

# Virtual Team Work

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# Chapter 1: Introduction

## 1.1. Introduction

In CISV International, people work most of the time in the virtual world. Our International committees work throughout the year via the new telecommunications system.

A Virtual Team leader, while leading the team, has to deal with two important tasks at the same time:

First, when communicating with the team, he or she needs to choose the best telecommunication tool in order to achieve group goals. In other words, to make sure that technology is serving the team and not the other way around.

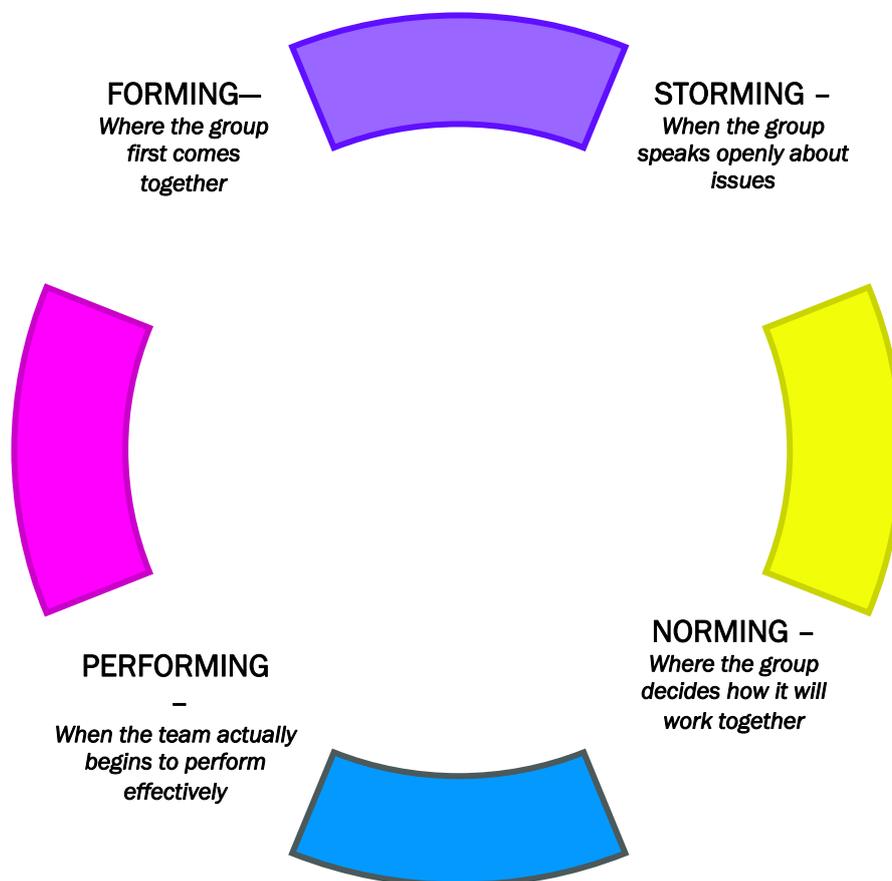
Second, although choosing the technology is important, the Team Leader should not forget to manage the human and social processes on the team. In other words, building and maintaining trust and relationships; maximizing the potential and ability of each person; and increasing the overall performance of each team member.

This document will begin by defining the concept of teams and virtual teams. It will then go on to present some of the challenges that virtual teams face, and show how a virtual team can overcome these challenges. This segment will also identify some of the more practical aspects of virtual team work, such as the key elements needed to build successful teams, leadership, relationships and trust. Some time will then be spent examining some of the collaborative communication tools that exist, what the best uses are for each of these tools, and which ones are applicable to CISV International. Finally, some practical guidance will be given on how to prepare for and conduct virtual meetings.

## 1.2. What is a Team?

Before we can define a Virtual Team, it is important to have a clear understanding of what a Team is. According to Katzenbach & Smith<sup>1</sup> the definition is: “A Team is a small number of people with complementary skills who are committed to a common purpose, performance goals and approach for which they hold themselves mutually accountable.”

A team, just like most groups, goes through various stages of development. Charles Handy<sup>2</sup>, in his book *Understanding Voluntary Organizations*, describes Tuckman’s famous model of team development:



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<sup>1</sup> Katzenbach, R. Jon & Smith, K. Douglas. (1998), *The Wisdom of Teams*, Cambridge, McGraw – Hill International (UK) Limited.

<sup>2</sup> Handy, C. (1988). *Understanding Voluntary Organizations*. London: Penguin Books

Going through these various stages to become an effective group can present many challenges for teams that are working in the same location. When teams, begin to operate on a global level, however, a number of added challenges are present that can have an impact on team effectiveness. While these teams are not only geographically dispersed, many of them function in a completely virtual environment.

### 1.3. What is a Virtual (International) Team?

***Virtual space, virtual organizations, and virtual teams: the word "virtual" is today's organizational buzzword .***

Lipnack & Stamps<sup>3</sup>, defined a virtual team as: "A group of people who interact through interdependent tasks, are guided by a common purpose, and work across space, time and organizational boundaries with links strengthened by webs of communication technologies."

Bal et al<sup>4</sup>, characterize Virtual Teams as follows:

- ★ Team members are goal oriented
- ★ Team members are dispersed geographically (nationally or internationally)
- ★ The team works apart more than in the same location
- ★ The team is collection of individuals who work together to attain goals by using computer supported networking
- ★ Team members are mutually accountable for team results
- ★ Tasks are often highly complex and strategically important (Maznevski & Chudoba<sup>5</sup>)

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<sup>3</sup> Lipnack, J., Stamps, J. (1997), *Virtual teams: Reaching Across Space, Time and Organizations with Technology*.

<sup>4</sup> Bal, D.J., Wilding, R. & Gundry, J. (2000), *Virtual teaming in the agile supply chain, The International Journal of Logistics Management*.

<sup>5</sup> Maznevski, M.L. and Chudoba, K.M. (2000). *Building space over time: global virtual team dynamics and effectiveness. Organization Science, Vol. 11, No. 5, September-October, pp. 473-492*

Like many other groups of people who work together, there are pros and cons to virtual (international) teams. Members who work in these groups should be aware of the advantages and disadvantages surrounding this type of set up in order to move through the life cycles of teams and, thereby increase overall team effectiveness.

PROS	CONS
<ul style="list-style-type: none"> <li>✓ Creating culturally inclusive solutions</li> <li>✓ Foster innovation</li> <li>✓ Encourage greater openness to new ideas</li> <li>✓ Lead organizations to improved growth</li> <li>✓ Strengthen organizational ties</li> <li>✓ People can work from anywhere at any time</li> <li>✓ People can be recruited for their competencies, not just physical location</li> </ul>	<ul style="list-style-type: none"> <li>✗ Members pressuring each other to focus on local priorities</li> <li>✗ National competitiveness and interests</li> <li>✗ More lengthy decision-making process</li> <li>✗ Increased stress and conflicts due to miscommunication and different working styles</li> </ul>

*Adapted from various sources<sup>6</sup>*

## 1.4 What are the specific challenges of Virtual (International) Teams?

★ The main challenge of a Virtual Team is to understand that, anything that goes wrong in face to face meetings also goes wrong online, only faster and less gracefully.

★ Virtual Teams work across time, space and cultural boundaries, they are able to do so due to the development of technology. One of their challenges is to adapt the new telecommunications tools, applications and systems that are now available, as well as to learn how to use them.

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<sup>6</sup> Canney Davison, S. (1994). *Creating high performance international teams. Journal of Management Development. Canney Davison, 1994 Vol.13, No. 2, pp. 81-90;*

*Kerber, K.W. and Buono, A.F. (2004). Leadership challenges in global virtual teams: Lessons from the field. SAM Advanced Management Journal, Autumn, pp. 6-10;*

*Zakaria, N., Amelinckx, A and Wilemon, D. (2004). Working together apart? Building a knowledge-sharing culture for global virtual teams. Creativity and Innovation Management, Vol. 13, No. 1, pp. 15-29*

- ★ At the same time they focus on the technology, another challenge is not to forget to focus on the human resources and the social processes.
  
- ★ Different cultural backgrounds, which brings some other challenges, like the need to work in different time zones, differing technical skills, different styles of work, how to work within different languages, and cultural diversity. Additionally, since non-verbal cues such as facial expressions, are missing, communication can be more difficult among team members
  
- ★ A Virtual Team member, on a daily base, is working alone, which puts him or her in a conflicting position: he or she is working both as "me" – an independent individual, and as "we" – an interdependent part of the team.
  
