Pan American Health Organization

World Health Organization

Regional Office for the **Americas**

3. HOW TO CONDUCT EFFECTIVE VIRTUAL MEETINGS

Virtual meetings are a solution to virtually meet in situations in which participants cannot get together personally for different reasons.

Title	How to conduct Effective Virtual Meetings
Version	Draft Nº 1, May 17, 2015
Definition	Virtual meetings are a solution to virtually meet in situations in which participants cannot get together personally for different reasons.
Objective	To foster an encounter for the exchange of information, evaluation or decision making, regardless of the physical location of the participants using electronic tools and collaborative methodologies.
Expected results	• Optimization of human resources and time • Reduction of time and costs • Digital records of meetings for institutional memory • Problem solving • Decision making • Master conferences
Premises	• **Flexibility:** Remote communication requires flexibility and adaptation to technologies since geographic differences entail different access, time zones, languages and cultures. • **Promptness**: At present, it is almost essential to provide quick answers. (Travels, face-to-face meetings, airport schedules, lack of connectivity) • **Adaptability**: Organizations, including PAHO, are increasingly requiring their work to be developed by players in different locations and with different time zones.

Procedure

| Phase I | Preparation | This Phase involves the organization and preparation of the virtual meeting |

Relevant initial consideration: *This methodology refers to 100% virtual meetings and under no circumstances it should be applied to blended meetings since they require a totally different understanding and methodology.*

1. <u>Defining the type of meeting</u>: It is important to define the type of meeting, a) Problem solving b) Decision making, c) Master conference, d) Coordination or management of a decentralized or network project, or e) Information and knowledge sharing

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                    Problem
                    solving


    Information                          Decision
    sharing                              making
                   Virtual
                   meeting

        Master                     Project
        conference                 management
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2. <u>Selecting the knowledge management tool</u>: For effective performance, the virtual meeting requires the use of a tool that facilitates the exchange between members, easy to operate by all the participants, and requiring little prior learning. There are many tools designed for conducting virtual meetings and typically organizations are already using some of them. It is preferred to use what is already available and offers technical institutional support.

3. <u>Setting up the room</u>: As in any meeting, the room must be available and prepared in advance. In the case of virtual meetings, this step is called "set up". Afterwards, it is necessary to select the tool to be used:

   a. <u>Links to the room</u>: many electronic conference systems have links for the moderator and participants. It is advisable to know and try both of them before the meeting to ensure they are working properly.
   b. <u>Technical support</u>: Having a technical support available during the meeting start up is vital to reduce the stress in case of difficulties.
   c. <u>Preliminary tests and instructions</u>: Sometimes participants are not familiar with the system to be used during the meeting. In this case, it is always a good idea to invite them to connect 20 minutes in advance to take short basic tests of use, especially because in meetings, unlike presentations, everyone participates. Therefore, it is not desirable that participants feel constrained to participate because they are not familiar with the technology.
   d. <u>Documentation for the meeting</u>: It is advisable to have all the information (documents) that will be used in the meeting in a single folder. This is easier to share and upload to the room to be viewed, etc.

4. <u>Participants - Roles</u>: People attending a virtual meeting usually have roles well-defined by the meeting coordinator. This helps to prevent potential disorganization during the meeting.

   a. <u>Moderator</u>: It is usually the person who convenes the meeting. Some of his/her tasks involve:
       i. To assist those who are not familiar with the platform
       ii. Check that all the participants are available to start the meeting.
       iii. Say a few initial words and establish behavioral guidelines for the encounter
       iv. Make sure that the agenda is observed
       v. Organize participants' – planned and spontaneous – interventions:
   b. <u>Speaker</u>: In case the meeting includes presentations, the speaker – that may not be the moderator – is in charge of these interventions. Upon speaking, he/she must have his/her presentation available to share with the participants.
   c. <u>Participants</u>: All the people invited to a meeting are participants. They usually make comments, questions, and brief presentations of subjects they consider relevant. To do so, they should see to the organization of the event and respect the moderator. Bear in mind that comments may be made by using the microphone or the chat rooms.

5. <u>Agenda</u>: Even if brief, an agenda previously agreed and shared with participants is an element that, when organized and respected, prevents the unnecessary prolongation of the event. It is advisable to send the agenda in advance and avoid submitting it on the same day of the meeting. Preferably, it should include:

   a. Identification rules for participants: when the tools allow it, participants should include the following data when joining the meeting: Name, Last Name, Institution, Country or City. This information facilitates the correct identification of each participant as well as the virtual network connected to the event.
   b. Space for beginners: 20 minutes in advance for those who have never used the platform
   c. The meeting moderator will welcome participants
   d. Introduction of participants
   e. Development of the meeting
   f. Closure and next steps if required by the type of meeting

Phase II — Development

This Phase involves the development of the virtual meeting

1. **Right before the meeting:** It is advisable that the moderator attends the room 20 minutes before the scheduled time in order to:
   a. Test how the room works
   b. Load documents
   c. Welcome each attending participant
   d. Check with each participant that the audio is working properly
   e. Help those attendees that are not familiar with the tool

2. **Meeting opening:** The meeting starts when all the participants are in the room, the moderator welcomes participants and provides ground rules for the organization of the event and proceeds to observe the scheduled agenda. It may happen that not all the participants have joined the room; this should not be initially considered tardiness or a lack of respect. Although technologies have greatly improved lately, there are often many difficulties to access from different places, as well as connection troubles. Having an alternative means to communicate with those who have not arrived yet, ask them if they have any problem and offer them help is the right attitude both from the moderator and from the rest of the attendees.

