BEST Practices for Virtual Meetings

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Special Free Edition 2020 due to COVID-19

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ISBN: 978-0-9878345-7-7

The authours are pioneers of working in the virtual world and enabling the virtual workforce. We are very moved by the worldwide COVID-19 crisis and it's impact on virtually every person.

We offer this special FREE edition to everyone with the hope that the transition to working virtually results in remote workers and virtual teams being able to participate and lead highly effective, productive and engaging Virtual Meetings.

This book was written in 2013 and the authours would like to clarify that some specific technologies discussed in this book are dated. We refer readers to consult sources such as: https://www.capterra.com/meeting-software/ for more up-to-date information.

The core of this book is about the human practise to make Virtual meetings as effective as face-to-face meetings. Some tech needs updating, but the human factors are the most important and they have not changed.

Please visit our website for free pdf copies of this book, or see other resources available to Remote Workers, Virtual Teams & Leaders

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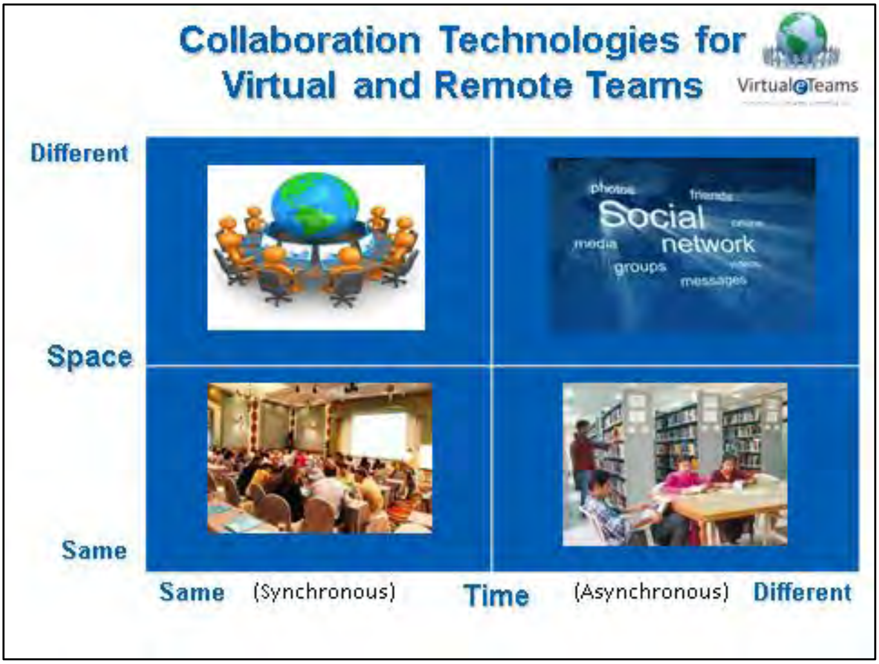
1. Introduction

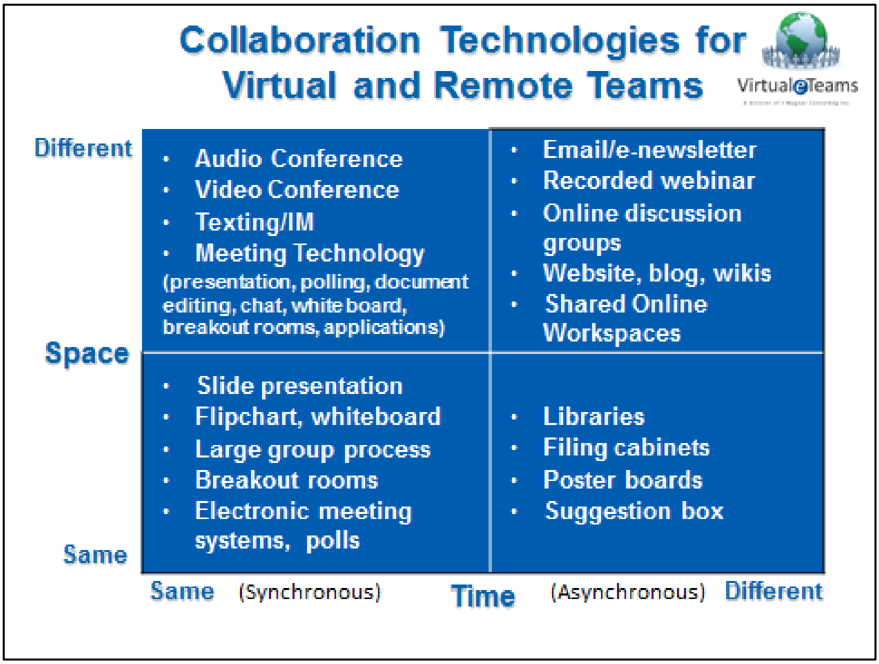
The following best practices are based on research of virtual teams and Virtual Meeting best practices, over 20 years of experience researching virtual and remote team effectiveness, and practical experience leading hundreds of virtual meetings, webinars, workshops and virtual classroom experiences across the globe using numerous platforms.

Effective virtual meetings, like any meeting, require clear meeting goals and agendas; mutually agreed upon roles, responsibilities and expectations; effective meeting processes and facilitation; and development of strong team relationships.

As we consider effective virtual meeting practices and appropriate technology, it is also important to consider virtual meetings in the context of collaboration technologies that enable virtual teams and organizations.

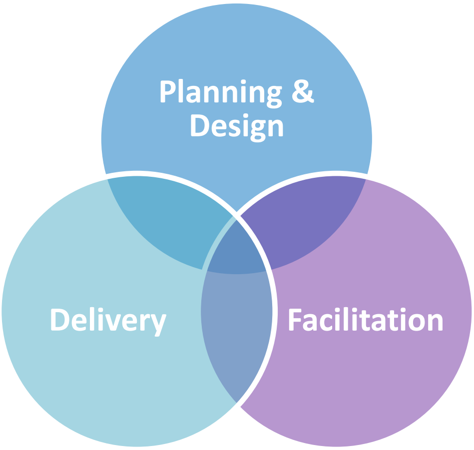


Virtual Meeting technology is only one of the collaboration technologies, and it is important to clearly identify when and why virtual meetings, audio conferences and instant messaging (Same Time, Different Place) should be used when compared to face-to-face meetings (Same Time, Same Place) or when asynchronous communications (Email, websites, shared online workspaces, online discussion groups) should be employed.



While most of the BEST practices included in this book are platform independent, some of the features discussed are only available on certain Virtual Meeting or Virtual Classroom solutions. We have included examples from WebEx, Adobe Connect, Saba and a few other platforms. Several of proposed activities are extracted from our "*Building Effective Virtual and Remote Teams Handbook* (2011)" where they are described in more step-by-step detail.

In this book, we will focus on best practices for the Planning and Design, Delivery and Facilitation of Virtual Meetings.



We will also discuss a number of other collaboration technologies such as the ones illustrated above, and offer recommendations of when they are best to employ (see Chapters 12 and 13 in this book).