- ★ A Virtual Team member must be able to multi-task. He or she needs to divide his or her time between face to face work, virtual work, family, friends etc...
- ★ Building trust among the team when members rarely, if ever meet face to face can be challenging
  
- ★ Conflict among team members which can arise from misunderstandings due to communication challenges, different cultures, norms, values, work styles and so on.

## Chapter 2: Virtual Teamwork

### 2.1. Introduction

Talking about Virtual Team work means that we can work together and apart at the same time. In order to enable the team members to do so, the Team Leader, should be aware of the needs of team members, and must support them on the professional level as well as on the personal level, both as individuals as well as part of a team. This chapter will start by examining the nature of virtual teams, and how teams have changed over the last several years. The factors that have an impact on effectiveness and performance will then be studied. Finally, the human and social processes of virtual teams will be considered by looking into elements such as leadership, relationships, trust and communication.

### 2.2 The Changing Nature of Teams

Over the last several years, changes in organizations have meant that the ways teams form and operate have also changed. These same changes apply to CISV and can help us understand the elements needed for effective team work.

Teams have changed<sup>7</sup>:

<b>From:</b>		<b>To:</b>
Fixed team membership		Shifting team membership
Team members are dedicated 100% to the team		Most people are members of multiple teams
Teams have a fixed starting and ending point		Teams form and reform continuously
Teams are managed by a single manager		Teams have multiple reporting relationships with different parts of the organization at different times

<sup>7</sup> Kimball, L. (1997) *Managing Virtual Teams* retrieved from [www.groupjazz.com](http://www.groupjazz.com)

## 2.3 Factors Contributing to Successful Virtual Teams

When we come to build or to work together as a team, we need to understand the factors that help the team to become effective and get the best performance.

☞ Effective teams should have a **small number of members**. That will give a range to hear from everyone in the team, to be able to have more than one opinion, and still be able to come to decisions. A good size to work with will be 12-15 members (but no more than 25 members).

☞ Each one of the team's members needs to have **Interpersonal skills** in order to work within a team as well as the **Technical or functional skills** that will contribute to the team work. Working in a virtual environment, the team members need to have knowledge of **how to use the telecommunication tools**. In addition, building relationships and trust among team members is vital, not only to ensure team goals are reached but also to successfully manage any conflicts that may arise among group members.

*(To find what kind of skills your committee need go to the committee Job Profile).*

☞ Working as a Team, the members need to have a clear view of the way the team functions. For that the team needs to invest time and effort to create, shape and agree on **Common Purpose**. In fact this mission is an on going mission as long as the team exists.

In a virtual team having a clear and accepted purpose is perhaps even more important than for teams that can meet face to face. In the virtual space, the team members can easily lose the focus of what, why and how things have to be done.

*(To find your committee purpose goes to the committee Job Profile).*

☞ It is very important that the team's working plans will be **Measurable** (S.M.A.R.T.). And **Performance** of the team will be shown to the whole organization. By having measurable and SMART goals, each team member will be held accountable for both overall individual and group performance. (To know more about SMART see;

<http://resources.cisv.org/docs/main?action=document.view&id=503>)

☞ Team members need to **Clarify their Roles and Responsibilities** by developing their **Working Plans** together. In that way you give each one of the team's members the opportunity to contribute based on his or her specific knowledge, skills, interest and perspective. In this way, the working plans will be achievable. Now, each team member will have an overview and a better understanding of team plans and who is responsible for what. Clarifying roles and creating working plans will also give team members a higher commitment to the group and desire to fulfill accepted tasks.

*(To find your committee working plans go to the committee plans report at the AIM papers or to the committee Job Profile).*

☞ Consistent, constant and regular **Communication** is necessary to keep team members informed of progress within the team. Communication can be greatly enhanced by having regularly scheduled **Meetings** to keep up-to-date with activities and projects.

☞ Already a fundamental issue within CISV, successful team members must possess **InterCultural Competence**. To be effective, the team must understand and appreciate the different cultural backgrounds, languages and of various team members and find working styles and methods that best address individual as well as team needs. Of importance is the ability to establish and maintain relationships; to communicate – with minimal loss or distortion; and, to collaborate with others to accomplish something of mutual interest. Intercultural competence can be accomplished by following Fantini's (already used within CISV) A+Ask Model: Knowledge + Skills +Attitudes +Awareness.

☞ Successful teams will plan not only for the present but for the future as well. This means teams must also focusing on **Recruitment and Succession Planning** to ensure the right mix of skills, knowledge and experience are present now as well in the years to come.

☞ **One for all and all for one** – when it happened you have a team. Successful teams usually **Promote Interdependency** among its members and build on the understanding of shared responsibility and dependence for achieving group goals

## 2.4 Virtual Team Leadership

Leadership is a dynamic process which motivates employees to implement their tasks, and it is created during the administration work of the leader. To fulfill these tasks, as well as could be, the Virtual Team Leader needs to be aware of few points:

- ★ People who work in the virtual world are working almost half blind. On the one hand, they depend on others to update them about what is going on. And on the other hand, during communication process with the other team members, they miss the communication tools and cues that help them survive in face to face meetings.
  
- ★ People who work in the virtual world tend to file along, mostly because at the end of the day they are sitting alone in front of the computer and doing their work alone.
- ★ Leadership in Virtual Teams is changing and rotating. One reason is because we tend to have different coordinators for different projects. And another reason is due to different time zones or different roles. Also several people on the Virtual Team can have a leadership role (e.g. Chair, Alternate Chair, Team Leader, and Project Leader).
  
- ★ Virtual Team members have other priorities and obligations which the leader may be interrupting. Since the leader can't see them, he or she doesn't know what their activities are at the moment.
  
- ★ In a Virtual Team, every small problem or misunderstanding could easily become a big conflict and cause a loss control. When a team member doesn't feel comfortable, is not satisfied with the team or the given task, and doesn't know the other team members well, it is easy to lose focus and blame others instead of taking responsibility.
  
- ★ High and qualitative performances require effective facilitation of the team, which include coordination and mutual assistance among the team members, planning the work, and commitment from each one of the team members to the team.

### **So what can Team leaders do?**

There are several steps that Team Leaders can take to ensure they are adequately building, managing and supporting their teams:

1. Virtual Team Leaders should ask themselves the following question:

***“How can we move these virtual chairs into a circle so everyone feels involved?”***

To better build and support the team, Team Leaders should<sup>8</sup>:

- Manage the flow of work within the group
- Bear in mind that leadership is a dynamic process
- Consider that team work is fundamentally social
- Share and gain knowledge through observation and participation
- Create new ways for team members to experience membership
- Engagement is inseparable from empowerment
- ‘Failure’ to perform is often the result of exclusion from the process

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<sup>8</sup> Kimball, L. (1997) *Managing Virtual Teams* retrieved from [www.groupjazz.com](http://www.groupjazz.com)

2. Useful strategies for supporting virtual teams can include<sup>9</sup>:

Goal	Strategy
<input checked="" type="checkbox"/> Create communications mechanisms for teams (and leaders) to reach out and communicate with others	<ul style="list-style-type: none"> <li>→ <i>Form and share knowledge on the basis of information pull from individuals</i></li> <li>→ <i>Do not do a centralized push for knowledge</i></li> <li>→ <i>Shift focus from collecting and disseminating information to creating mechanisms to facilitate communication</i></li> </ul>
<input checked="" type="checkbox"/> Transform an individual's personal knowledge into organizational knowledge	<ul style="list-style-type: none"> <li>→ <i>Foster comfortable and inclusive environments</i></li> <li>→ <i>Encourage members to share what they know</i></li> <li>→ <i>Use informal conversations or communications tools to avoid burdensome tasks</i></li> </ul>
<input checked="" type="checkbox"/> Create a common ground for the team	<ul style="list-style-type: none"> <li>→ <i>Keep conversations meaningful</i></li> <li>→ <i>Provide the proper context for members (through training and developing members)</i></li> <li>→ <i>Ask for input from team members on projects and tasks</i></li> </ul>
<input checked="" type="checkbox"/> Contribute to organizational learning	<ul style="list-style-type: none"> <li>→ <i>Question</i></li> <li>→ <i>Rebuild existing perspectives</i></li> <li>→ <i>Interpret and reinterpret existing frameworks and decision premises</i></li> <li>→ <i>Push the discussion deeper</i></li> </ul>

3. Virtual Team Leaders can further support their teams by ensuring the following is happening:

☞ **Facilitation** – is very critical in a virtual environment. The Team Leader's task is to ensure that relationships and rapport do not get broken and each team member is feeling comfortable.

