

BOOST YOUR IMAGE: MASTER THE THREE STAGES OF VIDEO CONFERENCING SUCCESS

A 1080 Group Paper and Checklist
Prepared for Citrix Online

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WHAT YOU WILL LEARN

Consider an analogy about how our relationship with the telephone has evolved. There was a time we had to “go to the phone,” whereas now the “phone goes with us.” Many people find it hard to imagine how they would manage without mobility. In time, many also find other features in their mobile phones such as web browsing or email an indispensable part of productivity.

Users of video conferencing are experiencing similar “aha!” discoveries.

Video conferencing no longer has to mean “go to a room with expensive, hard-to-use equipment installed.” High definition video is available from our laptops, and users are discovering value beyond “saving travel costs.” This new paradigm, however, creates a new set of questions:

- What are successful practices when using video conferencing?
- What do video conferencing users like and dislike that I can learn from?
- How might I accelerate how quickly my organization realizes value from video conferencing?

To answer these questions, 1080 Group, LLC conducted quantitative and qualitative research in May-June 2011, surveying 1188 professionals. The investigation focused primarily on the behavioral aspects of using video conferencing. From this was derived a set of best practices to help users accelerate success and avoid common mistakes.

This paper will help new and experienced users of video conferencing take the next step toward more successful video conferences by delivering:

- Highlights of findings from the research conducted
- Tips organized to assist users ensure competence, develop confidence, and lead collaboratively
- A reference checklist for leaders preparing to conduct a meeting using video conferencing

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VIDEO CONFERENCING USERS EXPECT TO GROW USAGE 211% IN THE NEXT YEAR

Video Conferencing is Reaching the Critical Mass

Of the 1188 survey respondents, 83% (985) have attended or led video conference. In the next year those experienced respondents (Attendees and Leaders) expect to grow their own use of video conferencing by 211%, from an average of 3 times to 6.3 times monthly. Notably, even those Leaders who categorize themselves as already “actively using” video conferencing expect to increase their own usage 63%.

What factors influence your decision to use video conferencing?

1. Allows us to show something that is not easily shown from a computer screen
2. Saves cost of travel
3. Helps us become a “greener” organization
4. Helps us reach more people
5. Saves the inconvenience of travel
6. Saves time away from other duties
7. Helps us communicate more frequently
8. Adds a personal touch to a web conference

1080 Group, LLC research
April-May 2011, N = 1188

RESPONDENT EXPERIENCE BY LOCATION

	EUROPE, MIDDLE EAST, AFRICA	NORTH AMERICA	ASIA PACIFIC
NEVER USED VIDEO CONFERENCING	15%	15%	23%
PARTICIPATED, NEVER INITIATED A VIDEO CONFERENCE	44%	46%	38%
INITIATED A VIDEO CONFERENCE	41%	39%	39%
TOTAL RESPONDENTS	480	367	341

Figure 1 - More than eight out of ten respondents have participated in a video conference

Interestingly, when all respondents were asked what influences (or would influence) their decision to use video conferencing business productivity was rated more highly than saving money (see sidebar). While not true for every choice in the survey, statistically significant differences emerged based on respondents’ geographic location (Figure 2 below).

SOME VALUES DIFFER BY LOCATION

	EUROPE, MIDDLE EAST, AFRICA	NORTH AMERICA	ASIA PACIFIC
HELPS US COMMUNICATE MORE FREQUENTLY	113	84	98
SAVES TIME AWAY FROM OTHER DUTIES	108	87	102
SAVES THE INCONVENIENCE OF TRAVEL	106	89	103
SAVES THE COST OF TRAVEL	100	94	106

Figure 2 – The value of video conferencing differs by location (relative to the index average of 100)

79%

Believe video conferencing helps them stay connected

64%

Believe video conferencing helps their organization achieve productivity objectives

1080 Group, LLC research
April-May 2011, N = 1188

Takeaway

Two significant observations emerge from the 985 Attendees and Leaders who've used video conferencing:

- All expect to increase usage, suggesting they are experiencing benefit currently and believe there is additional value to gain
- There is disagreement about which benefit is most important, observed both between Attendees and Leaders and among geographies. This suggests they are discovering how video conferencing is valuable uniquely for them

Respondents Differ in How Successfully Leaders Perform

The survey was constructed to separately query Leaders and Attendees on how well Leaders are using video conferencing. In some areas, such as "does not make eye contact with the camera," Leaders rated themselves the weakest while Attendees noted this as significant distraction, indicating a clear acknowledgement of a need for improvement in this area.