Virtual collaboration tools and the virtual meeting has become a basic requirement for corporate and public service organizations. Experienced team leaders and facilitators can achieve the following benefits with Virtual Meeting technologies:

- Avoidance of travel costs
- Convenience
- Increased organizational productivity
- Increased accessibility of meeting documentation
- Interactivity and collaboration
- Ability to generate and share data
- Flexibility
- Integration with virtual learning solutions
- Just in time meeting scheduling, coordination

- Global reach
- Instant recording
- Ease of reporting and analysis

The overall goal of these best practices is to help ensure an effective virtual meeting experience for the participants, ensure the meeting objectives are accomplished and that the meeting is highly effective and achieves the expected benefits as discussed above.

2. Planning Effective Meetings Activity

This section provides some initial insight into some overall best practices for effective team meetings, and describes an activity to help a team plan for and consider the different types of meetings that will be of most value.

Objectives/Outcomes:

- To evaluate effectiveness of face-to-face and virtual team meetings
- To determine the types of meetings that the team needs to be effective
- To develop a team meeting effectiveness improvement plan

Timing:

- Approximately 1 to 2 hours.
- Timing assumes face-to-face sessions, taking longer for larger groups; virtual delivery may be best accomplished by having subgroups work offline and present proposals to the team at a follow-up meeting.

Some overall best practices for effective team meetings

These initial best practices are critical for both face-to-face and virtual meetings. We recommend that teams build these into team operating agreements. Team operating agreements are a critical differentiator for effective virtual teams. (*See "Building Effective Virtual and Remote Teams Handbook (2011)"* for examples and details on how to develop Team Operating Agreements to increase team effectiveness).

1. **Start and end on time**: There is nothing more frustrating than rushing to get to a meeting on time, then having to wait for others to arrive and start late. Late starts do not demonstrate mutual respect for each other and drive poor meeting discipline. Virtual meetings are often

booked back-to-back. Late starts and endings create havoc and ineffective meetings.

2. **Ensure the meeting space and technology is conducive to the meeting goals**: This is important in face-to-face meetings, but even more so for virtual or semi-virtual meetings. Effective use of collaboration technology helps assure participation and engagement. When a few team members call in virtually to a face-to-face meeting, ensure that all speakers and microphones function properly so that everyone can fully engage in the dialogue. Use of web collaboration tools can also allow video and document sharing for all.

3. **Everyone participates and speaks openly – do a virtual round table**: If the real meeting happens after the meeting in the hallways or washroom, what was really accomplished? Without the input of everyone, you don't really have a team. In a cross-cultural environment, it is especially important to pause for reflection and ensure those speaking in their second or third language get a chance to speak up. We recommend that you include in your meeting process to ask attendees in turn for their input as appropriate.

4. **Encourage conflict and debate then move toward closure**: Speak the unspeakable – when there is something unspoken that is pushed to the side or left under the table (like a "dead moose"), it is difficult to make progress.

   - Encourage passionate, unfiltered, messy debate that only ends when the team decides enough has been aired – then once the decision is made, everyone can support it.
   - On the other hand, it is not helpful to have someone continue to bring up the same point over and over (the dead horse). When you "disagree" with others, use the "Law of Three". You have a total of three chances to explain your point so use them thoughtfully and carefully. In the end if you cannot give a compelling case, to others on the team, let it go and move on. The exception to this may be if the decision clearly violates an ethical boundary or agreed to in the

Team Operating Agreements. Hopefully these situations should be addressed explicitly early in the discussion.

5. **Focus on one thing at a time**: If the same issues keep popping up randomly at every meeting and never get resolved, the team becomes ineffective. By focusing on one set of issues at a time the team can better deal with both day-to-day issues and future issues.
6. **Plan the right types of meetings to meet the team's needs**.
   - DeRosa and Lepsinger in their book, *Virtual Team Success* (2010), found that 63% of higher performing virtual teams met virtually at least once per week compared to 29% of the less effective teams. Teams that met virtually each week were rated as the most effective.
   - Patrick Lencioni in his book, *Death by Meeting* (2004), suggests that there really are four types of effective meetings. The authors highly recommend that you purchase this book for all team members. Please find below a brief overview of these types of meetings, which each have a different purpose and structure.
     A. **Daily check-in or huddle** (5 to 15 minutes): This type of meeting can be a telephone based check-in or a brief stand-up meeting to share daily schedules and activities and celebrate successes. These are the types of meeting you never cancel.
     B. **Weekly tactical meetings (45 to 90 minutes):** These are regular meetings focused on tactical issues. The authors have found it helpful to begin with a roundtable discussion inviting each team member to briefly share the top three things or issues happening in their world. Use these to drive part of the agenda. The standing agenda typically includes a review of weekly activities and metrics, discussion to resolve tactical issues and documentation of actions and owners for next steps. Strategic items may be raised, but they are deferred to special planned meetings. A structured template for note taking and showing weekly status helps make these meetings both

effective and efficient and use of web collaboration tools for virtual participants can help significantly. Meeting minutes should focus on decisions and action items.

C. **Bi-Weekly/monthly/ad-hoc strategic meetings (2 to 4 hours or use 90 minute chunks for virtual meetings):** These meetings are generally limited to one or two topics critical to the success of the organization. They usually require research and preparation and are most effective when all participants are engaged in productive conflict and debate, surface disagreement, get it all on the table and result in decisions that everyone supports.

D. **Quarterly off-site "retreats" (1 to 3 days face-to-face):** This is the time to Travel for Trust and get out of the office. The focus is on reviewing strategy, trends, competition, performance, team membership, personnel and improving team effectiveness. A successful quarterly off-site meeting should allow time for reflection and produce renewed goal and role focus, resolution of critical issues, renewed relationships and a clear path forward.

7. **Assess current team meeting effectiveness**: Ask team members to complete the assessment of current team effectiveness. This discussion should focus on the current things that are going well and support team effectiveness and things that are not so well. Consider the best practices in this guide, as well as potentially a review of overall team effectiveness.

   A Team Meeting Effectiveness template is provided on the following page. Team members can be asked to anonymously complete the assessments scale of 1 to 5 (1=strongly disagree, 2=disagree, 3=neutral, 4=agree, 5=strongly agree). Results can be complied for a discussion of strengths, opportunities to develop and preparation of a development plan to improve team meeting effectiveness.

Note: A more comprehensive Virtual Team Effectiveness Assessment is available in the *"Building Effective Virtual and Remote Teams Handbook (2011)."*

Team Meeting Assessment (1=strongly disagree, 2=disagree, 3=neutral, 4=agree, 5=strongly agree)		
1	Face-to-face meetings are effective, accomplish results and are a great use of time.	
2	Virtual/remote meetings are effective, accomplish results and are a great use of time.	
3	We have the right number, frequency and types of meetings (both virtual and remote) to accomplish our goals.	
4	Facilitator, leadership, scribe and timekeeper roles are assigned and work effectively for team meetings.	
5	Team meeting agendas and objectives are clear and effective	
6	Team meeting operating agreements are documented and agreed to.	
7	Team meeting operating agreements are monitored and observed in our meetings.	
8	Virtual meeting technology is used effectively to achieve interaction and collaboration.	
9	What is best about our team meetings?	
10	What most needs to be improved?	