☞ **Ongoing Updates and Full Transparency** – regarding what is going on with the different projects that the Team is working on. Regular meetings are also another way to keep high motivation and the full commitment of team members, instead of "losing" them to their other duties and outside pressures.

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<sup>9</sup> *Kimball, L. (1997). Managing Virtual Teams retrieved from [www.groupjazz.com](http://www.groupjazz.com)*  
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➤ **Regular Contact** – being in contact with team members is not an option for the Virtual Team Leader. This should be a priority task. The leader should have regular contact with the team as a whole as well as contact with individuals on a personal level. Regular communication can ensure that new tasks are being assigned, that there is regular reporting on what has been done, and to hear any concerns or new ideas the team member may have. This task of a Virtual Team Leader is much more important, especially when the team members are doing their work as volunteers.

➤ **Conflict Management** – dealing with conflicts in Virtual Teams, needs two main actions: One, to build a strong group feeling within the team based on good relationships and trust among the team members. Second, the Team Leader should identify what causes the conflict.

➤ **Reward** – one of the stronger motivational tools is Reward. The Team Leader should recognize and reward team members for their performance, time, work and knowledge. The rewards should be on personal level as well as on public level, so every one will know. Individuals, who work as volunteers, tend to view reward and recognition as payment for their commitment, work, time and knowledge.

## 2.5 Relationships in Virtual Teams

Development of a good and open relationship among the Virtual Team members is one of the keys to having a successful Team which will work effectively and show good performances. When referring to building and having good relationship in a team, we are not talking about being friends and liking each other (even though this could be nice and helpful for the team work). The idea of having good relationship is:

- ★ To build an environment, where each one of the team's members will feel safe to share ideas, to be open to others, to express opinions freely, and to engage in open and honest communication.
- ★ To be familiar with each one of team member's communication styles
- ★ To recognize the strengths and the weaknesses of each one of the team's members,
- ★ To learn how we can work with each other.

The best tool to achieve good relationships among team members is by having a face to face meeting. Working as a Virtual Team, means that we may find ourselves working with people that we didn't have the opportunity to get to know or people that we have never met. In these cases we need to find ways to go over the communication boundaries and find a way to develop an atmosphere that will enable the team to get their work done. To be able to build these relationships from a distance, it is important that the team have a:

- Common view and expectation of the team role in the organization (the committee purpose)
  
- Well known set of values and beliefs, which leads the team.
  
- Clear definition of behavior and working rules and norms, which the team accepts and agrees to as a whole (the committee rules on the roads)

## 2.6 Trust in Virtual Teams

Effective leadership and guiding of a team could be done if there are open and good relationships among the team members, based on a solid foundation of trust.

According to Mishra<sup>10</sup>, trust is "One party's willingness to be vulnerable to another party based on the belief that the latter party is competent, open, concerned and reliable".

Trust in virtual teams is more complicated than the trust structure in dyadic relationships as it is also characterized as a collective trust.

Jarvanpaa et al<sup>11</sup>, define team trust as: "A function of other team members' perceived ability, integrity and benevolence and as of the members' own propensity to trust".

Trust causes the development and protection of the team spirit by providing the necessary cooperation and building solidarity among the team members. Trust provides an atmosphere of safety for team members, and in this kind of atmosphere team members can discuss mistakes and express thoughts more freely.

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<sup>10</sup> Mishra, A.K. (1996), "Organizational responses to crisis: the centrality of trust", in Kramer, A.M. and Tyler, T.R. (Eds), *Trust in Organizations*.

<sup>11</sup> Jarvenpaa, S., Knoll, K., & Leidner, D.E. (1998), "Is anybody out there? Antecedents of trust in global virtual teams, *Journal of Management Information Systems*, Vol. 14 No. 4.

Team member needs to be sure that everyone will fulfill their obligations and behave in a consistent and predictable manner, so without taking the time to build trust, a true team is almost impossible.

The development of trust in the team life is not only an individual responsibility, but a team responsibility as well.

Building a trust among team members is an ongoing process, which includes a variety of actions on two working levels.

### ***Person to Person Level,***

- ☞ Build a personal connection between the team members.
- ☞ Keep the communication channels open all the time.
- ☞ Be accessible to everyone all the time.
- ☞ Don't disappear for long periods of time without informing your team members.
- ☞ Offer help and support to your team members.
- ☞ Show trust in your team members.

### ***Team Level,***

- ☞ Choose the right telecommunications channels that work best for team members.
- ☞ Have a clear job definition.
- ☞ Have clear working plans, where everyone in the team knows what his or her tasks, responsibilities, deadline etc...
- ☞ Keep full transparency on what is going on in the team work
- ☞ Recognize, praise and reward team members

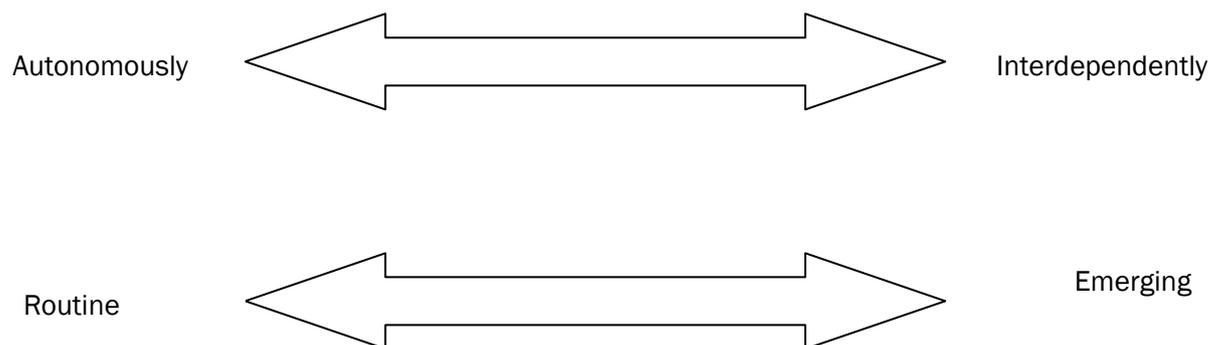
## 2.7 Communication in Virtual Teams

One of the biggest issues for virtual teams is creating an effective communications strategy. Team Leaders can encourage the team to engage in creating (and revising as needed), a strategy to ensure effective communication.

Since too much communication can be as bad as too little communication, teams can begin by asking and answering a few simple questions:

1. *What, when and how much are we going to communication?*
2. *Where and how shall we communicate?*
3. *Who will play what roles in the team's communication?*

Lisa Kimball<sup>12</sup> of Group Jazz suggests that communications among virtual groups can be looked at along 2 continuums:



The first continuum ranges from those tasks that can potentially be completed by team members on their own (autonomously), without the need to interact with others in the group to other projects within a team that may require more group communication and collaboration (interdependently). The second continuum relates more to the pattern of work completed by teams. Some tasks may be repetitive and routine from day to day, while others might constantly change and see the emergence of new patterns.

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<sup>12</sup> Kimball, L. (no date) *Developing the Team's Communications Strategy*. Retrieved from [www.groupjazz.com](http://www.groupjazz.com)

Communication patterns will, therefore, depend on whether the work is ***routine/autonomous; routine/interdependent; emerging/autonomous;*** or, ***emerging/interdependent.*** Within each of these choices, the role of the Team Leader will also shift to enable him or her to better communicate with and support team members. The following table<sup>13</sup> summarizes the key points outlined in this section.

