



**Managing Virtual Meetings  
for Real Results**

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by  
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Building State-of-the-Art Teamwork  
In Problem-Solving Organizations

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**A note on format**  Adobe Reader 6.0  
or later is required

- Underlined items are live links to articles on my Web site or elsewhere
- To get a copy with working links, go to: <http://bit.ly/ZYfnVT>
- To get a copy of the handout, go to: <http://bit.ly/ZYfqkt>
- To get both as a ZIP archive: <http://bit.ly/ZYfnVX>

Please let me know as we go along  
if you want to ask a question





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**Core Message**

- Virtual meetings present unique challenges
  - Elevated rates of confusion and miscommunication
  - More difficult to recognize miscommunication
  - More difficult to sort things out when the go awry
- For virtual meetings we must:
  - Do things differently from face-to-face meetings
  - Spend more money and time doing it
  - Cooperate more intensively

It's easier to stay out of trouble  
than to get out of trouble

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**The issue**

- We have a lot of experience with meetings
- We rely on it for estimating the time and effort required for any meeting task
- Most of it was acquired in face-to-face meetings
- Virtual meetings are much more complex
  - It takes longer to do the same things
  - It takes more effort to do the same things
  - They face many problems that F2F meetings don't
- Our F2F experience is misleading and creates numerous problems

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**Classifying virtual meetings**

- A meeting is *virtual* if its attendees are dispersed in space or time or organization
- Synchronous virtual meeting
  - All attendees are connected simultaneously
  - Some attendees remote, or some work for different companies
  - Teleconference, video conference, Web conference, ...
- Asynchronous virtual meeting
  - Not all attendees are connected simultaneously
  - No restriction on location
  - Wiki, email, text, snail mail, ...
- Co-located: in sight of each other, in the same room
- Serial: same people, meeting at regular intervals
- Incidental: meeting once only, or only a few times

We'll focus on serial, synchronous virtual meetings

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**Virtual meeting risks**

Risk Family	Description
Infrastructure	The substrate of software, protocols, and hardware underneath what people can actually experience directly
User Equipment	Software, computers, devices, projectors, phones, speakerphones, and other hardware that people interact with directly
Schedule	The process we use to determine when we'll meet and what deadlines precede or follow our meetings
Behavior	Everything we do as people.

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**Virtual meeting risks (continued)**

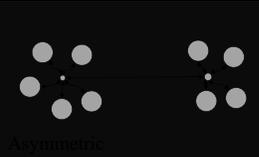
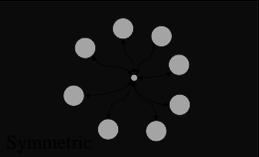
Risk Family	Description
Remote Facilitation	The process by which we actually run the meeting. If the meeting is asynchronous, this might be called <i>moderating</i> .
Process	The overall process supporting the meeting, including the sequences of events that precede it and succeed it.
Presentation	The components of the meeting related to an individual transferring information to the body of the other attendees.
Politics	What happens when we contend for control or dominance, or when we work to resolve specific issues.

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- Eleven tips for effective virtual meetings**
1. Know what performance issues are and how to handle them
  2. Test, test, test
  3. Use a favorable meeting geometry
  4. Know the art of agendas
  5. Deal with user equipment risk
  6. Deal with schedule risk
  7. Expect (and deal with) bad behavior
  8. Delegate
  9. Deal with inattentiveness
  10. Know how to deal with multiple languages (written)
  11. Know how to deal with multiple languages (spoken)
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- 1. Know what performance issues are and how to handle them**
- A performance issue is a pattern of behavior that's a contributing cause of disappointing individual or team results
- Performance issues must be dealt with by the employee's supervisor
  - If you aren't the supervisor:
    - Address the issue with the employee privately
    - Face-to-face if possible, otherwise by phone
    - If that doesn't resolve the issue, address it with the supervisor
    - If that doesn't resolve the issue, contact your supervisor
  - The offender's supervisor might be someone not of your organization
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- 2. Test, test, test**
- Test everything, not just technology infrastructure
    - What's tech support's response time at 0300?
    - How much lead-time is needed for purchases?
    - Do all firewalls permit required access?
  - Especially important for high novelty or low commitment contexts
  - Pay special attention to high-value nodes: Reviewers, Presenters, Facilitator, Chair
  - If a series of meetings is upcoming, test all sites extensively
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- 3. Use a favorable meeting geometry**
- Favor symmetric meetings
  - In asymmetric meetings
    - Proactively elicit contributions from tele-attendees
    - Consider supplying site facilitators
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- 4. Know the art of agendas**
- Shift routine chores to pre-meeting asynchronous media
  - Create a program, not just an agenda
  - Poll everyone for contributions in advance
  - Exploit order
  - Address emotionally charged items early
  - Phrase each agenda item as an imperative
  - Make agenda items specific
  - Allocate time to each agenda item
  - Have a timekeeper
  - Keep some time in reserve
  - Deal with overruns honestly
  - Have a not-agenda
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### 5. Deal with user equipment risk