8. **Prepare a Team Development Action Plan**: Once the team has completed an informal or more formal Virtual Team Effectiveness Assessment, identify the top 3 development priorities, and develop an action plan to build the capability. The following Team Development Action Plan template can be used to document your team's plan.

My Team Development Action Plan

Development Priority	Action Items	Who	Timing

9. **Develop Team Meeting Operating Agreements and determine how to hold each other accountable**: Research has shown that one of the critical success factors for Virtual Teams is to develop, document and hold team members accountable to Team Operating Agreements. An excellent reference on creating Team Operating Agreements is available in the *"Building Virtual and Remote Teams Handbook (2011)"*. Similarly, Meeting Operating Agreements can help team meetings be more effective. The following examples of tactical team operating agreements related to meeting management are excerpted from the book.

Tactical Team Operating Agreements for Meeting Management (examples)
• Start and end all meetings on time and "be present" for the entire meeting.
• Identify a facilitator, leader and scribe for each meeting or meeting section, rotate roles.
• Send out an agenda by email 48 hours in advance of every meeting and ensure that minutes are sent out via email 48 hours after every meeting. Rotate taking minutes.
• Respect the agenda. If time needs to be adjusted, gain agreement from the group.
• Rotate time zones for meetings in order to be equitable and fair.
• Agree on standard time zone for publishing meeting times: i.e. EST or GMT.
• In audio or video conferences, keep the mute button on when not speaking.
• Take breaks every 60 or 90 minutes during audio or video conferences.
• Do not interrupt others in meetings.
• Respect the facilitator's attempts to foster participation from all team members.
• Sign on to Web conferences 10 minutes early to ensure the technology is functioning and the meeting can start on time.
• If there are people attending the meeting or audio conference in their non-native language, give them time to think and speak. Provide "reflection time" for people to gather their thoughts.
• At the end of each meeting, evaluate how well we respected our Team Meeting Operating Agreements.
• Identify a technology champion for web conferencing and other technology tools.
• Ensure adequate training and facilitation for technologies to ensure expected productivity gains.
• Develop standard agenda format that includes time, expected outcome (info/decision), owner, etc.

Facilitation steps for this activity:

a. Facilitator asks participants to brainstorm the best and worst team meeting practices. For larger teams this can be done in small groups and then presented and discussed in the larger team.

b. Ask team members to complete the assessment on the previous page using the following scale of 1 to 5 (1=strongly disagree, 2=disagree, 3=neutral, 4=agree, 5=strongly agree), and discuss the results, highlighting the strengths and opportunities to develop.

c. Present or provide additional best practices for effective team meetings, including a discussion about the different types of meetings that effective teams need to plan (refer back to the Assessment question: “We have the right number, frequency and types of meetings (both virtual and remote) to accomplish our goals”.
   - As pre-work, ask the leader and participants to obtain and read a copy of the book, Death by Meeting, by Patrick Lencioni (2004).
   - Provide a brief overview of the best practices for effective meetings, including the key concept of “4 types of meetings” from the Lencioni book (outline material below).
   - The Facilitator should ensure that this activity leverages any work the team has done to prepare and agree on Team Operating Agreements, especially those relating to Meeting Operating Agreements.

d. In groups of 4 to 6, ask the participants to discuss and propose: What different meetings do we need to be effective?

e. Call on each of the groups to propose the types of meetings they believe are required and capture the proposals. Facilitate the discussion towards consensus agreement.

f. In small groups for each type of meeting, ask the team to develop a draft outline of goals, frequency, format (draft agenda) and participants for the type of meeting.
g. Ask each sub-group to present their recommendations to the whole team and then facilitate a discussion to agree on a plan with action items, owners and timing.

Virtual delivery alternative

Tips for conducting this activity remotely:

a. Since this is a strategic issue for the team it would be best to conduct as a face-to–face meeting. If it must be held virtually, it could be broken down into several smaller meetings.
    - Assign pre-reading with copies of the Lencioni book Death by Meeting (2004).
    - Hold an initial meeting to review assessment results and have a discussion of best practices, including an overview of the key notions about meeting types (steps 1. 2. 3.). Conduct a brainstorm session using the chat function and/or using a poll to get preliminary inputs on the types of meetings this team needs and why. Finish by agreeing on next steps.
    - Assign a sub-group to review the recommendations to come up with a proposed draft outline of goals, frequency, format (draft agenda) and participants for the type of meetings. Ask this sub-group to present their proposal at the next virtual meeting and facilitate a discussion to come to consensus.
    - Identify facilitators for meetings to work with the leader to gather input and prepare future meetings.
    - Complete quick poll at end of each meeting to evaluate success.
    - Revisit plan after an appropriate number of cycles.

b. Hold a separate meeting to discuss assessment results and facilitate a round table discussion about what works best about their team's meetings and what needs to improve. Finish the meeting with a priority setting activity using the poll and chat features and entrust someone or a sub-group to summarize the data and come prepared to the next meeting to propose an approach.
c. Hold debriefing sessions at the end of a planned team meeting and evaluate what was best about the meeting and how future meetings could be improved.
d. Invite an experienced virtual meeting facilitator to "observe" a virtual meeting and participate in the debrief session with their observations.

Now that the team has explored the right types of meetings to help them accomplish its business goals and the top strengths and development priorities for team meetings, let us consider the roles.

3. Virtual Meeting Roles

As discussed in the previous section, clear and agreed to roles and responsibilities for Vurtual Meetings will help improve your meeting effectiveness. Some BEST practices are included below:

Best Practices

10. **Document and agree to Roles and Responsibilities for your Virtual Team Meetings**: The key roles in a Virtual Team Meeting are similar to the ones in a face-to-face meeting: Team or Meeting Leader, Meeting Facilitator, Meeting Planner, Timekeeper, Scribe and of course Participants. For larger virtual meetings, it may also be appropriate to have a Meeting Administrator to and perhaps a meeting Host as well. Virtual Meetings will also require Technical Support. Individuals may hold multiple roles, and the responsibilities may be defined differently for each team.

11. **Develop a RACI/RASCI chart to document and agree on Virtual Team Roles**: We have found that an effective way to document and discuss roles is to prepare a RACI chart. This concept has been adapted in many organizations and publications in numerous versions. We have worked with the following definitions of the key dimensions that make up the RACI and RASCI acronyms:

    R = Responsible to create it or make it happen – the doer(s).
    A = Accountable for the result and to approve or veto - the decider.
    C = Consulted for input, expertise and ensure buy-in – keep in the loop.
    S = Support with needed resources (e.g. time, information, people, money) – the helper.
    I = Informed of the outcome – keep in the know.

