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Top 10 Learnings for Leading Virtual Group Meetings

by Janine Davis and Erik Kellener

We were all set to deliver leadership training for a client when COVID-19 hit. We had a limited amount of time to completely redesign the training for virtual delivery. We had to compact it, slice it up into smaller sections, and infuse it with interactivity and connection using technology. It took many hours of research, design and iteration.

We wrote this guide of condensed learnings from our experience, to help leaders successfully run larger-scale virtual meetings. If you are leading an All Hands, team meetings, trainings, workshops, or multi-organizational events, this guide is for you.

What follows are the Top 10 lessons we learned.

1

Get Clear on Your Intentions

"Begin with the end in mind" – Stephen Covey

Getting clear on what you want out of the meeting is a great way to align your thinking and to start the planning process. Defining the desired outcome allows you to back into identifying what actions are needed to achieve your objective(s). From here, you can take one step further back, and uncover the motivation driving towards the outcome. After going through this thought process, you'll have the mindset and motivation to execute the actions needed, which in turn will create the results you're wanting to achieve.

A simple example could look like:

- **Results:** Attendees have learned some new strategies for engaging in the company's mentorship program.

- **Actions:** Invite participants who can share their success stories, and build a summary/cheat sheet to distribute after the session.

- **Motivation:** I never really had a mentor, and felt I missed out on the growth opportunities, and want to make sure it's now front and center for the company.

2

Get a Co-Pilot

If you are facilitating a meeting, it's essential that you are grounded and present. This is difficult if you are simultaneously trying to set up 25 breakout rooms and monitor the chat. Get a co-facilitator so you can focus on leading the meeting, not running the operations. We opted to swap the facilitator/operations roles back and forth. While one of us facilitated part of the meeting, the other ran the ops, and vice versa. We created a very detailed run of show, so on a slide by slide basis, the person running ops knew exactly what they had to do and exactly when they had to do it. We then practiced it twice as many times as was probably necessary. (Aside: we are both former CTOs and if you learn nothing else from running tech, you learn to double the budget and double the time.) This practice falls into the short-term pain/long-term gain category. It takes more time to prep, but we found it to be well worth it. The result is a seamless and stress-free experience for the participants, which is what we were committed to providing.

3 Prioritize Effectiveness over Efficiency

Efficiency in communication is highly valued in many organizations. When hosting a meeting, many leaders think "I have a lot to cover with this group. How much content can I fit in this fixed window of time?" In meetings, while efficiency is important, effectiveness is equally if not more important.

To help gauge effectiveness, ask yourself this question: "Will the audience clearly understand what was communicated in a way they can take action or walk away with new insight?" Hosting any virtual meeting and maintaining participant engagement can be challenging, as there are many additional distractions at play. Compounding this by forcing too much content into a session can reduce engagement and lower the overall effectiveness of the session.

Consider instead, reducing the breadth of content and focus on giving more space for discussion/interaction or diving deeper into topics. We strongly recommend doing shorter, more frequent sessions (about 2 hours per session), but if you need to do a longer day we recommend building in frequent short breaks as well as an hour break for lunch.

4 Allow for Variety

Allowing your participants to experience a variety of things in a meeting will increase engagement substantially.

When delivering/teaching content, ensure some type of audience interaction (e.g. polling, reactions, discussion, chat-out, breakout rooms, group or individual exercises) occurs every 5-8 minutes. We opted to pepper in points of reflection, group interactivity and discussion, dyads or triads for more intimate conversation or peer coaching, as well as a dose of fun! For collaboration sessions, consider using a shared whiteboard, or shared document tool to keep audience engagement high (we use Mural).

As you design the program, feel into your objective in each part's delivery. Are you hoping to encourage depth and connection? Do you want the participants to practice using a new method, approach or idea? Do you want them to just look inside to see what comes up around a topic? Don't fall into the trap of finding some cool new technology and designing the program around it. It should be a delivery mechanism, not a driver for the design.

5

Level Setting

When gathering a group together for the first time in the virtual context, consider spending some effort to remove any obstacles that could get in their way of being present and engaged.

Technology Tools

- Send out notes and links to documents ahead of time that may be needed for the meeting

- Send out instructions on how to install and setup any required software tools and ensure they have access to them when the meeting starts

- For tools that are new to the group, do a screen share demo at the beginning, or send a tutorial ahead of time for relevant features

- Ensure you have a fallback plan - "WHEN the tech fails"

Meeting Agreements

- How to ask questions during the session?

- How to communicate if a participant needs to drop off early

- Be explicit on confidentiality of the meeting - is it being recorded?

- When is Video On / Off?

- When should Audio be On / Off?

- **Bonus:** To increase engagement, encourage the group to add to the list

6 Include Everyone

In any meeting there are some who feel more empowered to speak up, and those who tend to stay quiet. This is exacerbated in a virtual world. Those that tend to stay quiet will stay quieter, and feel less comfortable than usual sharing their perspective or asking questions. And there's bound to be a few voices that are more comfortable entering the space.