- Avoid exploiting sophisticated technologies
- Avoid dependence on a particular product or release
- Expect localization issues for software
- Use trailing-edge technology when possible
- Anticipate problems with passwords
  - Forgetfulness
  - Disclosure
  - Names of special characters (#, <, [, ?, ...)
- Use virtual flip charts:
  - Agenda
  - Parking lot
- Last resorts:
  - Ship hardcopy
  - Send softcopy to a single individual at each site
  - When sending softcopy, it might be necessary to ship physical media

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### 6. Deal with schedule risk



- Send invitations early
- Treat habitual tardiness or absenteeism as a performance issue
- For serial meetings, set schedule expectations early:
  - Block out critical time windows
  - Identify key personnel
  - Make sure they will be available when needed
  - Make sure they have enough flexibility to accommodate others

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### Use Google alerts

[www.google.com/alerts](http://www.google.com/alerts)

- You want to know about trouble at participating sites as soon as possible
- Establish Google alerts for unusual events at all participating sites
- Each alert is of the form <site-name> <type-of-event>
- Event types:
  - Natural disasters: earthquake, tsunami, tornado hurricane, typhoon, blizzard, ...
  - Man-made disruptions: terrorism, war, power failure, industrial accidents, derailments, toxic spills, ...
- Site names: geographical, municipal, regional, street, highway, industrial, company name, ...

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### Adopt Team Standard Time

- Choose a single time zone for quoting all times
- Use an actual time zone if:
  - Everyone observes the same daylight time/standard time protocol, and:
  - There is a low level of split assignments
- Otherwise: use Zulu time (UTC)
- Quote times as TST in all communications
- Encourage use of mobile device clock apps for Team Standard Time
  - Provide team with a list of approved, tested clock apps
  - Some apps support UTC as a location option
  - If your app has no UTC, choose Reykjavik

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### Take time zone differences into account

- Middle-of-the-night meetings for someone might be inevitable
- Don't let the burden fall on the same people all the time
- Rotate on a regular, predictable basis
- Serve food at all sites—or none



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### 7. Expect (and deal with) bad behavior

- Be certain that everyone understands your behavioral norms
- Know what to do when a bully attends the meeting



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### Behavioral norms

- Publish norms the, and if necessary, train in advance
- Explain the importance of:
  - Not interrupting others
  - Identifying yourself when speaking
  - Refraining from sidebars—even when muted
  - Speaking clearly
  - Refraining from
    - Eating
    - Electronic activities unrelated to the meeting
    - Conversation with anyone not in attendance
  - Testing your connection in advance
  - Knowing how to use the User Equipment
  - Preparing
  - Cooperating with the facilitator
  - Arriving on time
  - Returning from breaks on time
- Explain that non-compliance is a performance issue

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### Have a contributor protocol for speaking

- Upon being recognized, contributors:
  - State their names
  - State their affiliations
  - Make their contributions
- Upon completing the contribution:
  - Use the “handoff” phrase
  - Examples:
    - “Back to you”
    - “Over”, “That’s it”, <facilitator’s name>
  - The handoff phrase reduces interruptions
  - Definition of an interruption: someone else speaking before the current speaker speaks the handoff phrase



This might feel awkward at first, but after using it for a while, you’ll wonder how you lived without it

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### Know how to deal with bullies

Workplace bullying is any aggressive behavior, associated with work, and primarily intended to cause physical or psychological harm to others.