By understanding the type of work that is being done within the team, members will be better able to choose the type of communication that is needed, the frequency of the communication, and who should be included in particular discussions

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<sup>13</sup> *Kimball, L. (no date) Developing the Team's Communications Strategy. Retrieved from [www.groupjazz.com](http://www.groupjazz.com)*

<b>What are the communications norms the team needs?</b>		
<b>When we are working...</b>		
	<b>Autonomously</b>	<b>Interdependently</b>
<p><b>When patterns of work are...</b></p> <p><b>Emerging</b></p>	<p>Communicate with team members if the work being done begins to change (or emerge)</p> <p><b>Dangers:</b></p> <ul style="list-style-type: none"> <li>▪ Missing signals if something new happens</li> <li>▪ This can affect other work the team is doing</li> </ul> <p><b>Communications should be:</b></p> <ul style="list-style-type: none"> <li>→ Timely</li> <li>→ Push v. Pull</li> </ul> <p><b>TL Role: Lookout –</b></p> <ul style="list-style-type: none"> <li>★ Identify indicators of problems</li> <li>★ Look for changes</li> <li>★ Watch for miscommunications and conflict</li> </ul>	<p>The team becomes more than the sum of its parts</p> <p><b>Dangers:</b></p> <ul style="list-style-type: none"> <li>▪ Disjointed communications</li> <li>▪ No team environment to support on-going discussions</li> <li>▪ Lack of necessary skills</li> </ul> <p><b>Communications should be:</b></p> <ul style="list-style-type: none"> <li>→ Rich</li> <li>→ Conversational</li> <li>→ Continuous</li> <li>→ Involve everyone</li> </ul> <p><b>TL Role: Facilitator –</b></p> <ul style="list-style-type: none"> <li>★ Collaborate</li> <li>★ Unify</li> <li>★ Engage</li> <li>★ Ensure team effectiveness</li> </ul>
<p><b>Routine</b></p>	<p>Little need for a lot of cross-team communication</p> <p><b>Dangers:</b></p> <ul style="list-style-type: none"> <li>▪ Disconnected feelings</li> <li>▪ Over-reporting</li> <li>▪ Information overload</li> </ul> <p><b>Communication should be:</b></p> <ul style="list-style-type: none"> <li>→ Minimalist</li> <li>→ Compliance oriented</li> <li>→ Automated where possible</li> </ul> <p><b>TL Role: Defender –</b></p> <ul style="list-style-type: none"> <li>★ Be a buffer between the team and the rest of the organization</li> </ul>	<p>Provide enough information to be able to coordinate work</p> <p><b>Dangers:</b></p> <ul style="list-style-type: none"> <li>▪ Misuse of technology – We use it because we can</li> <li>▪ Failure to address issues</li> <li>▪ No added-value</li> </ul> <p><b>Communications should be:</b></p> <ul style="list-style-type: none"> <li>→ Standardized</li> <li>→ Organized</li> <li>→ Easy</li> <li>→ Pull v. Push</li> </ul> <p><b>TL Role: Manager –</b></p> <ul style="list-style-type: none"> <li>★ Manage the team through coordination</li> <li>★ Develop team habits to make processes run smoothly and reliably</li> </ul>

## **Chapter 3: Collaborative Communication Tools**

### **3.1 Introduction**

The increase in the amount of work done by committees and teams in a virtual environment has become possible due to the high development of technology in the last few decades. The development of the internet as well as computers, allows every one of us to be connected to each other with hardly any cost.

In this chapter we will try to review the different channels and tools that are in the market and available to us. We will examine their strengths and weaknesses, and find out which is the best and effective way to use each channel / tool. It is important to remember and understand that appropriate selection of communication technology is an important aspect that affects the communication and the work of virtual teamwork.

### **3.2 Tools Review**

In order to work efficient as a team in general and as a virtual team in particular, we will view the different tools that are available for us:

## **Chapter 3: Collaborative Communication Tools**

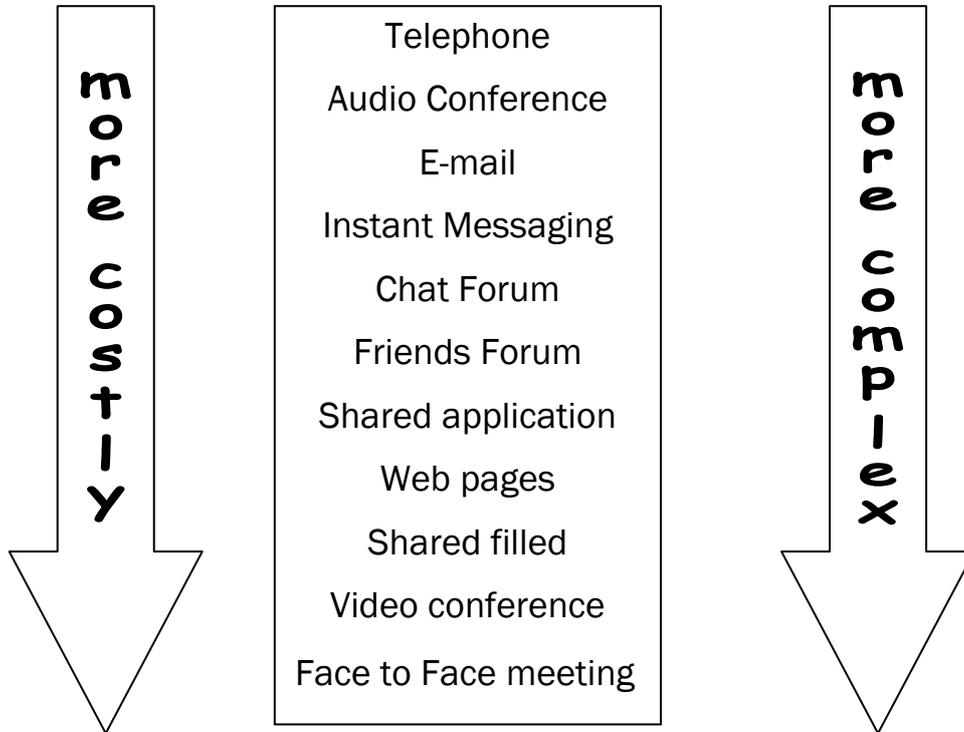
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The increase in the amount of work done by committees and teams in a virtual environment has become possible due to the high development of technology in the last few decades. The development of the internet as well as computers, allows every one of us to be connected to each other with hardly any cost.

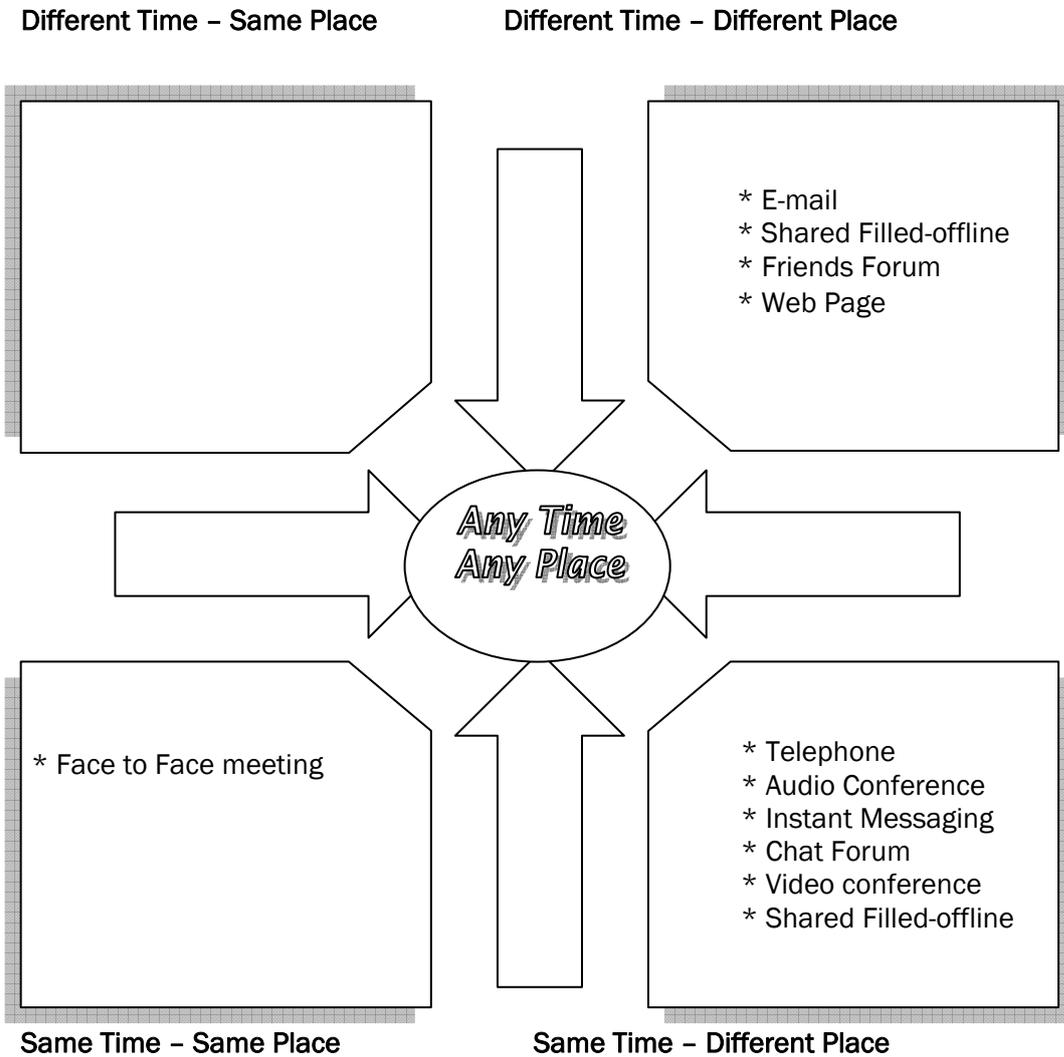
In this chapter we will try to review the different channels and tools that are in the market and available to us. We will examine their strengths and weaknesses, and find out which is the best and effective way to use each channel / tool. It is important to remember and understand that appropriate selection of communication technology is an important aspect that affects the communication and the work of virtual teamwork.