If your goal is high connection, engagement and participation, be deliberate in creating a space which allows all team members to participate meaningfully.

- Leverage your outgoing team members to kick off a group discussion and get the energy going

- Ask for feedback or input specifically from someone you haven't heard from yet

- Utilize breakout rooms for smaller group discussion before discussing as a large group

Breakout groups are a great way to boost inclusion, but we strongly recommend you be strategic about who you place in a breakout group together. Are there any power differentials that might make it hard for some to participate authentically? Is there a diverse representation of perspectives and personalities? Put time limits on each person's share, and gently monitor and remind people so no single person takes up all the airtime.

7 Embrace the Silence and the Space

Silence can be awkward at the best of times. It's more awkward in virtual calls. Half the time you assume someone is on mute. It's especially tough to figure out the meaning of silence when you have a big group in the session. Body language is easily lost in a sea of small faces on a screen.

We suggest that you embrace the silence. Allowing ample space and time and quiet, especially during transitions or debriefs, is what births magic. Throw a question out and then be quiet – even if the silence lasts a minute and is uncomfortable. In almost all cases someone will open up once they are ready, and the flow and depth of the ensuing conversation will be well worth the seconds of discomfort. Practice the mantra "Slow down to speed up."

8

Check-In

One of the most effective ways to gather your group's attention at the beginning of a meeting is to lead them through a check-in. This is an exercise where the host poses a question to the group (e.g. "What's it like to be you today?") The host can model by answering it for themselves, then pass it on to the next person in the group to answer. That person answers, then passes it on, until everyone has had a chance to respond.

As a host, check-ins are effective at gauging the pulse of the attendees, and it is a great way to get everyone's voice in the room. It is also valuable for each member of the group by giving them a chance to self-reflect and share something that the rest of the group may not know. Depending on the prompt, this may require some vulnerability, and as a result can set the tone for participants to stay engaged throughout the meeting.

Check-ins can come in many forms. As an example, one type of check-ins that can be both efficient and effective is a "sentence stem". This is a fill-in-the-blank type of statement.

e.g. :   "The thing that's got most of my attention right now is … "

"The word that describes my mood today is … "

"Right now, I feel … "

Sentence stems can add more structure, resulting in a shorter response without sacrificing the benefits of the overall check-in exercise.

Check-ins can be introduced with any size group. For larger groups where time is scarce, consider using sentence stems. If the large group is hosted with a virtual conference tool that supports breakouts rooms, use them to scale your check-ins to any size group. Additionally, check-in prompts can be highly tailored to a group context - "With our new launch this weekend, what are you most proud of?", or the prompt can be broad reaching - "The thing I'm hoping to get out of today is _____". Regardless of how you use check-ins they are a great way to start off your meeting for success.

9

Invite Co-Creation

Our new world is just that. New. It's been said many times that there is no playbook for our current state. We are all experimenting with new ways of doing business and doing life, whether we want to or not. We encourage you to bring that experimentation into the world of large meetings. Tell the participants that you are going to be trying new approaches and it's all in a quest to figure out what works best as we move forward into a new reality. Enlist them in your co-creation vision. Crave and applaud feedback. Create a new set of best practices with the entire team, and you'll find they're more engaged in the process.

10

Welcome Everything

Regardless of how well you plan, communicate and prepare for your meeting, Murphy's law will be lurking behind the corner. Instead of resisting, trying to mitigate all the potential problems, and assuming everything will go as planned, consider instead accepting and embracing the unexpected. As a meeting host, how you respond to the glitches is more important than resolving the issue itself.

Miles Davis is famously quoted saying, "it's not the note you play that's the wrong note - it's the note you play afterwards that makes it right or wrong."

Plan reasonably, be open and welcome everything.

Group Meeting Preparation Checklist

❏   Have you defined your intentions?

❏   If more than 10 people are attending, did you line up a Co-Pilot?

❏   Is the amount of content digestible?

❏   Are you using the right tool or approach for each part of the program?

❏   Did you prep your participants and level-set them on technology?

❏   What steps will you take to ensure everyone has an equal voice?

❏   How will you do a check in?

❏   How will you allow your participants to co-create with you?

❏   Are you prepared to allow silence to happen?

❏   How can you model the concept of "welcome everything"?

Call in Support

When stakes are high, engage a professional. Many of our clients have reached out as COVID-19 has impacted where and how we work, to raise the bar on virtual meetings, from team meetings to leadership offsites. We are currently offering:

- Professional Facilitation by Evolution Partners
  … to steer key meetings toward clarity - bringing everyone's voice into the conversation and creating focus on our desired outcome.

- Virtual Meeting Facilitation Training
 … to train your managers in virtual meeting facilitation

To explore how we can support you: evolution.team/contact

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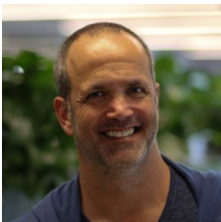
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