Other areas, however, provide additional insight for Leaders. For example, the top complaint of Attendees (mean of 3.8, Figure 3) is "distracting mannerisms or gestures." This receives a lower score from Leaders (mean of 3.38, Figure 4), indicating that Leaders recognize the importance of this issue and how well they feel they are performing.

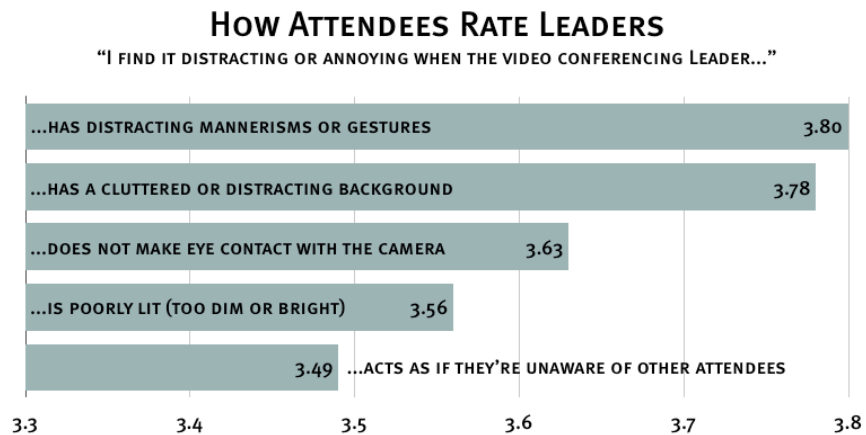


Figure 3 – Attendees generally agree - each option is potentially distracting or annoying

Similarly, Leaders give less attention to what is behind them (mean of 3.27), while Attendees ranked "cluttered or distracting background" (mean of 3.78 – Figure 3) nearly as annoying as "distracting mannerisms or gestures" (3.8).

To grow the value of video conferencing in their organizations, Leaders should:

1. Be the example. Demonstrate how video conferencing can be used for short or on-the-fly collaborative sessions
2. Help others overcome resistance to change by guiding them to a successful experience
3. Demonstrate best practices in virtual presentation and facilitation skills

HOW LEADERS RATE THEMSELVES

“WHEN USING VIDEO CONFERENCING, I...”

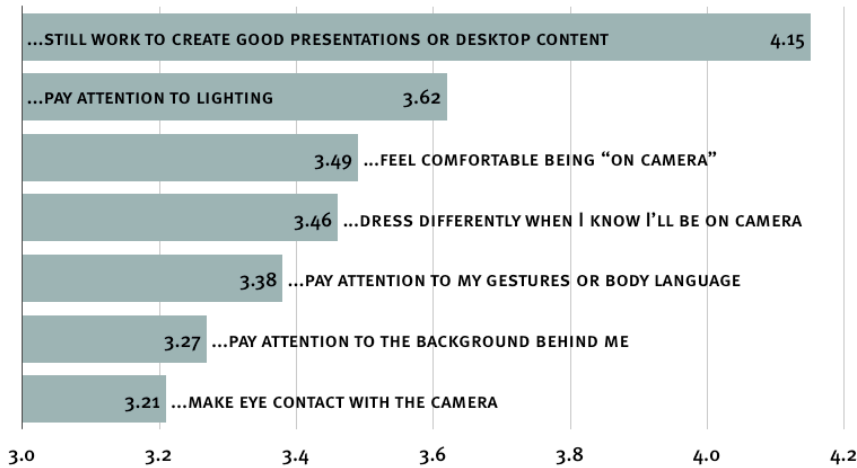


Figure 4 – Leaders rate themselves better than “neutral” (3.0) in every category

Takeaway

The single most important goal is always effective communication. Commendably, Leaders clearly focus on creating “good presentation slides or desktop content” first. However, the fact that Attendees rated every distraction/annoyance above the neutral mark likely indicates room for improvement for video conferencing Leaders who want to avoid mistakes that would detract from their effectiveness.

Personal Leadership is Key to Growing Video Conferencing Value

In the study three things emerged that suggest organizations are not experiencing as much value as they could be with video conferencing: lack of willingness to change, and challenges with usability.

When Leaders were asked how long they typically host video conferences for, the median of those responses, 60 minutes, is consistent with typical meetings. A few industries, however, are demonstrating significantly shorter average durations (high tech – 43 minutes, insurance – 30 minutes, manufacturing – 30 minutes).