    The RACI/RASCI chart ensures all stakeholders are clear on their responsibilities and decision-making scope. It helps reduce ambiguity, wasted energy and negative emotional reactions between team members or stakeholders who are dependent on the team's key work outputs. The discussion and dialogue required to reach agreement is just as important as the resulting RACI/RASCI chart. (More detailed instructions on developing RACI's can be found on the web or in our book: *"Building Effective Virtual and Remote Teams Handbook (2011) Activity 8.4"*

    On the following pages, we have prepared a sample RACI chart for virtual meetings that you can edit and use with your team to discuss and agree on the roles and responsibilities you will adopt for your team. We have included the Team Leader, Planner, Facilitator, Scribe, Timekeeper and Participant roles, but you may choose to combine some of the roles into one person's responsibility.

	Sample: Virtual Team Meetings Tasks/Roles RACI (Responsible, Accountable, Consulted, Informed)	Team Leader	Planner	Facilitator	Scribe	Timekeeper	All Participants
1	Ensure the objectives and agenda for the meeting are clear and issued 2 days before the meeting	A	R				
2	Interview stakeholders, clients, partners to represent them	A	R				
3	Solicit input from all participants regarding agenda items and meeting process	A	R	C	I	I	C
4	Determine SMART objectives, agenda, timing, prework for each type of meeting and agenda item	R	A/R	C	I	I	I
5	Design meetings to be interactive and engaging with realistic time frame	R	A/R	R	I	I	I
6	Gain agreement on meeting process and expectations on roles and participation	R		A/R	I	I	I
7	Ensure everyone is clear on objective, agenda and operating agreements			A/R			
8	Prepare and coordinate use of collaboration tools such as white board, chat, polls, annotations, video	R	R	A/R			

	Sample: Virtual Team Meetings Tasks/Roles RACI (Responsible, Accountable, Consulted, Informed)	Team Leader	Planner	Facilitator	Scribe	Timekeeper	All Participants
9	Test to ensure that participants hear each other			A			
10	Ensure participants are engaged in the discussion and everyone has the opportunity to participate			A			
11	Promote and protect the "less popular opinion"	R		A			
12	Document decisions and action items, key discussion points and items for future in minutes template	A			R		
13	Record information accurately and ask for clarification when necessary				A/R		
14	Write and distribute minutes, including appropriate content (white boards, chat, reference material)	A			R		
15	Keep track of meeting progress re agenda and inform everyone when 5 minutes remain on each item	I	I	I	I	A/R	I
16	Solicit input and make adjustments to the agenda when timing needs to change (what to cut? what to do?)	A	R	R	C	C	C
17	Contribute agenda items and provide timely feedback if content or expectations are not feasible						A/R

	Sample: Virtual Team Meetings Tasks/Roles RACI (Responsible, Accountable, Consulted, Informed)	Team Leader	Planner	Facilitator	Scribe	Timekeeper	All Participants
18	Complete all prework and preparation prior to the meeting						A/R
19	Be present & participate fully including use of collaboration tools						A/R
20	Provide content expertise						A/R
21	Take responsibility and be accountable for action items	A		R	I		R
22	Risk posing "less popular opinions"						A/R
23	Participate actively and provide unique perspectives						A/R
24	Hold everyone accountable to follow team operating agreements and appropriately surface the issues	A/R	C	R	I	I	R

12. **Rotate Virtual Team Meeting Roles:** We also recommend that effective teams rotate some of the roles to increase engagement and shared leadership in the team. This is especially true for the scribe and timekeeper roles, but may also apply to planner and facilitator roles.
13. **Reconsider roles required for Virtual Training**: One type of meeting you may choose to consider for your team are training sessions. We have a similar set of roles and responsibilities for training using Virtual Classrooms, especially for more formal and comprehensive training based on Blended Learning. This approach is discussed in more detail in the eBook: *BEST Practices for the Virtual Classroom (2013)*. We have structured that book into the key roles that go into making a

Virtual Classroom experience effective. As illustrated below, the following roles are more targeted to the dynamics of learning and development program, and should also be considered in the broader context of Blended Learning: The Program Developer (or Designer, Architect), Administrator (or Coordinator), Host (or Producer, Moderator), the Presenter (or Facilitator, Instructor, Trainer), a Guest

Speaker, Technical Support person and finally the Participant are critical roles. For smaller programs and organizations, one person will likely play multiple roles.

4. Collaboration Technology for Meetings

Web collaboration tools for meetings and the virtual classroom are readily available. New alternatives and features are introduced on a regular basis at a competitive cost.

Best Practices

14. **Research options for the best Virtual Meeting Technology to meet your needs**: We encourage you to obtain a platform that minimizes software downloads (often restricted by firewalls), allows for video sharing and supports easy to use participant collaboration with such features as:
    a. Voice – teleconference integration, IP phone
    b. Chat – with instructors, specific participants or everyone
    c. Whiteboard – a virtual flipchart – allow sharing small group work
    d. Screen sharing – some allow you to select between multiple monitors
    e. Document sharing – show document or co-edit together
    f. Application sharing – share any application on any participant's PC
    g. Polls – for instant feedback or more complex data collection
    h. Annotations – different ways to participate with text, drawing, etc.
    i. Video sharing – see instructor, other participants, watch videos
    j. Recording – to review what was said or catch a missed session
    k. Hands up, emoticons – for instant feedback or getting attention
    l. Breakout rooms – the ultimate in small group interaction

Type	Collaboration Tool & Costs
Meeting Technology and Web Collaboration Tools **Share Desktop, applications, whiteboard, chat, poll, blackboard**	• Cisco WebEx http://www.webex.com/ (Free for 3 users, $24/month for 8 users, $49/month for 25 users, $89/month for 100 users – Training, Event and Support Center available) • Adobe Connect ($55/month for 25 users) http://www.adobe.com/ca/products/adobeconnect.html • Citrix GoToMeeting http://www.gotomeeting.com/fec ($49/month for 25 users) • Microsoft Live Meeting: http://www.livemeetingplace.com/livemeeting/ ($42/month for 150 users) • Microsoft Skype http://www.skype.com (Free (2 users); $5/month (10) • Huddle http://www.huddle.com • Infinite - http://www.infiniteconferencing.com • ReadyTalk - http://www.readytalk.com/ • AT&T: www.att.com • Alcatel-Lucent: www.alcatel-lucent.com • Dialcom Networks' Spontania: www.dialcom.com • Blackboard Collaborate: http://www.blackboard.com • IBM Sametime: http://www-03.ibm.com/software/products/us/en/ibmsame/ • iLinc Communications: www.ilinc.com • InterCall: www.intercall.com • Saba Collaboration@Work: http://www.saba.com/social-collaboration/ • Nefsis: www.nefsis.com • Yugma Inc.: www.yugma.com • Zoho: www.meeting.zoho.com

There are a number of research papers that review alternatives:

- Business Software Report: Top 10 Web Conferencing Software Vendors: http://www.business-software.com/offer/top-10-web-conferencing-software/
- Free Guide: Virtual Classrooms: http://www.kineo.com/elearning-reports/free-guide-virtual-classrooms.html
- Or contact us at info@virtualeteams.com to discuss your needs - see below a listing of most of the Web Collaboration tools we have researched

15. **Understand the Virtual Meeting functionality**: Take all the possible training available in the features (shared applications, annotating of whiteboards, file sharing, notes management, etc.) and how to use them. Evaluate when each feature can best add to the collaborative meeting experience. Participate in demos and experiment with each feature and facilitator/presenter tools to understand the options.

