meeting, and 30% should be allocated to following up in the "After" phase. This preparation means that the experience and the result will be much better. The participants will quite simply get more out of the time they invest.[6]
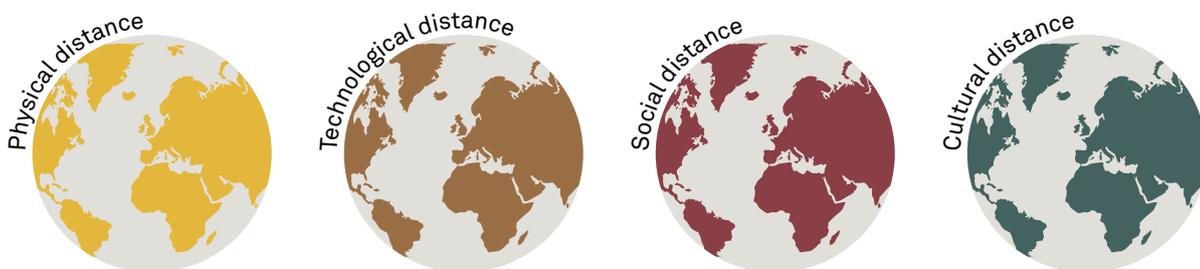

Figure 2. **Special characteristics of virtual meetingstation**

Pre-deliverables to your process

The equipment should be in place. In virtual meetings, as the model shows, a new component has been added – the technology. Before you think at all about the process, it is essential to ensure that the equipment works the way it should. This may seem obvious, but too many virtual meetings end up amputated because the technology has been overlooked.

The results could then be that the process is destroyed, and the meeting loses energy because the microphone does not work, the loudspeaker cannot be turned up enough, a plug-in needs to be installed, or the camera will not switch on. The technology is co-facilitator of your meeting, and, when it does not work, it can overshadow your entire process. There is no short cut here, so if you have an important meeting, you should be sure to make a test call with exactly the same equipment you intend to use so that you know how it works.

Make the meeting short

A fundamental rule for virtual meetings is that they should not exceed 90 minutes.[7] The absolute maximum amount of time you can assign to a virtual meeting is 90 minutes. The more participants there are, the less time you can go on. The participants' concentration span simply does not last longer than this in a virtual meeting, as these meetings are often more intensive and demand greater concentration and focus. Based on the overall objective, it is therefore vital to assess whether the meeting can usefully be split up, so that the virtual process design is made up of a series of smaller meetings over a longer period with small elements of the objective addressed each time.

This means that the facilitator has to consider:

1. How to limit objectives and deliverables.

2. How to sequence sub-elements.

3. How to keep the pot boiling between meetings.

Preparing the participants

As the limit on meeting time is much shorter than for physical meetings, it is a good idea to think about involving the participants in the content as much as possible ahead of the meeting. This will ensure that the actual meeting interaction is as productive as possible when people come together. This requires us as facilitators to ensure that all participants are at the same level of knowledge prior to the meeting and have read any preparatory material.

Professor and consultant Keith Ferrazzi suggests that we should set an ethical standard for preparation as quickly as possible so that it becomes a habit to turn up well prepared for the short virtual meetings and so that this is established as a social norm.[8] For the chair of video meetings, it is especially important to have formulated a clear objective for the meeting, as video meetings are not well suited for "loosely timed" processes.

Before
(50% of the time spent)
- What is the overall purpose of the meeting?
- Who are the relevant participants?
- Get input from the participants before the meeting.
- Agree on expectations as to subject matter, length, timing, roles etc.
- Plan the course of the meeting and the ground rules that are to apply, and communicate them to the participants before the meeting (design).

During
(20% of the time spent)
- Create atmosphere: Check-in exercise/small talk/questions to the participants.
- Pay attention to all participants – ask questions to all of them.
- Give regular summaries (metanarration) of what we have achieved, what we are doing now, and where we are headed.
- Maintain engagement with a check-in every 5 minutes (i.e. ensure no-one talks for more than 5 minutes at a time.)
- Maintain focus on the purpose of the meeting; manage the process.

