



Effective Online Meetings Seven Ways to Boost Your Virtual Meeting IQ

Today's global business environment demands that everyone seek ways to optimize their budgets, respond nimbly to changes, and improve productivity. For anyone who leads meetings, this means the question isn't *if* some meetings will need to be online, but *when*.

Live, online meetings represent a major advance in organizational effectiveness that can no longer be ignored. But hosting a meeting with participants you can't see changes the dynamic of communication and collaboration.

The good news: interactivity doesn't need to be sacrificed, and you will find new ways to be productive that are unique to working online.

This handout complements the September 18, 2009 webinar sponsored by Citrix® GoToMeeting® Corporate entitled *Effective Online Meetings: Seven Ways to Boost Your Virtual Meeting IQ*.

If you made it to the live event, thank you! If for some reason you couldn't, I'd encourage you to review the recording because this handout is a high-level summary and isn't designed to deliver every detail from the presentation.

To your growing success with online meetings,

Roger Courville
Principal, 1080 Group



Preparation: Ask all participants to join from their own computer

A communication medium changes how messages are transmitted and received. To optimize your ability to connect with everyone in the meeting, *and* to enable *them* to participate most effectively, each person in the meeting needs equal access...an equal "chair at the table" if you will.

Take Action

1. *Think "move the needle."* You don't get 100% participation or eliminate multi-tasking in face-to-face meetings, and you won't online, either. But you can take steps to help those who are willing and coachable – sometimes you will still need to use the same skills you've



- developed for dealing with a remote room full of people who are all on one speaker phone.
2. *Provide explicit instructions and benefits in your invitation.* Don't assume invitees will know what's best, and don't let inertia carry them down the hall to a conference room where they're used to huddling around a speakerphone. Remind them that, "to optimize your ability to ask questions, provide input, and interact with other meeting participants, please join from your own computer."
 3. *Plan to go the extra mile to include everyone.* For example, where once you pointed or looked at someone to indicate to them you want their response, online you may change to asking verbally, "Julie, what do you think?"

Preparation: Choose meeting tools based on meeting objectives

The power of any tool isn't just that it exists, but also that you use it in the right context. During the webinar we looked at how, as your communication needs change, the way you use a feature in your web conferencing solution may change to enable that communication. Remember there are no hard rules – let your meeting objectives with your audience will determine your needs, and you may plan to change (i.e., turn on/off a feature) on-the-fly.

	Collaboration	Presentation
Chat:	Facilitates open dialogue with all participants	Use for structured Q&A
Mouse/keyboard presentation control:	Most, if not all, participants may use	Used by select, planned participants use
Annotations:	Most, if not all, participants may use	Used by select, planned participants use
Attendee list:	Usually shared for all to see	May be hidden from non-presenters
Audio:	Open, all-lines-live; selective mute/unmute	Participants often muted and instructed to use Chat

Take Action

1. *Answer, "How would you have attendees participate if this was in person?"*
2. *Learn what tools you have available to facilitate collaboration and communication.*
3. *Map participant roles to tools.* Be sure to prepare them in advance or be prepared to coach them during the meeting.

Collaboration: Turn your agenda into a working document

In this section we changed from PowerPoint to a live desktop share of a Word document. The objective was simple: demonstrate that by moving the meeting agenda from a PowerPoint slide to a working document that we can take notes, assign action items, etc. Benefits: save transcribing whiteboard notes, make it easy to quickly share after the meeting, use it as an ongoing, 'living' document.

Take Action

1. *Use a medium/large font.* You don't have control over the screen size and resolution of a participant's monitor, so make sure they can read it easily.
2. *Reiterate meeting instructions in the agenda header.* Don't assume your participants will know intuitively how to translate offline behavior online.
3. *Use verbal confirmations.* Ensure that participants can effectively read the agenda and what you need from them to contribute to the process.





Collaboration: Capture brainstorming and “parking lot” items using chat

Ever wish you could save the time of transcribing a whiteboard after a brainstorming session (or save the trouble of reading someone’s handwriting when doing so)? What if you could easily capture someone’s thought or question for later discussion when it’s outside the scope of the meeting objectives? Capturing chat to use in another document is easy, and this is most useful if your web conferencing solution captures chat content in a log or report that you can access after the meeting.

Take Action

1. *Reiterate (again!) to meeting participants what they need to do.* Example: “To submit an item for future discussion, simply chat it to me saying, ‘Future discussion item:...’.”
2. *Edit and share the chat.* This content might be useful to append to the active agenda/meeting notes before you send it to participants, or it might be the foundation of a different document.

Presentation: Engage visually by thinking visually

Web conferencing provides a significant benefit beyond just a conference call: the ability to engage your meeting participants visually. A visual doesn’t necessarily have to be a photograph; it can be any way of making your point that assists the talk track of your presentation. Important: in the webinar we showed examples of what to do about bullet-point and/or data heavy slides - watch the recording to review.