    The following table illustrates the presenter and facilitator tools available in the WebEx platform. We often demonstrate these tools and features by sharing the PowerPoint slide below in the “My meeting Window”, and then proceed to show each of the features under each column. This quick walk-through and reference slide helps both new and experienced users consider the robust functionality and options that are available to build engagement and collaboration.

    Many vendors offer trial accounts or free accounts (i.e. WebEx offers a free 3 person meeting account, that has many of the basic features). We recommend that moderators and presenters obtain an account for personal use which will help them build the skills to use the system with greater comfort and expertise.

WebEx Presenters/Facilitators Tools

File	Edit	Share	View	Audio	Participant	Meeting	Help	Manage Panels
Save	Undo	My Desktop	Full screen	Audio	Mute	Information	Webex Help	Polling
Transfer	Redo	File	Thumbnails	Test	Mute All	Audio/Video statistics	Verify Player (browser)	Participants
Transfer enable others	Add Page	Application	Zoom in, out, to		Mute on Entry	Start Recording		Chat
Send Transcript	Annotate on	Whiteboard	Fit in Viewer		Invite and Remind	Recording Settings		Recorder
	Clear	Web Content	Auto advance		Assign Privileges	Options		Notes
	Font	Web Browser	Synch All		Change Role	Restrict Access		PowerPoint Notes
	Preferences	My meeting window	Panels					

Most Virtual Meeting vendors have comprehensive job aides, templates, user and participant guides and training available which provide novice, intermediate and advanced users with an understanding of the specific functionality and capability of the Virtual Meeting environment. Find out all the specific tools available and take the training to build your expertise.

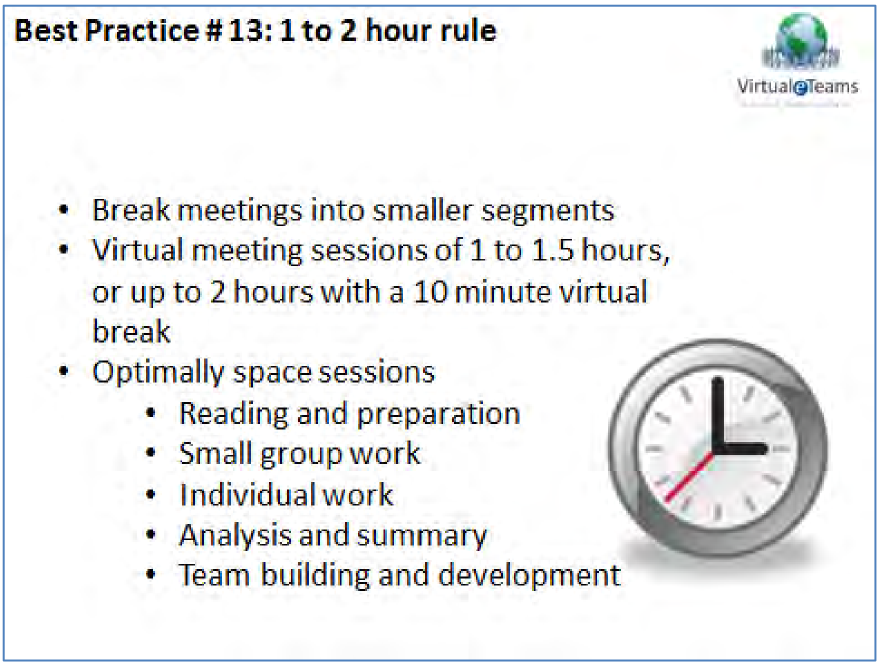
Finally, practice, practice, practice.

5. Planning: Meeting Agendas and Notes

The meeting planner and/or leader are responsible to solicit input from meeting participants and prepare a meaningful agenda that can be realistically accomplished in the allotted time. At the same time as creating the agenda, the end result needs to be considered, and a framework for note taking and documentation

Best Practices

16. **1 to 2 hour rule**: One of the overriding principles in the Virtual Meeting environment is to contain meetings where possible to be 1 to 1.5 hours long with 2 hours being a maximum.



While face-to-face meetings may several days in length, virtual meetings are most effective when broken into smaller parts. The overall design for more strategic and developmental meeting can consider use of prework, small group work in separate virtual meetings, individual work, analysis and summary of material and even team building activities and development sessions.

17. **Develop a standard agenda building process**: A team that regularly meets virtually should not only discuss the types of meetings they hold, but also discuss and agree on a standard process of who, how and when agendas will be developed and communicated. They may require different process for different types of meetings such as Weekly Tactical Meetings as compared to Strategic Meetings and Developmental Retreats. The following example documents a process a Virtual Team might use for Weekly Tactical Meetings
    - Meeting leader communicate and request agenda items – 1 week prior to meeting (at previous weekly tactical meeting)
    - Summarize Agenda Items
        - Ensure each item is directly related to meeting goals
        - Communicate with individuals as needed
        - Be realistic in the amount of time you allocated
    - Post reference documents and presentation material on a designated, easily accessible shared work space
    - Send detailed agenda out 2 days before meeting
        - Reminder of the meeting details.
        - Confirm details with agenda item owners
    - Follow agenda during meeting
    - Distribute meeting minutes and recording link within 24 hours after the meeting
18. **Develop standard meeting agenda and notes taking templates**: In addition to agreeing to a process for Agenda building, it is also valuable to discuss and agree on a template for the meeting structure, the agenda and even the framework for note taking. Below are some sample templates used by different virtual teams for various types of meetings:

Weekly Tactical Meeting Structure

Date: ______________________

A. Lightening Round Notes

B. Key Metrics Review

Goal/Metric

1. ______________________
2. ______________________
3. ______________________
4. ______________________
5. ______________________

C. Tactical Agenda Items

Order	Topic
____	______________________
____	______________________
____	______________________
____	______________________
____	______________________
____	______________________
____	______________________