When asked what most inhibits the decision to use video conferencing, the top two answers were “inability or unwillingness to use new technology” (42%) and “entrenchment of the current way we do things” (36%).

When asked about difficulties in their video conferencing experiences, the top two answers were “difficulty turning on my own video feed” (56%) and “wasted time due to technology” (50%). 93% of respondents reported experiencing at least one problem.

Takeaway

Personal leadership appears to be a significant factor as organizations adopt video conferencing into regular practice, and video conferencing Leaders have an opportunity to collaborate in this process. Given that some industries report much shorter than average usage times, it appears organizations are using video conferencing more and more like making a short telephone call. The opportunity is for all Leaders to more consciously guide the process of change.

Advice from a pro...

“I always guide my champion at the prospect or client’s company to join me before others do.

It only takes a minute to make sure everything is okay.

Then I’m free to greet others as they join. I watch the attendee panel to see when their phone or VoIP audio connects...that way I’m not talking before they can hear me.”

Peter Young
Regional Sales Director
Good Data Corporation

THE PATH TO VIDEO CONFERENCING SUCCESS: COMPETENCE, CONFIDENCE, COLLABORATION

Video conferencing is not difficult, but the “change of venue” may require applying yourself in a new way. Respondents in the survey made one thing clear: success may begin with how to use video conferencing, but it doesn’t end there. The path unfolds in three stages:

1. Competence: master your video conferencing environment
2. Confidence: develop your video conferencing skill
3. Collaboration: grow your video conferencing leadership

Competence: master your environment

Professionals who appear on camera regularly (e.g., newscasters) pay particular attention to making the entire visual experience is something that draws viewers in. While the average use of computer-based video conferencing is not a “production,” Attendees have nonetheless reported that they appreciate attention to the overall experience Leaders deliver.

Eliminate distractions from your video conferencing environment

To optimize your communication impact you want video conferencing participants to stay focused on you and your content.

- High definition video conferencing creates an excellent visual experience, including how well Attendees can see out windows, stare at book titles or cubicle decorations, or people walking by
- If hosting from a public area, situate yourself so your background is stationary (e.g., a wall)
- Improve how well you can hear and be heard with a VoIP or telephone headset. Speakerphones and computer microphones are “area” mics and will pick up a lot of background noise
- Clothing:
 - Better: solids, darker, earthy, neutral colors
 - Avoid: busy patterns, plaid, stripes, white or light colors that may wash out, things that dangle, sparkle, flash

Balance the lighting of your environment

Attendees won’t expect you to have stage and studio lighting, but it’s worth noting that 55% of survey respondents rated “poorly lit” a four or five (out of five).

- Use a quick practice session to ask a friend to offer feedback
- Avoid harsh lighting that creates undue contrast (e.g., dark shadows around your eyes, under your nose and chin)
- Be aware of washouts. For example, if you sit near a window, does it create imbalance with how it brightens one side of your face?

Position yourself back from the camera but within reach to your keyboard

Proper positioning of your computer and camera is foundational to creating a pleasing experience as you glance back and forth between camera and content.

- Position yourself a comfortable distance from the camera. Being a little farther from the camera will avoid your visual expressions from seeming exaggerated, but you still want to effectively reach your keyboard
- Avoid turning your head. If you have a separate camera, position it directly in front of you to increase head movement when you look into the camera

Tips paraphrased from dozens of respondent comments...

“Speak clearly as if to a whole room, pay attention to pace and voice skills”

“Involve every location”

“Rehearse if you aren’t comfortable with the technology”

“Be more visual, don’t rely only on the video”

“Test your audio”

“Learn facilitation skills to stay on topic”

“Get people used to frequent, light contact”

“Know when your client would *rather* meet virtually”

Incorporate other tools of engagement

To optimize productivity and Attendee engagement, plan your meeting to leverage all web conferencing features appropriate for your meeting.

- Think through what you would normally do in an in-person meeting (e.g., show something via projector, ask for a show of hands, collaborate on a task plan)
- Identify the features that enable the same productivity in the virtual environment (e.g., share your computer desktop, polling, group chat, passing keyboard/mouse control)
- Learn your tools like a dashboard, knowing where to glance when an Attendee takes an action
- Consider chat as an alternative discussion board...everyone can see each other’s answers, and you can copy/paste to save

Confidence: develop your skills

Video conferencing is easier than ever to use, but turning on a camera doesn’t ensure success any more than picking up a telephone ensures a successful conversation; it is not difficult, but it is a little different. Survey respondents not only made this clear in their quantitative responses, but additional comments they provided reinforced the need for Leaders to also develop soft skills.