3. **Development process:** For a virtual meeting to be effective, it is important:

a. To test the audio before the meeting;
b. To observe the time and roles set;
c. That the meeting lasts not more than 60 minutes: too long virtual meetings tend to be exhausting for participants and their attention decreases;
d. That the moderator has an active attitude and feels confident to intervene when the agenda is not observed;
e. That the moderator pays attention to the participants' behavior, in case they need to participate, make questions, or require technical assistance. To do so, he/she should always pay attention to what is happening in the room. This includes constant observation of the chat room and paying attention when someone asks "virtually" to speak.

4. **Closure of the meeting:** The closure of the virtual meeting requires the moderator to provide a synthesis of the topics addressed, identification of the next steps, if any, and responsibilities. This is best done when the meeting has clear goals. The synthesis should be done before the end of the meeting, seeking consensus of all the members. If the meeting was for decision-making or project management/coordination, it is important that the project leader submits a summary of short- or mid-term decisions and actions.

Phase III	Follow-up	According to the topic and style of the meeting, this phase allows to monitor the agreements made or make a summary of the conversations

1. **Minutes**: If the meeting was for decision-making or project management, it is important to prepare the minutes. The moderator, or the person assigned in the meeting, will be responsible of drafting and sending the minutes to the participants for review and, preferably, consensus. This will provide reinforcement to the closure of the meeting since minutes supply a synthesis of the conversations together with next steps and responsibilities. It is advisable to attach to the minutes, if possible, the access to the meeting recording and documents.

2. **Teaching material**: If the meeting was for the exchange of information or master conference, it is advisable to share the material during the meeting and before it ends since it is not always possible to have contact data of the people connected. If at all possible, establishing a digital repository is advised associated to its master conferences that can be sorted and retrieved in a standard manner and which is included in the institutional memory of the organization. The following metadata are suggested:

1. Name or title of the event
2. Thematic area (Preset table allowing standardization)
3. Responsible entity (Preset table allowing standardization)
4. Moderator
5. Host

Helpful hints

- **Natural resistance**: You should bear in mind that, although increasingly less observed, there will be significant resistance to the use of virtual conference systems. The main reasons are:

  o Virtual conferences (or meetings) are not part of the Organization Culture and employees still prefer face-to-face meetings;
  o The phenomenon known as "Technophobia" still exists;
  o Lack of awareness regarding the real power and added value this type of virtual meeting imply;
  o Concerns about technological safety.

- **Minimization of troubles**: In order to minimize **technical difficulties** that may arise during the session, it is crucial to keep the technical support available and include it in the meeting. If this is not possible, it is important to get previous assistance from the support staff to share the most frequent problems and their resolution.

- **Duration**: Meetings should be no more than 60 minutes long and audiovisual presentations should last 10 minutes maximum;

- **Adequate identification of participants**: When the tools allow it, participants should include the following data when joining the meeting: Name, Last Name, Institution. This information will facilitate the correct identification of each attendee. If several people are participating from the same connection, it is advisable to provide the name of the team and indicate the name of each participant in the introductory round.

- **Delay of participants**: It is advisable to have an alternative way of communication with participants, in case they do not attend the meeting at the scheduled time, as an additional option to contact them, ask them if they are having technical problems and assist them in the process of accessing the tool.

- **Interaction**: It is essential, regardless of the type of meeting, to have a final Q&A session where all can participate and give their opinion.

- **Organizational culture**: In order to get institutional ownership of this methodology (effective virtual meetings), it is very important that the topic is not addressed as the "solution to all the problems in the institution" or as the tool that has been compulsorily implemented to replace mission travels or face-to-face activities.

- **Communicating the benefits**: An internal communication and training strategy should be developed, jointly with the Human Resources Department, that will allow to reduce staff knowledge gaps – and fears – and which enables to understand the following advantages:

  o Effective virtual meetings help in the reduction of costs that could be used in other projects of your interest;
  o Effective virtual meetings help in the optimization of time, especially as regards master participations in events of medium or modest dimension;
  o Effective virtual meetings allow to incorporate in projects people to who could not otherwise be incorporated for financial constraints or priorities of both parts;
  o Effective virtual meetings allow to exponentially increase information dissemination or master conferences;
  o Effective virtual meetings allow to better focus on the objectives by enhanced incorporation of network concepts through the use of decentralized teams;
  o And many other advantages you will discover together with your staff.