D. Potential Strategic Topics

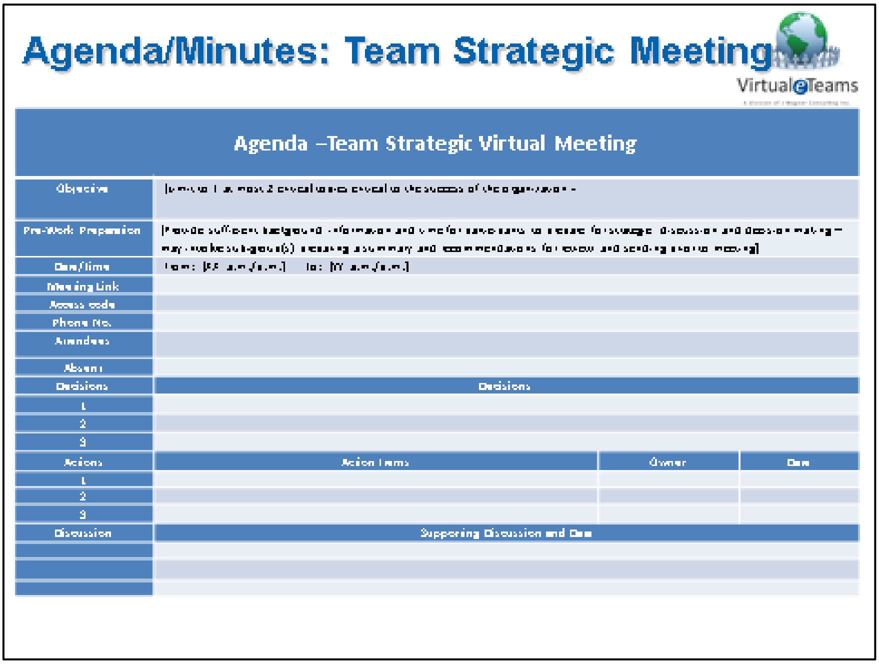
Topic

____
____
____
____
____
____
____

E. Decisions/Actions

F. Cascading Messages


Agenda/Minutes: Team Meeting
VirtualeTeams
Agenda – Team Virtual Meeting


Agenda/Minutes: Team Strategic Meeting
VirtualeTeams
Agenda –Team Strategic Virtual Meeting

6. Planning: Meeting and Presentation Design

Planning any meeting is an art. There is a lot at stake for the team and organization. As the humorist Dave Barry wrote: "If you had to identify, in one word, the reason why the human race has not achieved, and never will achieve, its full potential, that word would be 'meetings'. The following are Best practices for Virtual Meeting Design.

Best Practices

19. **5-10 minute rule:** The Virtual Meeting environment is most effective when the degree of interaction is very high among those in the meeting. A best practice is to ensure you create activities that require participants to engage actively with other participants or the meeting facilitator every 5–10 minutes. In his book *Brain Rules,* Dr. John Medina, a neuroscientist, recommends what he called the 10 minute rule. In a typical 1 hour session his research showed that attention drops off dramatically after 10 minutes, and that it briefly recovers near the end of the session (perhaps because people know it is about to end and a Q&A or summary has started).

    In her book *Better Beginnings*, Dr. Carmen Taran proposes that if you can do something to "create anticipation" in the first 30 seconds, it buys you 10 more minutes of "attention", after which you need to create anticipation all over again. The implication is that to keep participants engaged, introduce activities that require everyone to interact every 5–10 minutes.

    The types of interaction can be similar to the types of interaction you build into effective face-to-face meetings, but they can also be quite different. Annotation tools can be used very creatively, allow everyone to provide input, and the data is documented for future reference.

20. **Engage participants before the Virtual Meeting**: Engage the meeting participants before the meeting begins. To communicate the agenda, background information, use pre-reading or scheduled orientation sessions to prepare meeting participants.

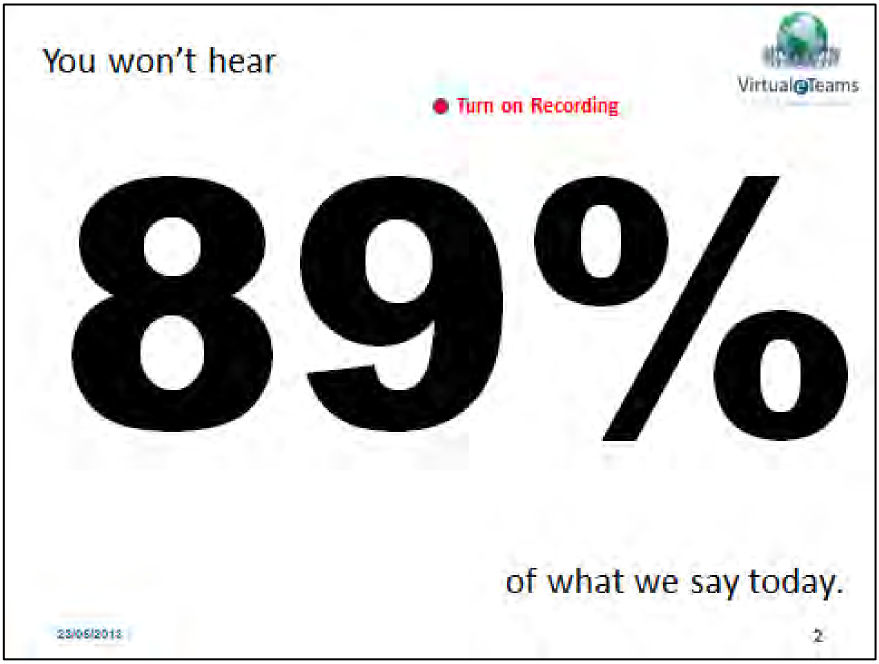
21. **Orientation Sessions**: An important best practice for inexperienced users, especially when there are any questions or concerns about all participants having access to adequate equipment or technology, is to develop an orientation session to build capability in using the technology. The material for this session can include screen shots of what the participant will see and how to use a few initial tools (such as audio check, enable video cam sharing, and mute microphone) to fully participate in the workshop. These sessions should be short and focused on ensuring everyone can connect to the meeting and on resolving any technical issues. They can also be used to remind participants of any other pre-work and give them time to get any technology issues fixed (i.e. get a better headset with microphone).

22. **Online Surveys**: To establish the level of knowledge and expertise as well as important insights into what is driving attendees to participate, use polls, assessments and online surveys before the formal meeting begins, during the meeting and afterwards to collect data for summary, discussion and meeting evaluation. Explore the powerful inexpensive (often free) survey technologies available on the Internet (e.g. www.surveymonkey.com).

23. **Virtual Meeting "Coffee Breaks":** Include a 5 to 10 minute break in mid-session if the meeting is more than 1 hour. Interact with everyone right after the session to recapture their attention and to know who is back from break (for example: have a quick chat or hands up activity). Longer breaks are required if the meeting is even longer, but if may be better to change venues to small group work or other activity such as reading and preparation for the next segment.

24. **Countdown Timer:** Include a countdown timer for presenters to use for breaks so participants can see how soon the break will be over. One example is to use the "share browser" and use the stopwatch timer located at: http://www.online-stopwatch.com/countdown/.

