EFFECTIVE VIRTUAL or HYBRID MEETINGS

Tips for maximizing effectiveness & inclusion of meetings which include remote (and sometimes in-person) participants

GATHER THE RIGHT CREW

Identify the team required to maximize the effectiveness of the meeting

Ensure 'Pilots' know how to fly the plane

→ Check that contributors (e.g. presenters) know how to use the tools on MS Teams (or other platform). Where they don't know, grab them a co-pilot who does

→ Get your cockpit right (screen layout): ensure presenters see chat, webcams, upcoming slides, etc. [>]

Identify a virtual 'Steward'

→ Steward welcomes everyone by name; start with virtual attendees

→ Steward briefs (& reminds) everyone on the procedures:
  • Mute as default
  • WebCams on
  • WebCam off to signal stepping away

→ Steward checks people have what they need

Identify the Crew
Chair, presenters, supporters

→ Make contributors clearly visible to the participants

→ Be ready to guide everyone on how to set webcams

→ Spotlight the meeting chair & speaker(s) [>]

→ If large meeting, give all "crew" distinct virtual background ("*I can help*")

ENABLE CONTRIBUTIONS

Ensure all participants can, and feel comfortable to, contribute to the meeting

Encourage participation

‹› Tell participants how to ask questions, e.g. "*ask questions through chat*"

‹› Direct participants on how to contribute so that everyone can see. e.g. "*share comments in chat*"

‹› Regularly invite virtual attendees (by name) to ask questions or add input

‹› Create a sense of a single 'meeting room'

Add interactive tools to build engagement

‹› Use annotation tools [>], live reactions [>] and other apps

‹› Add quick and easy surveys or quizzes

‹› Add apps:
  • virtual whiteboards (e.g. MS Whiteboard, Hoylu & Mural)
  • polling (e.g. Slido)
  • Q&A (e.g. Yammer)

Breakouts to aid sharing

‹› Use breakouts to enable small group discussions and to build trust

‹› Meeting pilot can move between breakouts to check progress

BE ON THE SAME ITINERARY

Ensure everyone knows why we are here, where we are going, and the progress being made

Share the plan

≡ Share the objective, agenda and pre-reading in advance of the meeting

≡ Confirm the physical (room) and virtual (link) locations in advance to all participants

≡ Use a "room" layout to "go round the table"

Monitor progress

≡ Regularly return to a visible agenda

≡ Capture notes live for all to see (can be as easy as a shared word document)

≡ Use annotation tools to guide everyone where to look, on slides & documents [>]

Confirm the destination

≡ Ensure notes taken of confirmed decisions and that next-step owners are visible to all

≡ At the end of the meeting, share the notes and next steps to allow participants to verify their understanding

EVERYONE GOES BUSINESS CLASS

Ensure all participants feel valued & included

All participants connect on their own device

✪ No hiding = encourage everyone to join from their own device with webcam on

✪ Help people manage webcam views [>]

✪ Ensure discussions can be followed:
  • Reduce background noise [>]
  • Either implement teams dial-in on a spider phone or in the room only one person connects to the room audio

Projection same for room and virtual

Where the presenter is in the physical room:

✪ Project from their separate laptop so everyone sees the same screen

✪ Point an additional camera at the presenter in the room

Where the presenter is virtual:

✪ Help ensure their webcam is large enough in the room for all to see equally

Respect the needs of others

✪ Stop in-room side conversations

✪ Consider accessibility needs. E.g. switch on live captions? [>]

✪ Consider recording the meeting for those absent

✪ Invite external partners [>] be aware that some MS Tools may not work for them