- Examples:
  - Condescension towards target
  - Repetitive interruption of the target
  - Abusive humor at target’s expense
  - Isolating the target
- Be sure that your behavioral norms cover it
- Document what’s been happening
- In an emergency, seize the floor
- Treat the bullying as a performance issue

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### 8. Delegate

- Delegating roles solves three problems
  - Reduces inattentiveness
  - Makes meeting management more effective
  - Lets meeting chair focus more on content
- Roles you can delegate
  - Facilitator
  - Agenda manager
  - Action item recorder
  - Break manager
  - Parking lot valet
  - Timekeeper
  - Digression detector
  - Queue manager
  - Scribe



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### 9. Deal with inattentiveness

- Inattentiveness is a fact of virtual life
- For attention, during meetings, norms include:
  - No eating
  - No electronic activities unrelated to the meeting
  - No conversation with anyone not in attendance
  - No sidebars
- In return, we promise a 5-minute break every 20 minutes
- Delegate

As a virtual meeting planner, you don’t have a choice to skip breaks. You can only choose when they happen, and whether everyone breaks at the same time.

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### More tips for inattentiveness

- Video conferencing keeps people honest
- Keep presentations short
- In discussions, keep contributions short
- Avoid bullet-by-bullet slide builds
- For controversial issues:
  - Instead of open debate designate caucuses
  - Break up into caucus meetings
  - Have each caucus choose a Speaker
  - When you reconvene, speakers debate the issue in rounds with breaks
  - For each round, alternate positions

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## How to manage breaks



- Duties of break manager
  - Remind facilitator of time remaining until break (5 minutes, two minutes, ...)
  - Remind attendees of time remaining until we resume
  - Announce meeting resumption
  - Track late returnees
- Emphasize importance of break promptness

There are numerous countdown clock apps for PowerPoint and smartphones

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## 10. Know how to deal with multiple languages (written)

- Define a Document Language (possibly per topic)
- Have an official translation of all documents
- Use only the official translation during the meeting
  - All parties agree that the official translation is the basis of the meeting
  - If there are objections, delay the meeting or make them an early agenda item
- Verify mission-critical document translations
  - Loop back to verify semantic invariance for mission-critical translations
  - Use sampling to verify less-critical translations

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## 11. Know how to deal with multiple languages (spoken)

- Designate a Meeting Language
  - All speakers fluent in the meeting language use it
  - Provide interpreters for others
- Speak only languages for which there's an interpreter
  - At each node, or
  - Available through simultaneous translation
- Why single-thread is preferable:
  - Makes the meeting more efficient
  - Reduces confusion
  - Limits dissension and trust erosion resulting from exclusion

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## My newsletter: *Point Lookout*

- Weekly email newsletter
- 500 words per edition
- Free
- Topics:
  - Communications
  - Meetings
  - Project management
  - Change
  - Workplace politics
  - Conflict
- <http://www.ChacoCanyon.com/pointlookout>

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## Resources

- This and other related topics: <http://www.ChacoCanyon.com/>
- Tips book *101 Tips for Effective Meetings*  
<http://www.ChacoCanyon.com/products/101tipsmeetings.shtml>
- Tips book *303 Secrets of Workplace Politics*  
Acrobat: <http://goo.gl/7hG5g>  
iTunes iBook: <http://goo.gl/eWK75>
- More resources at  
<http://www.ChacoCanyon.com/resources/peopleatwork.shtml>
- Follow me on Twitter: [@RickBrenner](https://twitter.com/RickBrenner)
- Discussion group at LinkedIn:  
<http://www.linkedin.com/groupRegistration?gid=1878749>

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# Tell Me About This Presentation

May I *please* have and use a quote from you about this presentation? Thanks!

--

- OK to use my name
- OK to use my title
- OK to use my company name

What did you like best about the presentation?

What ideas will you use first?

Optional:

Name:

--

Position:

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CAPITAL  
LETTERS**)

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Did you  
use **BLOCK  
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My major source of business is through referrals. Do you know of a company, business organization, or association that could benefit from state-of-the-art teamwork and better relationships between people? Or could benefit from a presentation or seminar on topics like this one?

Thank you! (if you don't have all the info, fill in what you have and I'll get the rest somehow)

Referral Name:

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Position and  
company:

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