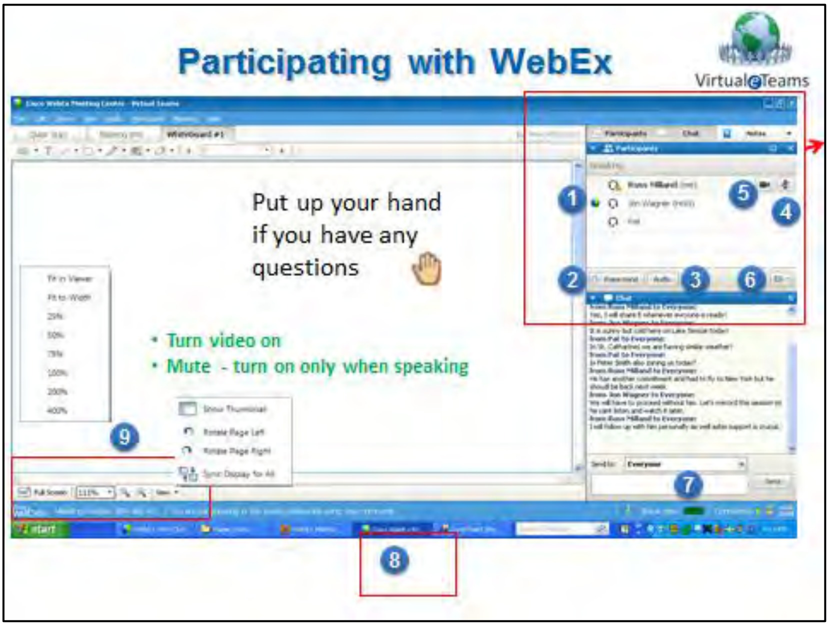
25. **Open with a "bang":** At the beginning of the session, use controversial session openings to catch participant's attention. There are numerous creative ways to accomplish this. One example is to fill the screen with the number "89%", then explain, you will likely not hear 89% of what I am going to say today. Go on the elaborate why this is so, how you are going to reinforce the 11% that you want people to retain from what you say. Following this, proceed to develop your material to reinforce the message.



26. **Presenter's pictures and background**: Develop an introductory slide to introduce the Meeting Leader, Facilitator/Producer and Presenter (and others) by showing their photographs. Images of the key participants which illustrate a memorable aspect of the presenter can help build relationship and trust. For international audiences it may be

useful to show a map or picture of where the presenters are located, especially if they are in different locations.

27. **Introduce the Virtual Meeting Environment and how to participate**: At the orientation session and in each subsequent session, it will be important to introduce features in the Virtual Meeting platform, demonstrate them, and give participants time to practice them. It is a best practice to introduce key tools progressively in the virtual meetings, just prior to participants needing to use the feature. This needs to be incorporated into the instructions for the host and presenters and into the agenda timing of the sessions. Special slides with screenshots can be developed to help the presenter to show these features to the participants. These features could include the following, but vary by platform and may need to be enabled by the presenter for participants to be able to use them:



a. List of participants - and what any symbols next to participants name mean (like a headset, video and microphone symbol)
b. Raise Hand – how to raise and lower hand
c. Audio – how to test and adjust microphones and speakers
d. Microphone – how to mute and unmute the microphone
e. Video – how to turn on and off video and how to view video cams of other participants
f. Chat – how to use chat privately and publicly
g. Notes – how to record notes
h. View Adjustments – for zoom-in and zoom out and full screen adjustments
i. Annotation tools/Emoticons – how to use each tools: i.e.: text tool, drawing tools, changing colour, changing text size, erase, etc.
j. Whiteboards – how to create new white boards

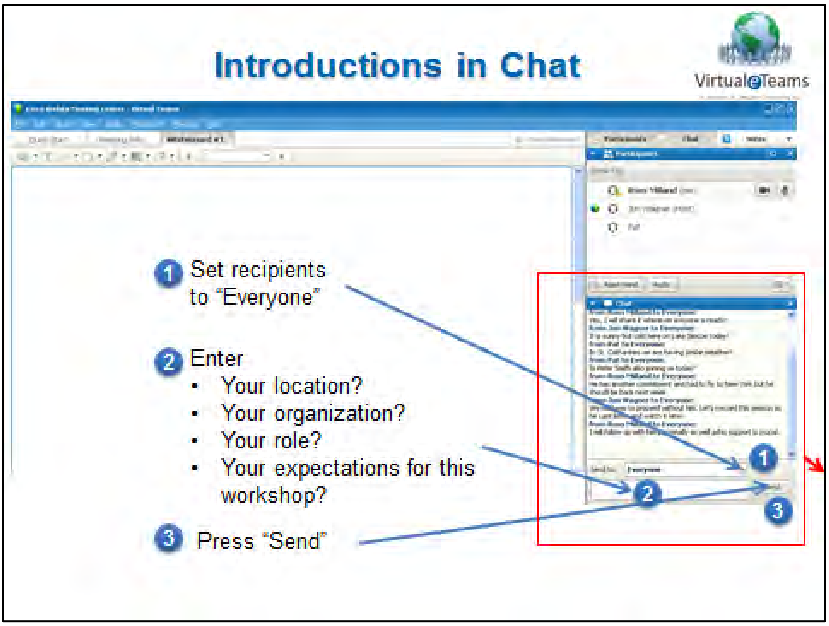
k. Full Screen – how to switch between full screen and platform view and still see chat, participant lists, etc.

l. Download files - how to download presentations, resource materials, chat

m. Transfer files, share applications, share website, etc. – if participants are given "permission" to use these features, then include it in the design along with presenter notes with instructions how to use them

n. Recordings – How to turn recording on and off and access them afterwards

28. **Participant Introductions**: For one-way webinars, participant introductions are often skipped. For a collaborative Virtual Meeting where some or all of the participants are new to each other, the following best practices may be considered, and illustrated with screenshots to teach how to use chat at the same time:



a. Initial introductions can be accomplished quickly by asking participants to answer a few questions about themselves in chat and/or using the video/audio features. Basic questions might include name, location, and role. This can used as a teaching moment on how to use chat and video features.
b. If possible, more detailed introductions may be best done during a face-to-face meeting, where you can use more creative and lengthy introductions to build trust and community.
c. If this is part of a series of collaborative meetings you may also include a few questions about expectations for the team meetings or about something memorable about themselves or you may do more detailed introductions in small breakout sessions.

29. **Introductions on Social Networking**: An innovative approach to building virtual relations and connections is to use social networking tools. For example, prior to the session: Ask participants to update or complete their profile on LinkedIn (www.LinkedIn.com), or other similar business oriented social networking site, or an internal network (Note: for companies restricting access to public social networking sites, private platforms are available at www.yammer.com, www.chatter.com, www.salesforce.com and www.yourmembership.com, etc.). Many team members may already have their profile on LinkedIn and may see this as an opportunity to reassess if they are presenting themselves in the way they want to. Team members should be encouraged to include an up-to-date photo and details for specific categories on LinkedIn (see "*The Building Effective Virtual and Remote Teams Handbook (2011)* - Activity 3.2 for detailed instructions).

30. **Brainstorming in Chat**: Incorporate brainstorming into the Virtual Meeting sessions using the chat facility to collect brainstormed ideas from the participants. Before asking learners to post their answers in chat, the Facilitator should post the question in chat to precede the

thread of answers. Save the chat log and process and print it later as part of the documented results of the session.

31. **Variety and Sequence**: If possible, carefully sequence the activities in a Virtual Meeting session with a logical sequence of presentation, individual tasks, large group discussions and small group tasks in order to keep all participants engaged and attentive.