After
(30% of the time spent)
- Did we achieve what we set out to?
- Send out minutes and summary of what was agreed.
- Ask for feedback from the participants on your role as facilitator.
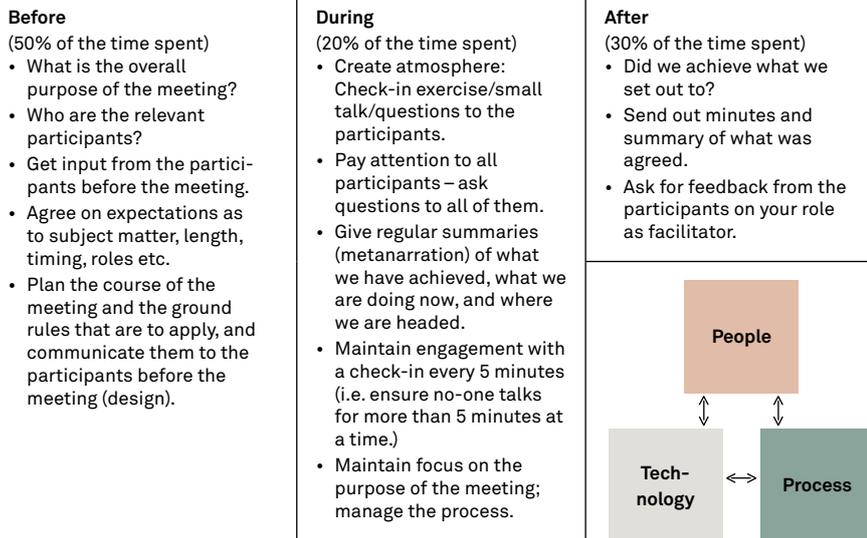

Figure 3. Suggested allocation of time, before-during-after, in virtual meetings

Open processes such as brainstorming, where the participants speak up without any structure, should therefore be kept to a minimum or avoided altogether.

Things to remember during the meeting

Our aim as facilitators is to facilitate dialogue and manage the process. It takes greater management skill to facilitate virtual meetings, as the same natural flow is not present in the discussion as would be the case for a meeting in a physical room. Controlling interaction in a virtual room can be a tough exercise, as you cannot see what the participants are doing as the meeting progresses. The table below lists a number of points to note in terms of providing the best conditions for the meeting and creating a good flow.

- Ask questions

- Connect the participants

- Use video

- Open the meeting formally

- Let the participants speak often

- Materials

- The purpose

- Parking lot

- Involve the participants

- Document the meeting

- Keep to time

- Exercises and tasks

- Polls, votes and chat

For more details on each element, see details in appendix.

Script and agenda for a virtual process

The design star, a clear purpose and a script, as described in our book "Facilitation: Create impact through involvement" (Djøf Forlag) and the article "Facilitation", are standard preparation for virtual meetings too.

At this site, you can do a mini self-assessment to see how good you are as a virtual facilitator. The questions are concerned with 1) creating a virtual script and agenda, 2) preparing for the virtual meeting and finally 3) chairing the virtual meeting. This is quite a good starting point for assessing where there is the greatest need to concentrate your specific development effort.

Final note

There are no short cuts to virtual facilitation. It demands great preparation, and we need to be just as skilled in the virtual world (in the use of IT functionality) as we are in the physical world with our body language, flipcharts, PowerPoints and exercise instructions. We need to be on top of the IT resources we have available if we are to focus 100% of our energy on the meeting itself.

Good luck in creating impact in our virtual meetings.

Case

A large professional network meets in a virtual form every other month. The participants come from the USA (several places), Canada, Sweden, Denmark, Germany, Japan and the Netherlands, and all share a common professional passion.