Know what Attendees are seeing

To guide others you must be able to confidently understand what they are experiencing.

- Conduct a quick practice session with a friend joining as an Attendee
- Note what occurs for the Attendee as you use different features of the video conferencing solution
- Learn how to guide Attendees to better interact

Adjust your body language for the camera’s eye

Unlike presenting in-person where gestures should be big enough for back of the room, video conferencing changes your Attendees’ experience.

- Remember that the closer you are to the camera, the larger your facial and physical gestures will appear (good or bad). Make deliberate, smooth movements
- Develop awareness of your camera’s visual range. Keep your gestures or demonstrations “on screen”
- Ask for honest feedback about how your expressions and gestures appear

Make eye contact definitively

In a video conference, the camera is where we deliver “eye contact” to make our attendees feel connected.

- Remember: eye contact does not have to be persistent, but it does need to be purposeful
- Set the meeting tone with purposeful eye contact during meeting/presentation openings and closings
- When making eye contact with the camera, “finish the phrase” before looking elsewhere to avoid appearing shifty or flighty
- Throughout the meeting keep eyes within camera range (i.e., not looking out a window or someplace off camera)

Eliminate behavioral distractions

Attendees’ top complaint in the survey was “distracting mannerisms or gestures,” indicating a need for increased self-awareness on the part of Leaders of behavior that may detract from their communication effectiveness.

- Identify potentially distracting behavior (e.g., clicking or tapping a pen, fixing hair or clothing in the camera’s view)

- Ask a friend to help, perhaps using private chat to remind you during a meeting
- Extend your awareness to off-camera activity that may be picked up aurally (e.g., rattling papers or keys, music or chatter)

Advice from a pro...

“Many people keep doing what they’ve always done.

It’s not always that they don’t see benefit in video conferencing, but sometimes they need a helping hand to develop confidence that it will work for them.”

Phil Montero
CEO
TheAnywhereOffice.com
YouCanWorkFromAnywhere.com

Collaboration: grow your leadership

As an enhancement to the existing ways we communicate, video conferencing doesn’t mean other forms of communicating (e.g., face-to-face meetings or telephone calls) are obsolete. There is, however, the problem of “leaving money on the table” for those who have not adopted video conferencing into regular practice. Collaborative leadership can change that.

Be the example of “guiding the experience”

Leadership is, in part, willingness to help others navigate change. In many instances, organizations would benefit if those with experience “teach as they go.”

- Include instructions in your meeting invitation for how to have a successful meeting (i.e., “if it’s your first video conference, plan join a few minutes early)
- Verbally remind Attendees during the meeting of what to do. Examples: “To adjust your audio level...” or “In the lower right hand corner you will see...”
- Know your opening content so you can make eye contact with camera

Don’t ignore effective virtual presentation and facilitation skills

Many survey respondents used the opportunity to share comments beyond the survey questions themselves, including reminders that presentation and facilitation skills remain important in virtual meetings.

- Plan shorter, more interactive sessions
- Design visually engaging slides or desktop content
- Extend your “virtual body language” by using annotations to direct attention
- Ensure your on-camera actions (e.g., holding up an object, demonstrating a physical action, writing on a whiteboard) are clearly visible
- Read 1080 Group’s *Engage! How to Avoid the Seven Deadly Sins of Online Presentations* <http://bit.ly/nY1vdA>

Treat mixed audiences equitably

The most difficult meeting scenario to manage is when some Attendees are virtual and others are in a physical room.

- Be aware of how each Attendee or group will see, hear, and interact
- Plan how you will help each Attendee participate (e.g., contribute to the discussion, show a document, chat, etc.)
- Adjust how you will see and hear (i.e., not all Attendees will be logged in to the video conference so you can remember and reference their name)

Add “meet now” to your team’s collaboration skills

Sometimes a picture is literally worth a thousand words. Video and web conferencing do not have to always be a “meeting” you schedule out into the future.

- Locate (and install, if necessary) your solution’s “meet now” or “instant meeting” function
- Transform a phone call into a short collaborative “get it done now” video conferencing session

THE BOTTOM LINE

Of the 1188 survey respondents, one group was most enthusiastic about the benefit of video conferencing: those with the most experience. When asked if video conferencing helps their organization achieve productivity objectives, 64% agreed while only 3% disagreed. And fully 79% agree that it helps them stay more connected with others they don't see regularly (versus 3% who disagree).

Their clear message: there should be no surprise at the rapid growth of video conferencing.

