

# Tamworth Business Chamber's guide to remote meetings with your staff and customers



## At a glance:

- **Choosing the right tools for the job** – link to <https://au.pcmag.com/cloud-services-1/10187/the-best-video-conferencing-software-for-2020>

How to identify which tools you need to succeed—and why audio and video are non-negotiable.

- **Laying the foundation for successful virtual meetings with a virtual coffee break**

How encouraging casual team conversations between meetings can make your actual meetings more productive.

- **Setting an agenda and meeting guidelines**

Failure to plan is planning to fail.

- **Etiquette for online meetings**

Mute that phone (and other must-do's for successful remote meetings).

- **Keeping the team engaged**

How to engage meeting attendees, whether they're online or in person, introverts or extroverts.

- **Online meeting follow-ups**

Make sure everyone knows which ball is in whose court.

## Laying the foundation for successful virtual meetings

When you work with an in-person team or deal with customers face-to-face, there are naturally more opportunities throughout the day to stop, chat, and connect. Those informal conversations and connections help build a rapport that carries over into meetings, making people feel more engaged and perhaps more comfortable voicing their opinions or offering critical feedback.

Unfortunately, remote team members don't necessarily have those opportunities, which is why leaders and managers have to be proactive and create them. If most team members haven't spoken or seen each other in a while (thanks to COVID-19), they'll likely be reluctant to share or debate ideas in front of others. So before making virtual meetings a regular part of your team's workflow, it's important to get everyone comfortable with communicating with each other.

A great way to do that? Build a "virtual coffee break"—a communal place online where team members can get to know each other and connect outside of structured meetings. This could be as simple as a closed Facebook Group or something more sophisticated like Microsoft Teams or Facebook Workplace.

Regardless, giving remote teams a shared space to connect online helps them:

- Get comfortable (and, let's face it, feel less awkward) communicating across digital channels with people they haven't met in person
- Get to know other members of the team and their expertise
- Identify any potential issues when it comes to communication styles or differing points of view ahead of meetings

## Set an agenda and agree on remote meeting guidelines

If you want your scheduled remote meeting to be efficient and successful, you need to plan your agenda.

For every virtual meeting, it's important to create a clear meeting agenda that includes:

- Key talking points
- Meeting structure (for example, when and for how long you plan to discuss each talking point)
- Team members/teams that will be in attendance
- What each team member/team is responsible for bringing to the meeting
- Any relevant documents, files, or research

Just as important as the meeting agenda are the meeting guidelines: the rules and expectations of how the team is expected to contribute to the virtual meeting.

You want to make sure that everyone enters [into the meeting] with clear guidelines of expectations and knowing what [everyone is] going to be doing and how to manage the virtual space.

So, for example, can everyone speak freely or will the team leader call on someone when it's that person's turn to contribute? Does everyone need to have their camera on at all times or just the presenter? Should people mute their phones while others are speaking?

Setting a clear meeting agenda and guidelines (and sending them to the team at least 24 hours in advance) will help ensure that everyone is on the same page before the virtual meeting takes place.

## Etiquette for online meetings

While different meetings will have different "rules," there are some basic etiquette practices everyone should follow to create a smooth online meeting experience. Think of them as the must-do's of online meeting etiquette:

- Introduce everyone during the meeting, and give everyone a chance to contribute
- Don't stare at your phone while other people are presenting

- Don't interrupt other people when they're speaking (or attempt to speak over them)
- Test all technology (including camera/video, Wi-Fi, and screen sharing) before the meeting
- Read the agenda, and come prepared
- Don't work on other tasks (like checking email) during the virtual meeting
- Turn off all notifications and make sure your mobile phone is on silent
- Make sure all team members are in a quiet area free from unnecessary distractions. When in doubt, just practice common courtesy. People want to be heard, seen, and respected during an online meeting—just like they do everywhere else.

## Keeping remote team members engaged during online meetings

Here are our top tips for keeping the entire team present for a remote meeting, from beginning to end:

### Make time for casual conversation

These are extraordinary times. People are possibly lonely, stressed and scared so make time for friendly interaction before diving into a meeting can really build the necessary rapport for a successful sit-down—and keep the team engaged when the conversation jumps to business talk.

In virtual settings you don't have that face-to-face [interaction], so you have to work double hard to generate that trust and that rapport.

Spend a few minutes at the beginning of the meeting checking in with everyone, catching up, or just having small talk about what's going on at home, in adapting to this new normal. Not only will it boost engagement, but it can also strengthen culture and deepen your relationship with your team.

### Have everyone introduce themselves

If there are a lot of people attending a meeting, or external parties, it can be hard to keep tabs on who's who. Having everyone introduce themselves at the start (and especially before someone speaks or presents) is a good way to help everyone keep track of different team members and how they're contributing to the meeting.

### Give everyone a job

Have you ever been to a meeting and had zero idea why, exactly, you were there?

Not having a clear purpose for each attendee is the quickest way to kill team engagement. Before the meeting, make sure everyone on the team has a job; for example, have one team member write down any questions that come up during a brainstorm, have another take notes on key discussion points, and have another

manage the slide progression during the presentation.

The best jobs to keep remote workers engaged during meetings are:

- **Interactive.** The job should require each person to contribute in real time and interact with the meeting and other team members.
- **Straightforward.** If the job is too complex, your team may spend more time trying to figure out what to do than actually participating in the meeting.
- **Frequent.** Ideally, each team member's job is something they need to do over the duration of the meeting so that they're engaged from start to finish, rather than being assigned a "one and done" task.

Giving everyone a job allows them to take an active role in the meeting and makes them feel like part of the action, instead of forcing people to be passive listeners—which, we can all attest, is boring and tedious.

### Include introverts during remote meetings

It's important to keep everyone engaged during remote meetings, including the team members who might not be the most vocal or outspoken.

As a facilitator, your job is to not only bring everyone up and empower them but also to create a space of safety for those individuals who maybe aren't as comfortable vocalizing themselves.

If there are people in the meeting who are less comfortable speaking up, structure the meeting in a way that gives everyone equal opportunity for their voices to be heard, like a round-robin-style discussion, where everyone gets five minutes to share an insight or experience they've had around the meeting topic.

If you notice that someone on the team is trying to contribute but getting overshadowed by more extroverted team members, carve out time for them to speak (and make sure the rest of the team is listening).

Some team members may still be reticent to pipe up during a virtual meeting. Take the time to schedule a one-on-one to get that person's insights on how you can make remote meetings a more inclusive space for them.

### Online meeting follow-ups

In order for a meeting to be effective, every person needs to walk out with a clear objective. The key things everyone needs to know are:

- Deliverables and next steps
- Who's responsible for following up on each item or task
- When those deliverables are due
- When the next meeting or check-in will be

And if you were the host, don't forget that an important part of meeting follow-up is checking in with attendees about how well the meeting went, whether you choose to do so through a casual one-on-one conversation or by sending out a simple and anonymous feedback survey. Hearing from attendees may just give you ample ideas on how you can make future meetings even more inclusive and efficient for everyone involved.

*We hope you find this helpful. The team at the Tamworth Business Chamber.*