The meetings always start and end at the same time of day, which suits most time zones best. The participants have made conscious efforts to break down the four barriers to virtual meetings: Social barrier, Physical barrier, Technical barrier and Cultural barrier.

The meetings are run as follows:

The physical barrier is overcome by the fact that several of the participants have met before at conferences and have talked together there. Even though not all of them have met before, the fact that some of them have had a physical meeting before and know each other in a different way still produces a different atmosphere for everyone at the meeting. At the same time, every participant makes sure to sit down in a meeting room with the right physical conditions for a meeting.

The technical barrier is overcome by all the participants testing the equipment before the meeting. Each participant logs on to the Skype connection and signs in to the shared meeting about 5-15 minutes before the meeting officially starts. This allows them all to connect at their leisure, and energy is produced by watching more and more participants popping up on the screen. They all have video on, but make sure it is muted so there is no disturbance when people start to sign in. Allowing access to the meeting 5-15 minutes before it starts means that they are all completely ready when the meeting begins. Another technical barrier may be that the connection is bad, and here it is important to book a meeting room where there is peace and quiet and a reasonably stable network. Minutes of the meeting are always sent out, so if there is a bad connection and anyone misses part of the

meeting, they can be sure to find the most important items in the minutes.

The social barrier is overcome by everyone having video switched on, so the participants can see each other and have a laugh together. Being able to see each other rather than just hearing a voice creates quite a different sense of intimacy. Every meeting starts with an energy check for 5-10 minutes with everyone telling everyone else how they are. They might talk about the weather outside or talk about their morning (if they have just got up) or their day (if it is afternoon). This way, the participants establish a trust-filled space with an interest in each other as people. Always insert a 5-minute break in the middle of the meeting (which often lasts 1½ hours), when everyone goes to get something to drink (a cup of coffee or whatever). As one of the participants says: "It almost feels like we are drinking a cup of coffee together." This contributes a lot to the feeling of being close to each other even though the participants are sitting in different places around the globe.

The cultural barrier is overcome with various rituals at the meeting and on the agenda. The meeting format is evaluated all the time, and the participants offer suggestions/input to strengthen the technical focus of the meeting. During the meeting, there are regular checks on the decisions made. Can they be implemented everywhere? An example is where it is agreed to involve the "hinterland". Is this understood in the same way in Sweden, and does it mean the same in Japan? Involvement is important to all parties, but it is not always manifested in the same way. The cultural differences are often emphasised in the meeting as strengths, and the diversity is seen as an asset to the group.

If you are able to hold good virtual meetings, the culture will gradually change, and particularly when you find that you are saving a lot of time while also getting a lot of value out of the meetings, the culture of virtual meetings will start to change.

Figure 4. **Good ground rules for the virtual process**

- That everyone logs in at least 10 minutes before the meeting starts, so that it is certain that you can start at the agreed time and that there is room for an informal startup.

- That the time is sacred so that you are 100% at the meeting. Make sure you get an OK from all participants when you start the meeting (or an acceptance from everyone if it is necessary for some of the participants to step in/out at some point).

- That everyone clears their desk. When moving the meeting into a new physical context, where there is a high degree of distractions, it is important to create the right conditions before the meeting.

- All multitasking activities are omitted. Turn off the phone, close the emails down and put papers/magazines etc. away.

- That "everyone stays off mute". You can hear all foreign activities, and it is easier to get into discussions quickly.

- That everyone has time to speak. If someone is dominating, you can refer to the ground rules.

- Start out by saying your name. Every time you say something, please state who you are.

Figure 5. **Checklist to see how well prepared you are to lead a virtual meeting**

How comfortable are you facilitating a virtual meeting?

Creating a virtual agenda

- I know how to break down meeting objectives into 90-minute segments.
- I understand the level of interaction required for different kinds of virtual meetings, such as communication, data gathering, idea generation, team building, problem-solving and decision-making.
- I know how many people can effectively participate in different kinds of virtual meetings.
- I know how to construct questions to focus participant input.