Boost your productivity

As noted in the opening analogy of this paper, a fundamental shift in productivity is occurring. Indeed, this author argues that collaborating with video conferencing goes beyond telecommuting (which implies you are still "not at the office") to "workshifting" ...the ability be productive at your discretion, without the bounds of location.

Discover what's beyond "saving travel costs"

Video conferencing certainly does include replacing the expense of travel, but as survey respondents noted, the value does not end there. Perhaps the most interesting finding of the survey isn't just that respondents ranked something higher than saving money, but that in every category of benefit, Leaders of video conferencing ranked that benefit more highly than those who had no experience with video conferencing or whose experience was as Attendee only.

Create value through collaborative leadership

As Chris Brogan notes in *Trust Agents*, "Trust agents...realize the value of our networks isn't in their ability to ask for things, but in their ability to complete projects faster, find resources more easily, and reach the right people at the right time."

Desktop-based video conferencing isn't hard, but it is a different way to connect, to develop relationships, to get things done. And for those transform to grow, it's likely that many "aha!" moments await.

* * *

About Roger Courville and 1080 Group, LLC

Roger Courville is author of *The Virtual Presenter's Handbook*, contributing author to *Business Expert Guide to Small Business Success*, and Principal at 1080 Group, LLC. An internationally sought-after communicator on virtual presentations (webinars). Roger has delivered webinars for tens of thousands, and he's reached tens of thousands more with clients such as American Management Association, *Training Australia Magazine*, eLearningGuild, and, of course, Citrix Online. His 2008 paper *Five Keys to Moving Training Online* won TrainingZone.co.uk's Reader's Choice Award for "Top Download of the Year." His real-world expertise is backed by that of the seasoned team at 1080 Group who together have worked with hundreds of clients on thousands of webinars involving more than a million attendees. For more information visit www.1080Group.com, call +1.503.476.1080, or subscribe at <http://bit.ly/cyKZUJ>.

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VIDEO CONFERENCING CHECKLIST

Save this checklist for easy reference

 Step	Questions for Action
<input type="checkbox"/> <i>Eliminate distractions from your video conferencing environment</i>	What do Attendees see besides you? Are there any objects or situations they might find distracting? Are there any noises that might be picked up by your phone/microphone?
<input type="checkbox"/> <i>Balance the lighting of your environment</i>	How evenly will Attendees see you? Is there light coming from somewhere else (like a window or directly overhead) that might create imbalance or harsh shadows?
<input type="checkbox"/> <i>Position yourself back from the camera but within reach of your keyboard</i>	Are you back far enough from the camera so it doesn't exaggerate your gestures and expressions? Can you still reach your keyboard/mouse so you can comfortably manage the meeting?
<input type="checkbox"/> <i>Incorporate other tools of engagement</i>	Have you planned your meeting/presentation to take full advantage of the tools that will help you interact with Attendees? If you're just getting started with video conferencing, have you identified at least one that you will learn during this meeting?
<input type="checkbox"/> <i>Know what Attendees are seeing</i>	Are you comfortable with what the Attendee view looks like? Have you thought about how you might give them direction so they can fully participate?
<input type="checkbox"/> <i>Adjust your body language for the camera's eye</i>	Have you developed awareness of your camera's visual range? Are there any gestures (small or large) that need to be adapted so your communication is effective?
<input type="checkbox"/> <i>Make eye contact definitively</i>	Are there certain parts of the meeting or presentation that you've planned to make good eye contact with the camera (e.g., the open or close)? Have you practiced "finishing the phrase"
<input type="checkbox"/> <i>Eliminate behavioral distractions</i>	Have you identified things you do which Attendees may find distracting or annoying? If not, have you asked a friend to privately chat you a reminder if something you do detracts from your effectiveness?
<input type="checkbox"/> <i>Be the example of "guiding the experience"</i>	Does your invitation help Attendees know what to expect? Are you prepared to remind Attendees what to do to have a good experience?
<input type="checkbox"/> <i>Don't ignore effective virtual presentation and facilitation skills</i>	Have you planned how to keep the meeting interesting and interactive? Do you have other visually engaging content (e.g., visually appealing slides or desktop content)?
<input type="checkbox"/> <i>Treat mixed audiences equitably</i>	Are you aware of how each Attendee or group will be joining your video conference? If some are online and others are in a conference room, how will you see, hear, and interact?
<input type="checkbox"/> <i>Add "meet now" to your team's collaboration skills</i>	Are your video conferences always scheduled meetings? Have you located and learned the "meet now" ability of your solution?

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