### 3.2 Tools Review

In order to work efficient as a team in general and as a virtual team in particular, we will view the different tools that are available for us:



Those tools enable us to communicate over the time and place dimensions according to the following hand out<sup>14</sup>:



<sup>14</sup> This model adopted from Bostrom, R.P., Kinney, S.T. & Watson, R.T. (1992), *Computer Augmented Teamwork*

### 3.2.1 Telephone / VOIP

#### **Description:**

Two People at two different sites can talk to each other at the same time. With the Mobile version, they can send text messages to each other.

VOIP services allow calling regular phone / other computers over the internet.

#### **Strengths:**

- Dealing with personal issues
- Decision making
- Building relationships
- To motivate people
- Explanation and clarification of complex issues.
- Old and reliable
- VOIP is free

#### **Weaknesses:**

- Hard to deal with because of time differences around the world.
- Hard to record the issues that were discussed.
- Hard to deal with details and facts or long explanations.
- Expensive
- VOIP needs broadband

#### **Best to use:**

- When urgent issues or important news arise
- When a face to face meeting is not possible
- For short messages
- To motivate people or for personal issues.

#### **Environment Setup:**

Everyone has a phone or a mobile phone.

Different companies offer different deals to call other PC / phones.

[www.voipstunt.com](http://www.voipstunt.com) offers free calls from PC to almost any landline in the world and mobile phones in USA

[www.skype.com](http://www.skype.com) offers free calls from PCs-to-PCs

#### **Alternative:**

Skype or MSN Messenger

### 3.2.2 Audio Conference

#### **Description:**

Two or more people from two or more different sites can talk to each other at the same time.

#### **Strengths:**

- Decision making
- To motivate people
- Available to everyone

#### **Weaknesses:**

- Hard to deal with because of time different around the world.
- Hard to record the issues that were discussed.
- Expensive (when Skype is free)
- All users need a skype account
- High band width required for smooth Communication

#### **Best to use:**

- Facilitation and coordination
- Regular meeting format
- To motivate and develop social relationships
- When urgent issues or important news arise
- Decision making

#### **Environment Setup:**

All the participants need to be using skype 2.5 or above. Then at the time of the meeting, we will be using the website <https://skypecasts.skype.com/skypecasts/home> they should call the created chat room. It will be able to moderate a discussion of up to 100 people, managing the speaker list and giving the "virtual microphone" to the next person in the list. If it is just a conference between 4-5 people, you can simply use the Skype software on your machine.

#### **Alternative:**

- MSN Messenger offers the same service, but is still quite buggy.

### 3.2.3 E-mail

#### **Description:**

Unlimited participants can send and receive messages from different sites at any time to each other.

The most commonly used virtual communication channel.

#### **Strengths:**

- Cost effective
- Available to everyone
- Easily used
- Fast
- Able to send attachments quickly and efficiently

#### **Weaknesses:**

- Leads to overload of information
- Leads to miscommunications due to lack of the nonverbal cues and communication.
- Leads to poor communication.
- Loss of control
- Easy to forward sensitive information to 3<sup>rd</sup> parties
- Not a reliable channel, User has to be aware of how to avoid SPAM, PHISHING and VIRUSES

#### **Best to use:**

- Exchanging information between a few people.
- Sending attachments.

#### **Environment Setup:**

Everyone has computer access.

#### **Alternative:**

---

### 3.2.4 Instant Messaging / Chat Forum

#### **Description:**

Two or more people can exchange messages from different sites at the same time to each other.

#### **Strengths:**

- Cost effective
- Decision-making on a simple issues.

#### **Weaknesses:**

- Slow conversation
- Too many people, you can get lost.
- You need to be able to type and read fast.
- Broadband unlimited connection allows for better use of these technologies.

#### **Best to use:**

- Decision -making on simple issues
- Urgent updates

#### **Environment Setup:**

Register to Instant Messenger services like MSN, AIM, SKYPE, ICQ, YahooIM or Gtalk. MSN is the more widely used.

#### **Alternative:**

---

### 3.2.5 Friends Forum

#### ***Description:***

Two people or more from different places at different times can test discussions via computer.

#### ***Strengths:***

- Cheap
- Available to everyone
- Transparency of information

#### ***Weaknesses:***

- Slow
- Each committee needs to have its own forum.
- All committee members need to login to the forum

#### ***Best to use:***

- To develop long distance brainstorming
- To leave messages within the committee
- To Share and develop ideas

#### ***Environment Setup:***

—

#### ***Alternative:***

- MS SharePoint
- MS Exchange Public Folder
- Lotus Notes
- Etc...

### 3.2.6 Web page

#### **Description:**

Anyone from anywhere, at any time, who would like to get information about the committee/ organization's work, can visit the committee/organization's webpage.

#### **Strengths:**

- Cheap
- Available to every one

#### **Weaknesses:**

- No Relationship
- No Discussion
- No Transparency of information

#### **Best to use:**

- To Share knowledge and information with people inside as well as outside the committee.
- Public Relationships

#### **Environment Setup:**

---

#### **Alternative:**

---

### 3.2.7 Shared Files - Offline

#### **Description:**

Two people or more at different places and at different times can work together on the same document.

#### **Strengths:**

- Transparency on the work
- Better control for the facilitator
- Available to everyone

#### **Weaknesses:**

- No Relationship
- No Discussion
- Needs commitment

#### **Best to use:**

- To write or update a document by several people.

#### **Environment Setup:**

Easy in Win, MAC and Linux.

Win with webfolder, mac with idrive and linux with gpl-software.

Example,

SERVER: <http://share.cisv.org/ijb>; USER: m.zanella@it.cisv.org; PASSWORD:

xxx).

To be effective, cooperation is necessary to use all the REVIEWING tools of the document editor as Microsoft Word.

#### **Alternative:**

---

### 3.2.8 Shared Files - Online

#### **Description:**

Two to six people at different places at the same time can work on the same document.

#### **Strengths:**

- To support people
- Ability to discuss
- Available to everyone
- Building relationships
  
- Explanation and clarification of complex issues.

#### **Weaknesses:**

- Hard to deal with because of time differences around the world.
- Needs commitment
- High bandwidth required for smooth communication, all users need a skype account

#### **Best to use:**

- To write or update a document by several people.

#### **Environment Setup:**

To be able to discuss lively a Skype account is needed. Using Skype 2.5 or above chat room up to 5-6 people can be easily created.

Only the audio link is established, the committee member which will be in charge of taking notes of the meeting can use the software plug-in for Skype called WebDialogs Unyte, to allow the other members of the committee to see the changes which are being discussed live.

#### **Alternative:**

- MSN Messenger offers the same service, but is still quite buggy.

### 3.2.9 Video Conference

#### **Description:**

Two or more people from two or more different sites can talk to each other while they see each other at the same time. Two forms:

1. Plenary Video Conference
2. Desktop Video Conference

#### **Strengths:**

- Build relationships
- Discussion
- Decision-making
- Deal with personal issues

#### **Weaknesses:**

- Plenary VC is Expensive and not available to everyone
- Quality of broadcast can be bad
- Desktop VC is best to use for 2-3 people only

#### **Best to use:**

- Alternative to face to face meetings
- Working on shared documents
- Discussion & Decision -making
- Getting to know new members
- Building social relationships

#### **Environment Setup:**

For Desktop Video Conference you required:

1. To register to Instant Messenger services like MSN, AIM, SKYPE, and ICQ.
2. To have Loudspeaker, Microphone and Camera.

#### **Alternative:**

---

### 3.2.10 Face to Face Meeting

#### **Description:**

Two or more people meet at the same place at the same time.

#### **Strengths:**

- Personal issues & relationships
- Trust Development
- Deeper rapport
  
- Deeper rapport
- Decision-making

#### **Weaknesses:**

- Expensive
- Hard to bring people from all over the world together at the same time to the same place.

#### **Best to use:**

- Build relationships among the teamwork members
- Build trust among team members
- Dealing with sensitive and complex situations
- Learning about individual communication styles.