Preparing a virtual meeting

- I know which technology tools best support different kinds of virtual meetings, such as communication, data gathering, idea generation, team building, problem-solving and decision-making.
- I know how to build a back-up plan should meeting technology fail.
- I know how to use synchronous data gathering and presentation materials to ready participants for a focused agenda.
- I know how to set ground rules for a virtual meeting in advance.

Running a virtual meeting

- I know how to keep track of participants and their level of interaction.
- I know how to test whether silence is a sign of engagement or disengagement.
- I know how to build trust during a real-time virtual meeting.
- I know to effectively use multiple communication channels to maintain connections between meetings.

Appendix

Good tips for creating the best meeting conditions[9]

Ask questions. Ask good questions and engage the participants often. If the participants are to provide quality input, they must be challenged with frequent searching questions to keep them up to the mark.

Connect the participants. People are more effective when they know each other and are comfortable together. If the participants do not know each other, allow time for a round of introductions or send out details of the participants beforehand. Make it a standard to introduce the meeting with a personal/professional check-in.

Use video. It helps people to relate and interact if they can see the faces of the other participants in the meeting or workshop. There are many options to choose from (Skype for Business (previously Lync), Skype, Webex etc.). Video also has a more binding effect, as it makes it possible to see each other's feelings and reactions, as would always be the case in a physical space. The participants are no longer just voices on the phone.

There are lots of different platforms for digital meetings. Whichever platform you use, you should always use a headset and a microphone to get the best possible sound quality. If your computer does not have a built-in webcam, you can connect an external camera.

Open the meeting formally

- Go into the meeting room around half an hour before the participants sign in.

- Write a welcome message on the front page, so that the participants are sure they have come to the right virtual meeting room.

- If the meeting has started, write this on the front page too, so that everyone is clear about this.

- Check that the participants can hear you and you can hear them.

- Switch on your webcam and ask the participants to do the same.

- Make it clear to the participants how you want to deal with questions and comments. Can they simply ask? Should they be entered on the chat page? Should the participants raise their hands? Should they wait until after your presentation? This is especially important if there are a lot of participants in the briefing/training session.

- Make sure the participants take turns, so they can all say hello to each other and make room for small talk, so that they are tuned in to each other.

Let the participants speak often. Ask the participants for brief and precise input. Share the time to speak among the participants. Make sure to give all the participants time on the agenda or throw in questions for discussion to obtain input from all participants and keep people engaged.

Materials. Switch between "writing" and "talking" – get the discussion started with a talk, and then all the participants can "chat face to face" with a shared flipchart, whiteboard or chat, where they can write down lots of ideas quickly. You can then go back to talking to reflect and check up on understanding, possibly finishing with polls to choose/prioritise.

If slides are to be shown at the meeting, make sure the material has been sent out to everyone beforehand and that they have access to view it on the screen.

The purpose. Maintain the focus on the purpose of the meeting by continually referring back to it. It is important for the facilitator to notice quickly if the participants start to wander from the objective. For example, this can be done by confirming with the group that they are moving away from the primary objective and suggesting that these aspects can be

addressed at a later date or by frequently reformulating and summarising key points and linking them back to the purpose of the meeting.

Parking lot. Have a parking lot that everyone can see with space for off-agenda topics to be addressed on a later occasion.

Involve the participants. Give the participants various tasks along the way to keep them engaged and prevent them from starting to do other work during the meeting. Nick Morgan recommends constant small touchpoints: "In a meeting, you need to stop regularly to take everyone's temperature. And I mean everyone. Go right around the list, asking each location or person for input." The concentration span in virtual meetings is short. Deal with this by engaging the participants roughly every 5 minutes and keeping presentations to a maximum of 10 minutes.

Document the meeting. Ensure that the discussions are documented either with the help of the person taking the minutes or by nominating different people to document things where this makes sense as you go along.

Keep to time. Keep to the time and help to prioritise the time if the agenda slips. Starting and finishing on time is an important part of these meetings, as we are logging in to a virtual room where we can expect other participants from other geographical areas to be waiting.