Take Action

1. *Identify the key point of the slide.* Having only one point per slide makes it easier to figure out a visual that assists you in making that point.
2. *Put the point in the slide title.* Remember assumption #1 (some of your audience *is* multi-tasking)? If your point is important, make it easier for them to get it.
3. *Brainstorm visuals that have one or more of the following qualities:*
 - a. *Quickly grasped.* Does the visual help make the point more quickly?
 - b. *Memorable.* Does the visual help the audience remember?
 - c. *Emotional connection.* Does the visual assist by telling a story, providing context?

One other thing: during the presentation, I mentioned a book and blog where the ‘chart about charts’ could be found. Here’s a link:

http://www.extremepresentation.typepad.com/blog/2006/09/choosing_a_good.html

Presentation: Learn to dialogue naturally using tools

Airplane pilots learn to fly by sight and instinct, but they also must learn to fly by their instruments. Just because you can’t see your meeting audience face to face doesn’t mean you can’t connect with them naturally. Remember the results of the recent research study: audiences overwhelmingly dislike presenters reading slides or scripts (you can find the paper here:

<http://www.thevirtualpresenter.com/?p=541>).

Take Action

1. *Value authenticity over perfection.* People connect with people first.
2. *Make “eye contact” with your audience via your web conferencing tools.* Watch you audience and glance at your notes, not the other way around.





Follow up: Use recordings *and* handouts to optimize productivity

Offline, capturing a meeting or presentation in a recording is costly and time consuming. Online, it's pushing a button. You may not need every meeting recorded, but many meetings where recordings may have been 'nice to have' are a snap online.

What we don't recommend is handing out slides. Reason: great presentation slides make lousy handouts. And handouts make lousy slides. Collaboration and presentation are both audio-visual communications. Slides alone are not. For more on the topic, check out this blog post:

<http://www.thevirtualpresenter.com/?p=156>.

Take Action

1. *Make/distribute meeting recordings.* Some meeting content such as a live demonstration won't be in the handout.
2. *Invest in your audience with a handout.* For meetings, share the active agenda, brainstorm items, action items. For presentations, summarize key points.

About 1080 Group, LLC

Roger Courville is a ten-year veteran of web seminars and presentations – from startup to Microsoft to co-founding two companies with partner and industry veteran Scott Driscoll. 1080 Group is a training and consulting firm providing companies with knowledge and skills to better communicate and compete with virtual presentations by teaching trainers, marketers, and salespeople how to design, promote, and deliver innovative web seminars and presentations. Our team has a collective experience that includes hundreds of clients, thousands of web seminars, and more than a million web seminar attendees.

Additional 1080 Group Resources:

www.theVirtualPresenter.com - Roger's blog and book (*The Virtual Presenter's Handbook*)

www.twitter.com/1080Group - Roger on Twitter

www.webseminartips.com - one web seminar production tip, twice monthly

www.webseminartoolkit.com - tools, templates, and wisdom for web seminar producers

About this Document

This is a handout for participants in the September 2009 webinar series sponsored by Citrix Online. The guest presenter was Roger Courville, Principal at 1080 Group. Its intended use is as a supplement to the content presented that is now available online as a recording, but does not represent a summary of the presentation. Links provided in this document were working at the time of its creation but may change over time, and they lead to content publicly available on the web. Please respect the intellectual property rights of those website owners.



Virtual Meetings Checklist

Keep this checklist as a reference.

 Step	Questions
<input type="checkbox"/> Preparation: Ask all participants to join from their own computer	Have you planned to “move the needle” with multi-taskers? Have you provided explicit instructions and benefits in your invitation? Have you determined how you will make effort to include every participant?
<input type="checkbox"/> Preparation: Choose meeting tools based on meeting objectives	Have you thought through how attendees would participate in this meeting were it in-person? What web conferencing tools are available to you? Have you mapped participant needs to the tools you need to use?
<input type="checkbox"/> Collaboration: Turn your agenda into a working document	Have you chosen a font that’s large enough to be read clearly? Have you reiterated your participant instructions in the agenda header? Do you need to make a note to remind yourself to give meeting participants verbal instructions about how to participate?
<input type="checkbox"/> Collaboration: Capture brainstorming and “parking lot” items using chat	Have you given attendees instructions about how to participate (again!)? How does the captured chat log need to be edited before it’s shared? Should the shared chat log be part of the working agenda, or should it be a separate document?
<input type="checkbox"/> Presentation: Engage visually by thinking visually	What is the key point you are making on a slide? Have you put the key point in the title of the slide? What images, graphics, or charts would help to make that point? Is the image easily grasped and persuasive?
<input type="checkbox"/> Presentation: Learn to dialogue naturally using tools	Are you committed to the idea that your audience values your authenticity more than your perfection? Have you rehearsed your presentation so that you are not tempted to read what is on the slides? What webinar tools will you use to “keep an eye on” your audience?
<input type="checkbox"/> Follow up: Use recordings and handouts to optimize productivity	Have you learned how to record the meeting and share the recording? Who should receive a link to the recording? Are you committed to the idea that visual slides usually make poor handouts? What form of handout would best serve meeting participants?

For additional ideas about effective online presentations, visit www.TheVirtualPresenter.com