#### **Environment Setup:**

---

#### **Alternative:**

- Plenary Video Conference

### 3.3 Conclusion

The following table<sup>15</sup> summarizes the communication styles and types that we use in our daily work, and offers recommendations for which tools should be used when.

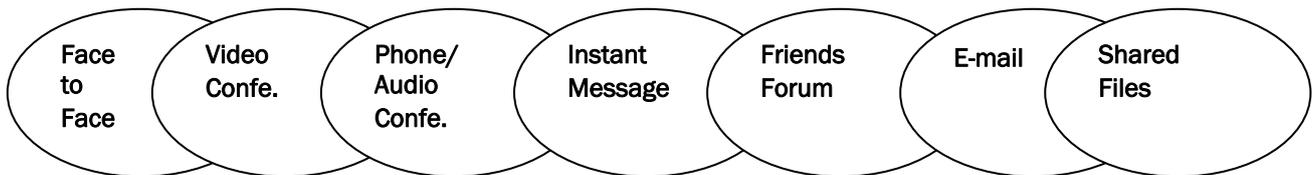
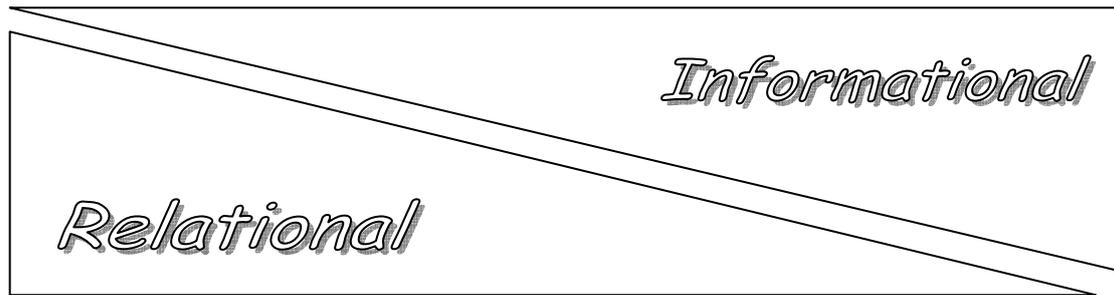
Communication Type	One on One	Team-Wide
Motivation, Commitment, Personal Issues Personal Relationships	<ol style="list-style-type: none"> <li>1. Face to Face meeting</li> <li>2. Video Conference</li> <li>3. Telephone / VOIP</li> </ol>	<ol style="list-style-type: none"> <li>1. Face to Face meeting</li> <li>2. Video Conference</li> <li>3. Audio Conference</li> </ol>
Decision Making Discussion	<ol style="list-style-type: none"> <li>1. Face to Face meeting</li> <li>2. Telephone / VOIP</li> </ol>	<ol style="list-style-type: none"> <li>1. Face to Face meeting</li> <li>2. Video Conference</li> <li>3. Audio Conference</li> <li>4. Instant Messages</li> </ol>
Collaborating and reviewing documents	<ol style="list-style-type: none"> <li>1. Face to Face meeting</li> <li>2. Shared Files</li> </ol>	<ol style="list-style-type: none"> <li>1. Face to Face meeting</li> <li>2. Shared Files</li> </ol>
Sharing documents Developing document	<ol style="list-style-type: none"> <li>1. E-mail</li> <li>2. Shared Files</li> </ol>	<ol style="list-style-type: none"> <li>1. Shared Files</li> <li>2. Web page</li> </ol>
Short factual messages	<ol style="list-style-type: none"> <li>1. E-mail</li> <li>2. Instant Messages</li> </ol>	<ol style="list-style-type: none"> <li>1. Friends Forum</li> <li>2. Instant Messages</li> <li>3. Web Page</li> </ol>
Exchanging detailed Information	<ol style="list-style-type: none"> <li>1. E-mail</li> </ol>	<ol style="list-style-type: none"> <li>1. Friends forum</li> <li>2. Shared files</li> <li>3. Web Page</li> </ol>

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<sup>15</sup> Developed by Dr. John Gundry, © Copyright Knowledge Ability Limited 2006.  
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According to Dr. Gundry, Telephone, E-mail, Audio Conference, Discussion Forums and Shared files, are the tools that help us the most to do our virtual work in the best way. As for Face to Face meetings, the best way to use those meeting is to get to know each other, develop relationships and deal with personal issues and crises.

A simple<sup>16</sup> way to look at the different tasks we have and to find the best tools to use is to find out if we want the tools to connect with people or with information.



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## Chapter 4: Good Practices for Virtual Meetings

### 4.1 Introduction

This section will examine the components necessary to hold successful and effective virtual meetings. It is important to remember that virtual meetings contain many of the same components as more traditional face to face meetings. In this chapter, we will look at meeting basics, some added factors necessary for virtual meetings as well as some practical 'lessons learned' from people who have conducted virtual meetings in the field. Additionally, the processes involved and the roles of participants will be reviewed, along with some tips for how to start and finish sessions on time. Finally, a few tips will be shared on how to conduct great virtual meetings.

### 4.2 Meeting Basics

The basic components of more traditional face to face meetings still apply when conducting virtual meetings. Good practices of meetings include:

- Determining the purpose of the meeting you will be having
  - ? Sharing information
  - ? Generating ideas
  - ? Evaluating options
  - ? Making decisions
  
- Developing an agenda
  - ❖ Provide it to participants in advance
  - ❖ Indicate who has the lead on each agenda item
  - ❖ Indicate how much time you expect to spend on each item
  
- Identifying a Facilitator and a Minute Taker
  - ? Who will lead the meeting
  - ? Who will be responsible for taking and distributing the minutes (which includes decisions, next steps, action items and who is responsible)
  - ? Who will be lead and provide the agenda for the next meeting
  - ? When will that meeting be held
  - ? Who will be the minute taker
  
- Developing Committee 'Rules of the Road'
  - ❖ How will communication occur
  - ❖ What to expect from each other

## 4.3 Virtual Meetings – All of the Above, Plus a Few More...

While successful virtual meetings must contain all the same basic ingredients of regular meetings, they require a few more details to be effective. In virtual meetings, there is an added emphasis on **Preparation** and **Communication**. Without the normal face to face contact that usually occurs during a discussion, every contact or misunderstanding is magnified. When preparing and communicating during these sessions, it is usually helpful to think of the meeting as a three-stage process: pre, during and post.

### 1. Preparation

During a virtual meeting, the facilitator or Chair will not be able to hand out material at the start of the session. The meeting Chair will, therefore, have to plan how and when to provide all team members with the necessary documents. E-mail or Fax (if a printer isn't available) are the most obvious and widely used options but Chairs must remember to allow time for sending, receiving, resending information if documents aren't received the first time, printing if desired, and reviewing the meeting documents prior to the start of the session.

So when preparing for a meeting:

- Allow for more time
- Send documents out well in advance
- Ensure all participants have received the documents at the start of the meeting
- During the meeting, make clear which document, page or agenda item is being referred to

### 2. Communication

Often, the most frequent concerns, and the ones that really have an impact on the success of the meeting, are those surrounding communication. Specifically, the loss of non-verbal communication and conducting meetings where there isn't a common first language can challenge the success of virtual meetings.

In the former, since team members are not face to face, they are unable to observe body language, or fully hear the tone of voice or intonations of other participants. Additionally, people are unable to clearly tell whether what they were communicating was actually received. Other indicators that are potentially missing in virtual sessions are whether people are listening, how long to wait for responses, and whether people are still actively

participating in the meeting (but are perhaps just quiet) or if they have been distracted by other people or things on their end – have they figuratively left the meeting?

In the latter case, since virtual meetings tend to span time zones and geographic regions, they also bring together people with different first languages. Although English is generally the commonly used language in virtual meetings, participants must remember that miscommunications can occur based on different levels of proficiency with the language. Since face to face communication isn't possible, misunderstandings concerning what is meant can arise more frequently in virtual settings.

So added concerns regarding communication are:

- Loss of face to face communication
- Loss of non-verbal cues (body language)
- Different levels of proficiency with the language
- ? Was communication received
- ? Are people listening
- ? How long should you wait for responses
- ? Are people distracted – have they figuratively left the meeting

Creating Committee 'Rules of the Road' for virtual meetings can help with many of these issues.