Exercises and tasks. You can do exercises and small discussion tasks along the way. Make sure that the task is clearly defined and maybe write it up on the screen so the participants can read the instructions. Consider whether some of the discussion exercises can take place at each site. For example, take 15 minutes at each physical location before everyone joins the video meeting again. This improves dynamics and breaks up the format where everyone is glued to a screen.

Polls, votes and chat. Polls are a fantastic interaction tool, which can be used for votes, to answer a question, to prioritise during the meeting and to create a fast and effective decision-making process.

Chat can be used in various ways – either for private chat among the participants, to allow the participants to ask questions without interrupting the facilitator or other speakers or as a tool to generate ideas quickly and effectively.

Notes

1. In this article, we use the term "virtual meetings" to cover all forms of mobile and in-house meetings held via IT, where the participants are physically separated but have a shared task to address.

2. www.danskebank.com

3. Read more in the book "Facilitation: Create impact through involvement" (Djøf Forlag) or implementconsultinggroup.com/facilitation/

4. The most widely used platforms, with which we have good experience, are: Skype, Adobe Connect, Skype for Business (previously Lync), Zoom, Webex and Google Hangouts.

5. Nandhakumar, J. & Baskerville, R. (2006). Durability of online teamworking: Patterns of trust. Information Technology & People, 19(4), 371-389.

6. Elvang, Z. & Nolsøe Skalts, N., Børsens Projektledelseshåndbog (Copenhagen Stock Exchange project management manual).

7. Experience from e.g. facilitators and Guided Insights, which are among the front-runners of virtual facilitation, shows that 60-90 minutes are the pain threshold for how long you can maintain momentum in a virtual meeting (Zakia Elvang og Nille Skalts).

8. Ferrazzi, K (2015). How to Run a Great Virtual Meeting. Harvard Business Review.

9. The figure above is inspired by the 2008 article on virtual facilitation from Zakia Elvang and Nille Skalts (see reference above).
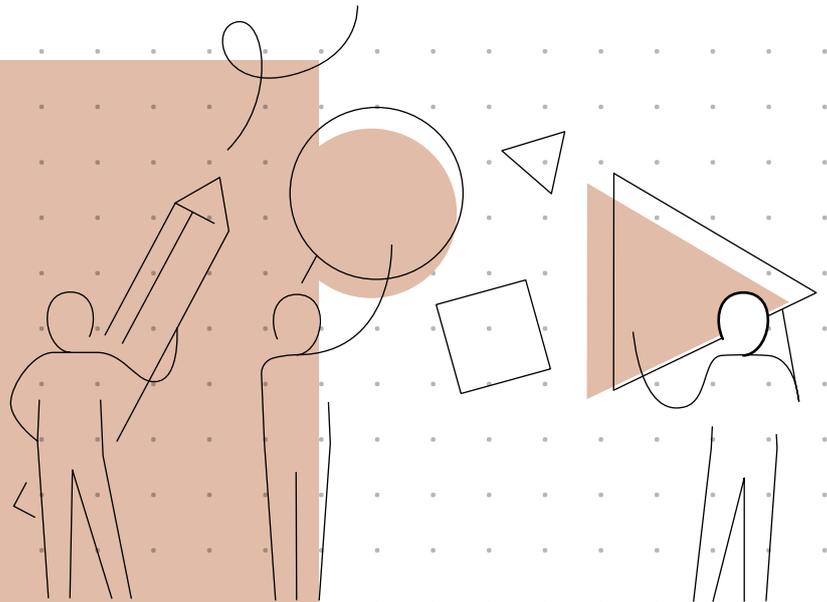
FAST FACTS
ABOUT IMPLEMENT

Founded: 1996
Number of employees: 900
Offices: Copenhagen, Aarhus, Stockholm, Malmo, Oslo, Zurich and Munich
implementconsultinggroup.com