



# Remote Meeting Best Practices



## Introduction

What we've learned over recent times is a lot about remote meetings and how to make them effective. And all meetings are not created equal. Each type of meeting requires a different approach. For example, a team meeting requires one approach and a 1:1 quite a different one. This presentation explores the options to be considered in optimising the effectiveness of a remote meeting.

None of the suggestions in this deck will come as a surprise. In fact, you'll ask 'what's new?'

The one thing we know for sure, is that historically in-person meetings are themselves beset with challenges. Bad habits that existed for in-person meetings will be exacerbated in the remote environment. Fundamentally, a remote meeting will suffer from attendee distraction much more than it would if you are using the skills of body language and eye contact in a single physical space. **This means that the overall premise of preparation and structure need to be respected much more.**

Finally, these suggested best practices must be considered in the context of each organisation's individual requirements and cultures.

Let's work through those best practice ideas.....

## Planning a Remote Meeting

### Agenda

The agenda should be clear. Beyond the meeting title, the organizer should articulate what the objective of the meeting is. That could be a single decision on an issue or a broader mission statement. Detailed agendas and meeting materials should be available at least a day prior to the meeting, if not when the meeting is booked.

### Attendees

Who you need at the meeting depends on what you need to achieve. If a decision is needed in short order, then you need those that are the final arbiters, the decision-makers. If making quick decisions is less of a priority, then you will likely find attendees with greater availability at more junior levels. Equally, think about the practical elements here, such as time zones and scheduling. If you need global input, then consider having more than one meeting. You should not expect anyone to attend a meeting outside of traditional business hours. If you are hoping that certain attendees will play a key role, speak to people before the meeting to manage outcomes and to ensure attendance.

## Lights, action, camera

We all may like to think that being open and visible is always the best option but be careful about mandating that cameras always be on. Working virtually exposes us to more interruptions (think dogs and kids.....) so depending on your work setup at home, these things become more challenging. The Harvard Business Review also documented how remote meeting fatigue can generate greater anxiety around the feeling of being exposed visually on camera so you need to consider the wider impacts on your colleagues. Here are some tips to consider:

### Camera ON

- ❖ IF you are leading/chairing the meeting or presenting
- ❖ IF it's important to demonstrate that you're paying attention & engaged (especially for one to one's or smaller meetings where your attendance is key)
- ❖ IF you are meeting people for the first time who you will likely work with again (building rapport or developing culture with your team)
- ❖ Managers should encourage camera usage where appropriate to maximise employee engagement (inclusivity). Staff can be excluded if no visual interaction/triggers can be used to assess reactions.
- ❖ IF you are conscious of your appearance or struggle with large virtual meetings, using speaker view and hiding self-view can be a useful tool rather than defaulting to no camera (i.e. if you don't want to be on camera all the time).
- ❖ IF the room you're in is presentable, calm, and relatively distraction-free

### Camera OFF

- ❖ IF you don't expect to speak much or a not a key contributor to a meeting, albeit if you do speak, consider turning on your camera
- ❖ IF the meeting doesn't require making an impression or are large meetings with no expectation of involvement (information sharing).
- ❖ IF you're meeting with people you've developed a rapport with
- ❖ IF you simply need a break from the camera (it's ok to choose when not to turn on your camera if you are fatigued!).
- ❖ IF there's a lot going on in the room you're in or if you are not in an office environment.

## Let's kick things off!

### Tools & Materials

Zoom or Teams or.....? It is not important which you use but bear in mind, if your meeting has external attendees, then your chosen remote application may not work for some. Ask the question!  
Less is more..... There is no doubt that pictures often speak louder than words but the structure of your agenda and the associated materials should get to the punchline sooner rather than later.

### Organizer

Keep an eye on your email as last-minute issues regarding attendance or connectivity may come in. Manage expectations before launching into your agenda. Clarify what you expect each attendee to do/ contribute and how they should conduct themselves once online (i.e. should they wait until someone else finishes speaking before voicing their opinion or use the application functionality and mics muted while others are speaking, etc.)  
You can also mention these guidelines in the introductory email you send along with the agenda.

## During the meeting

### Introductions

- ❖ **Make sure that the connection, both audio and visual are working correctly**
- ❖ **Allocate Some Time to Break the Ice.** For remote teams, a meeting can also be a time for relationship building. Instead of diving right into discussing official matters, take some time at the beginning of the meeting to break the ice. This will also help keep the participants engaged in the hours ahead. You can go around the virtual meeting room asking everyone how their week has been, or by talking about a current event that everyone's affected by.
- ❖ **Clearly introduce all participants or have each person introduce themselves.** This may not be relevant in a long standing or regular meeting
- ❖ **Remind participants of the goal(s) of the meeting**
- ❖ **Remind participants of the tools that will be used during the meeting and how they should be used.** This may be ways in which questions should be asked i.e via chat functions or simply verbally

## During the meeting

### All Attendees

- ❖ Dress appropriately
- ❖ Make sure you are set up with a background that is professional and work-appropriate (i.e. no beds, messy rooms, etc.)
- ❖ Mute your microphone when you are not speaking
- ❖ Don't get distracted. Don't stare at your phone, type away on your keyboard or work on other tasks when someone else is presenting
- ❖ Put your phone on silence and turn off other notifications
- ❖ Wait for your turn. Don't interrupt while others are speaking or talk over them
- ❖ If you have a comment or a question, bring attention to yourself before speaking. Either make a hand gesture or say 'question' or 'comment' or use the pre-agreed application functionality
- ❖ Be ready. Make sure your connection, camera and microphone are working prior to the meeting
- ❖ *Tip: Assign attendees the roles of facilitator, notetaker, timekeeper, etc. Rotate these roles among them on different days to keep them all engaged*

## After the meeting

### Stay organized

It's important to keep a record of all ideas shared during the meeting. It can be shared with those who missed the meeting and be used to create your action plan later.

As important as discussing things and finding solutions is assigning everyone who participated in the meeting deliverables and action items to implement the plan. At the same time, it's important to clarify the due dates and when the next meeting will take place.

If you are using a task management tool, you can quickly plan everything on it. You can also use an action plan template (check out the one below) to get things prioritized.

*Tip: Send an email with a recap of everything including the action items assigned to them after the meeting.*