#### **4.4 Good Practices from Experienced Facilitators of Virtual Meetings**

Before looking at the actual elements necessary to conduct effective virtual meetings, there are some obvious and not-so-obvious lessons that can be learned from facilitators who have gained some practical experience in the field<sup>17</sup>. These 'Lessons Learned' are useful to keep in mind when preparing and holding virtual meetings. This section is designed as a resource only, for teams to be able to learn and hear from the experts on issues that may apply directly to their own Committees. Following is a summary of some of the more salient lessons learned that might provide some value and insight to Committees who hold or will be holding virtual meetings in the future. For a more in depth review of each of these lessons, please refer to the article directly.

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<sup>17</sup> Mittleman, D., Briggs, R. & Nunamaker Jr., J. (1996-1997). *Best Practices from Experiences in Facilitating Virtual Meetings. Found on the internet.*

## Lesson One

### **It is harder to follow a meeting process from a distance!**

Participants:

- Are more prone to distractions
- Are trying to accomplish multiple unrelated tasks
- May arrive late, leave early or take long breaks from the meeting
- Are unsure what meeting task is being addressed and where this item fits into the Committee goals
- Lose track of who is virtually present at the meeting and who is not
- Feel less a part of the team, which may contribute to lower commitment to meeting results

Good Practices to address this lesson learned:

- Make the pre-meeting plan very explicit – include anticipated timing for each agenda item as well as the purpose and objectives of each stage
- Engage vested interest – correspond personally in advance with each participant to ensure their attendance and that they have received the documents, to see if they have any personal goals they want to achieve and how that fits in with Committee goals
- Focus transitions – the action of moving from one agenda item to the next should be complete and explicit
- Enunciate interim goals – prioritize and set times for action items

## Lesson Two

### **People don't get feedback when working over a distance!**

- Communication through technology can be limiting and frustrating
- Often only one person can speak at a time so it is impossible for both Chairs to interrupt a speaker to get the meeting back on track and for other participants to ask for a chance to speak
- Feedback is slower or less frequent

Good Practices to address this lesson learned:

- Explicit facilitated feedback – prompt participants for verbal responses when comments are made
- Frequent process checks – check in with participants, e.g. “Tom are you still with us? Do you agree with the item discussed?”

### **Lesson Three**

#### **People forget who is at a distributed meeting!**

Participants themselves often forget:

- To provide input or feedback during virtual sessions
- Who is present at the meeting

Good Practices to address this lesson learned:

- Reflect users names when facilitating – use participant names at every opportunity
- Remind participants of who is at the meeting – verbally check in with all participants at the meeting every so often

### **Lesson Four**

#### **It is harder to build a team over a distance!**

Participants have less opportunity to engage in team building activities which is a core stage of successful team work. Lack of team building can lead to:

- Confusion over team roles
- Lack of trust
- Lack of a common team language
- Unclear team and personal goals

Good Practices to address this lesson learned:

- Achieve very clear, unambiguous goals for the team – get buy in into clear, concise and unambiguous goals to deter personal agendas from disrupting the meeting
- Where possible, have a face to face meeting – Use the AIM to meet with the Committee, create relationships and build trust among team members

### Lesson Five

#### **Network connections are unpredictable!**

Computer and communication technology can be unreliable. Different place meetings often use technologies owned or managed by different vendors. This can lead to:

- Instability
- Incompatibility
- Stone walls

Good practices to address this lesson learned:

- Assume a technology learning curve – assume setting up and getting to know your technology will take longer the first time you use it
- Have a fallback plan – in case some participants have difficulties with the chosen communication channel or if there is difficulty with the technology, have a plan in place which addresses issues such as whether the meeting should be continued, can a participant have a contact number to participate via another team member, switching to a different mode of communication etc...

### Lesson Six

#### **It is tough to sort out multiple communication channels!**

Although most of us know how to communicate in face to face meetings, it is far more difficult to communicate effectively in a virtual setting. Difficulties can include:

- People talking simultaneously
- Lack of non-verbal cues
- Use of non-intuitive messages
- Too little or too much communication

Good Practices to address this lesson learned:

- Introduce new technology only on an as needed basis – use only what is required for the task to enable participants to become comfortable with the technology and the forum before moving on to more sophisticated processes
- Separate task and process channels – some team members may feel uncomfortable asking for a clarification on certain points. As a result, he or she may not offer an opinion or participate in the group decision making process. Provide a back channel for members to contact the Chair separately from the group discussion

### **Lesson Seven**

#### **There is an art to using audio and video channels in a distributed meeting!**

Often participants:

- Have difficulty receiving real time feedback
- Lose a connection
- Experience bad connections with delays and echoes

Good Practices to address this lesson learned:

- ☑ Engage in dialogue rather than give a briefing – do not spend a lot of time making presentations. Keep the introduction of an agenda item brief and then engage in team discussions
- ☑ Stay close to the microphone – make use you speak clearly into the microphone so that all participants can hear you
- ☑ Shift focus among the different participants – rotate participation to make sure everyone is active and involved in the discussion

### **Lesson Eight**

#### **It is harder to converge over a distance!**

It can be more challenging for participants to come to decisions in virtual meetings. This can be due to:

- Difficulties with technology
- Distractions
- Increased focus on self and a decreased focus on the team

Good Practices to address this lesson learned:

- ☑ Tightly structure the convergence process – agree in advance as to how team decisions will be reached
- ☑ Hold frequent process checks – check in with participants regularly for input and agreement

## **Lesson Nine**

**Different time virtual meetings are different than same time virtual meetings!**

Often participants:

- Do not attend the meeting
- Do not actively participate in the meeting
- Are easily prone to outside distractions
- Feel isolated
- Do not get the feedback they need to motivate them

Good Practices to address this lesson learned:

- ☑ Make sure participants perceive direct vested interest in the task – team members must buy into committee and individual goals and see how what they are doing contributes to CISV
- ☑ Make sure participants know that the output of the task is valued – Provide constant feedback and recognize and reward performance of Committee members
- ☑ Develop a communication protocol for the meeting – define, in advance, what the communication process will look like during the meeting

## **4.5 The Virtual Meeting Process**

Like any good meeting, virtual meetings have three distinct stages: pre-meeting; during the meeting; and, post-meeting. By investing in time to prepare well for each session, the meeting itself will be more effective. The following guidelines can be used to help Committees prepare for every stage of a virtual meeting<sup>18</sup>.

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<sup>18</sup> Brenowitz, R. (2006). *Virtual Meeting Etiquette*. Retrieved from [www.winstonbrill.com/bril1001/html/article\\_index/articles/601-650/article601\\_b](http://www.winstonbrill.com/bril1001/html/article_index/articles/601-650/article601_b)

*Meetings 101* (2006). Retrived from [www.effectivemeetings.com/meetingbasics/training.asp](http://www.effectivemeetings.com/meetingbasics/training.asp)

*The Pennsylvania State University* (2005). *Virtual Meetings and Virtual Teams—Technology to Work Smarter. Innovation and Insight Series, No. 9*. Retrieved from the internet.

### Pre-Meeting:

Activities in the pre-meeting process generally require an investment of time to plan and make decisions that will facilitate the success of the virtual meeting.

Planning the meeting includes the following questions, decisions and actions:

- Is the meeting necessary
- What venue will be used (e.g. conference call, chat, skype, etc...)
- What technology do we need – does everyone have it
- Who should participate
- What time will the meeting be held (taking time zones into account)
- In What language will the meeting be held
- Have we set clear objectives
- Who will Chair the meeting
- Who will be the minute taker
- Has the agenda been prepared
  - setting out clear topics for discussion
  - the leader for each topic
  - the time allotted for each topic
- What materials need to be sent out to participants prior to the meeting
  - Agenda
  - Presentations/documents
  - Who will be attending the meeting along with the order for participation
  - Meeting objectives
  - Time/date/location of the meeting
  - Background information
  - Assigned items for advance preparation
- Keep the technology as simple as possible
- Have a back up plan in case technology fails

### **During the Meeting:**

Now that all of the planning has been done, participants are now ready to attend the meeting. If you are the Chair, try to check into the meeting using the technology a few minutes early to make sure things are up and running. Team members should:

- Arrive on time
- Be well-prepared
- At the start of the meeting, follow a few protocols
  - Make sure every participant says 'hello' to ensure members know who is present
  - Review guidelines and communications protocols for the meeting (see section 4.6), such as stating your name when you speak, type etc...
  - Let others know if you will be absent for a portion of the meeting
- Be precise
- Give examples to illustrate points
- Verify your understanding
- Recap and summarize often
- Use 'Round Robin' technique when appropriate
- Refer to agenda items, page numbers, etc...
- Agree on and document decisions
- Document assigned responsibility and timelines for new items and goals
- Review meeting effectiveness

### **Post-Meeting:**

Once the meeting session terminates, there is still work that has to be done. Although much of the initial post-meeting work is done by the minute taker, participants also have a role to play.

- Minutes or notes should be send out shortly after the meeting
- Participants should review the minutes upon receipt and review any commitments they have made in terms of work
- Participants must follow up on and finish the work they have agreed to within the agreed upon timelines
- The Chair of the next meeting should collect any relevant documents in anticipation of the following session

## 4.6 Virtual Meeting Etiquette: Committee 'Rules of the Road'

Committees should agree on and develop a communications protocol that can be used during virtual meetings. This process is relatively simple and will ease the communication patterns during the session as well as facilitate more timely and effective decision making among the team. Listed below are a few simple suggestions to help guide your Committee when in developing its etiquette for virtual meetings<sup>19</sup>.

- 1) Consider having a rotating Chair and Minute Taker to encourage participation and create an inclusive environment
- 2) The Chair might consider a more formal opening, moderating, periodic summarizing and closing to keep the meeting on track and participants aware of progress and decisions
- 3) Have all team members say hello and give a small update on anything of interest or on what he or she has been doing. This will serve to let everyone know who is present and also help build relationships among the team
- 4) The Chair might then open the meeting by asking for comments and questions dealing with the previous or current meeting
- 5) The Chair should regularly refer to items, page numbers and documents that were previously distributed
- 6) Clearly develop the 'Round Robin' order or list for adding a comment during the meeting – send the list or participants and the rotation order out to everyone before the meeting
- 7) If the meeting is online, participants can:
  - a. Begin each turn with the speaker's name
  - b. Consider using different fonts or colours to identify participantse.g. *Danielle: I have completed the project on...*
- 8) Cue the next participant by finishing questions or comments with "DONE"
- 9) Once cued, the next person on the list can add a comment
- 10) If the participant has nothing to add, say or type "PASS"
- 11) Be precise
- 12) Do not interrupt
- 13) Do not take over the discussion

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<sup>19</sup> Sheridan, B. (2005). *Protocol Rules: Tips for a Successful Virtual Meeting/Classroom*. Retrieved from [www.myschools.com/features/sctn/rtn/virtualmeeting.htm](http://www.myschools.com/features/sctn/rtn/virtualmeeting.htm)

- 14) Keep to the rotation
- 15) When the discussion returns to the facilitator, the Chair has the option to:
  - a. Respond to any unanswered questions that occurred during the discussion round
  - b. Confirm or clarify information on the topic under discussion
  - c. Present a comment or question on the same topic
  - d. Introduce a new question or topic
- 16) All participants should participate in a constructive manner. Discussions should be concise and to the point
- 17) Let everyone participate
- 18) Ask for questions
- 19) Make decisions as a group
- 20) Agree on action items and goals for follow up
- 21) Be sensitive to team members' differing comfort levels with language and technology
- 22) Be professional, courteous and polite
- 23) Review meeting effectiveness at the end of every session for suggested improvements and discussion around what worked, didn't work or could have been done better

## 4.7 At a Glance – The Roles and Responsibilities of All Participants

There are various roles and responsibilities for every person participating in a virtual meeting: the Chair/Leader/Facilitator; the Minute Taker; and, the Team Member/Participant. The following table<sup>20</sup> provides a quick guide to the responsibilities that fall to each role.

Chair/Leader/Facilitator	Minute Taker	Team Member/Participant
<ul style="list-style-type: none"> <li>❖ Schedule the meeting</li> <li>❖ Create the meeting documents</li> <li>❖ Distribute the meeting documents</li> <li>❖ Lead, facilitate and moderate the meeting process</li> <li>❖ Recognize and reward performance</li> <li>❖ Encourage participation</li> <li>❖ Ensure communication protocols are being followed</li> <li>❖ Wrap up the meeting</li> </ul>	<ul style="list-style-type: none"> <li>❖ Actively record the main issues that are being discussed in the meeting</li> <li>❖ Document the               <ul style="list-style-type: none"> <li>▪ WHAT – any new items or goals</li> <li>▪ WHO – which team member is responsible</li> <li>▪ WHEN – the due date of the action item</li> </ul> </li> <li>❖ Document agreed goals, objectives and decisions</li> <li>❖ Repeat and review information during the meeting as required</li> <li>❖ Confirm action items at end of meeting</li> <li>❖ Type up and send meeting minutes out shortly after the end of the session</li> </ul>	<ul style="list-style-type: none"> <li>❖ Be prepared</li> <li>❖ Arrive on time</li> <li>❖ Communicate, Communicate, Communicate</li> <li>❖ Don't blame others</li> <li>❖ Support Group member's ideas</li> <li>❖ Listen actively</li> <li>❖ Participate</li> <li>❖ Get involved</li> <li>❖ Don't take over the meeting</li> <li>❖ Ask for help when needed</li> <li>❖ Ask for clarification as needed</li> <li>❖ Complete assigned tasks</li> </ul>
❖	❖	❖

<sup>20</sup> *Leading a Meeting. Dealing with Your Meeting Notes; and, How to be an Effective Team Member. Retrieved from [www.effectivemeetings.com](http://www.effectivemeetings.com)*

### 4.7.1 How to Create an Agenda, Step by Step

The agenda is an important document that outlines all of the information that will be discussed during a virtual meeting. The agenda is a critical component that contributes to the overall effectiveness and success of any meeting. It is, therefore, important to spend some time on understanding how to create an effective agenda<sup>21</sup>.

#### ***The Agenda:***

- ▶ Communicates important information such as
  - Topics for discussion
  - The presenter or discussion leader for each topic
  - The time allotted for each topic
- ▶ Provides an outline for the meeting
- ▶ Can be used as a checklist to ensure that all information is covered
- ▶ Let's participants know what will be discussed so they can be prepared
- ▶ Provides a focus for the meeting

#### ***How to Create an Effective Agenda:***

1. Send an email stating there will be meeting. Include the date and time, and confirm attendance
2. Ask participants to submit any agenda items requests to you at least 1 week before the meeting. They should include the amount of time needed to discuss the item
3. Once all agenda items have been submitted, summarize them in a table format and include the Presenter and time
4. Make sure all agenda items relate to Committee goals and objectives
5. If an item is better left off the meeting agenda, suggest an alternate method of communication to the team, such as a group e-mail
6. Be realistic in terms of the number of items to be discussed. Do not add too many items to the list
7. Send the agenda to all meeting participants at least 3 days prior to the meeting, along with a reminder of the time, and method of the meeting follow

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<sup>21</sup> *How to create an Agenda, Step by Step. Retrieved from [www.effectivemeetings.com/meetingplanning/agenda/agenda.asp](http://www.effectivemeetings.com/meetingplanning/agenda/agenda.asp)*

## 4.8 Tips for Successful Virtual Meetings

So far, the chapter has focused on a number of different components that are necessary to hold effective and successful virtual meetings. In this final part, a list of practical tips<sup>22</sup>, which effectively summarizing the section, has been compiled to help Committees hold great virtual team meetings.

### Tips for Successful Virtual Committee Meetings:

- Meet regularly (suggest at least quarterly)
- Level the playing field – make everyone virtual
- Make the meeting progress visible
- Determine what is best done in and out of meetings
- When possible, meet in person – AIM
- Take time to build relationships and trust
- Leverage technology – make use of technical tools and budget allotments for conference calls that are available
- Rotate Chair and Minute Taker positions
- Set meeting objectives
- Create an agenda
- Follow a communications protocol – Committee Virtual Meeting ‘Rules of the Road’
- Facilitate for participation – create a ‘Round Robin’ rotation
- Discuss, agree and document decisions, goals and timelines – assign tasks to individuals along with relevant due dates
- Arrive on time
- Be prepared
- Communicate, communicate, communicate
- Actively listen, contribute and get involved in the meeting
- Respect fellow team members
- Be sensitive to different levels of language and technology
- Start and finish the meetings on time
- Follow up on progress of assigned tasks
- Complete tasks and goals according to agreed upon deadlines
- Examine and review your meeting processes for opportunities for continuous improvement

These tips provide a useful checklist for Committees to use to ensure that they are well prepared for conducting successful virtual meetings. Although a lot of information has been discussed in this section, and a lot of practical advice has been suggested, a good place for Committees to start is by committing to holding virtual team meetings on a quarterly basis. Secondly, teams must build trust and relationships by engage in active and frequent communication. This guide should help Committees to work more successfully together – apart.

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<sup>22</sup> Harper, K. (2002). *Virtual Meetings that Work*. Retrieved from [www.kateharper.com/articles/v-meetings-print.html](http://www.kateharper.com/articles/v-meetings-print.html)