32. **Shared Applications**: Incorporate the “shared applications” features to allow all participants to view documents or virtually any application that can be loaded on the host’s or presenter’s PC. This can be used for demonstrations, sharing information or even allowing participants to edit the document one at a time in familiar document formats such as Word, PowerPoint and Excel.

33. **Shared “My Meeting Window”**: This feature can allow the presenter to show their desktop to explain what they see. This is especially useful in training people to be presenters or facilitators of their own virtual meetings and project meetings.

34. **Share Web Content**: This feature will allow the presenter to pull up the same web browser on each participant’s PC. Participants can then be given instructions to independently explore the website, do some research, and report back to the group.

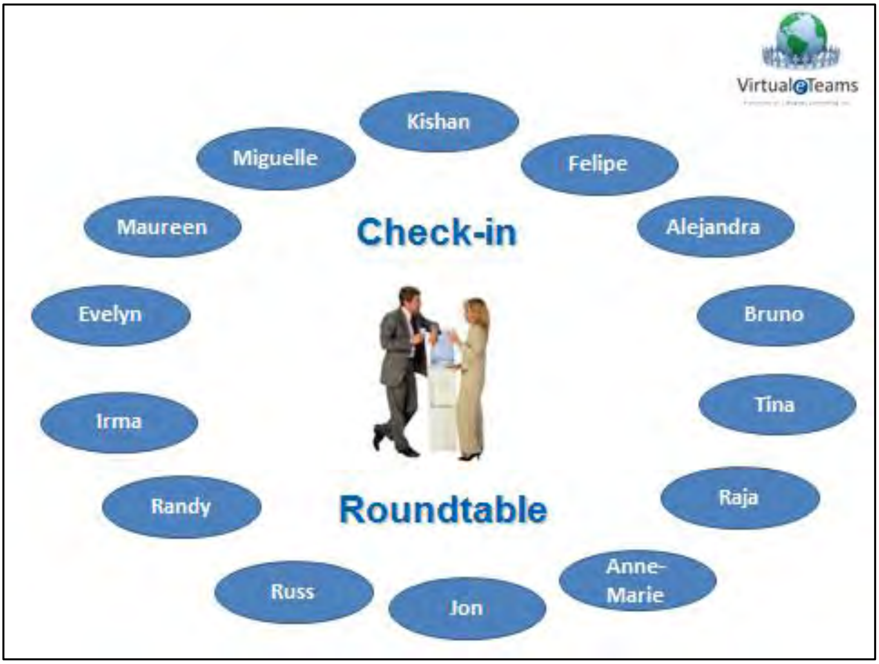
35. **Share Whiteboards**: Use the concept of a flipchart model from the traditional face-to-face meeting approach. Build templates in advance to embed into multiple online whiteboards and even inside presentations and shared documents to guide discussion and to capture information. Prepare bullets in lists, preset font sizes and the structure of the information.

36. **Q&A Raised Hands:** Whenever you are entertaining answers to a question using audio responses, insert a Q&A slide to anchor the fact that you are entertaining questions at that point. Use an illustration of a raised hand on the slide. Ask participants to electronically raise

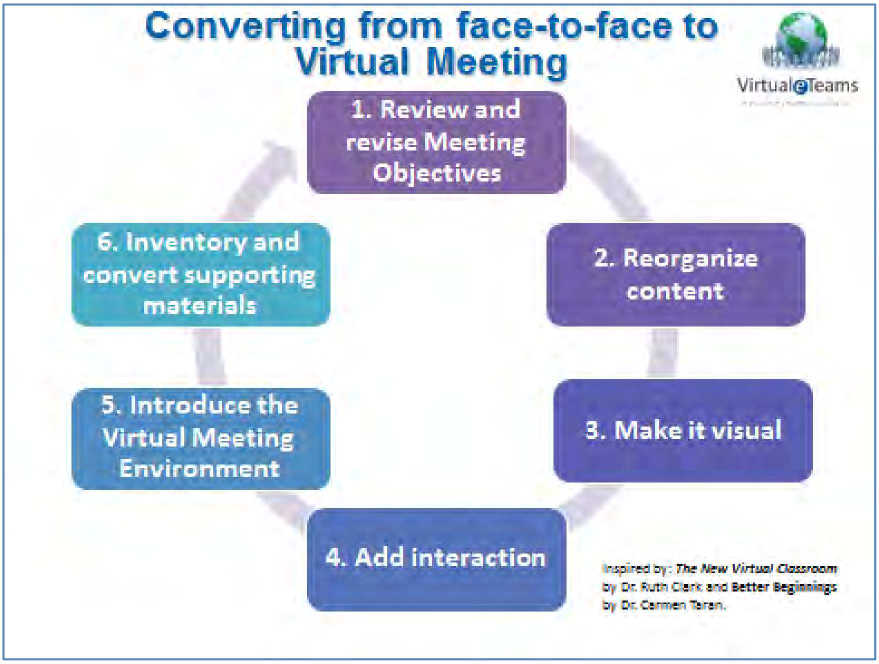
their hands when they are ready with a question, or even when the have a comment or an answer.

37. **Q&A Chat:** It can be helpful to write out questions clearly in words on a slide so participants can consider what you are asking. Use a "Chat" icon with an arrow to the lower right of the slide when you expect the answer to be typed into the chat function.

38. **Watercooler Chat or Check-in**: In online sessions it can be useful to use a slide with the names (and even faces) around an image of a water cooler. Call on each participant at the beginning of a session or in response to a deep thought question when you would like to hear each person's response. This approach is also useful near the end of a virtual meeting to ask for comments or feedback about the session.



39. **Convert complex facilitation from face-to-face to Virtual Classroom**: The following process was inspired by some of the recommendations from *The New Virtual Classroom* by Dr. Ruth Clark (see reference # 23 in Chapter 9) and *Better Beginnings* by Dr. Carmen Taran (see reference # 17 in Chapter 9) We highly recommend those books for more ideas.



a. **Review and Revise Meeting Objectives**: Determine any needed revisions to the meeting objectives, and then determine which can be best accomplished and tested in a Virtual Meeting environment and which lend themselves to other media such as pre-reading , individual work and small group work.

b. **Reorganize content**: Re-distribute content to alternative media, allocating only the most appropriate Virtual Meeting content into interactive sessions of 1-2 hours each. Break activities into smaller steps and consider small group in mini Virtual Meetings between session and report back to other participants in the larger session .

c. **Make it visual:** Inventory and re-purpose existing visuals. Adjust visuals to Virtual Classroom functionality (video format, size, etc.), Simplify complex visuals, add more visuals and look for opportunities to make visuals interactive.

d. **Add interaction:** Inventory and re-purpose existing interactions. Incorporate ad hoc interactions that typically occur in the class. Convert long open-ended activities or tasks into short interactions. Move some activities to asynchronous modes and add frequent relevant interactions ensuring variety and inclusiveness. Use polls and chat to collect information or data and be prepared to share it for further comment. Use whiteboards or shared applications to capture ideas and information

e. **Introduce the Virtual Meeting Environment**: Begin with existing introduction then re-work the introduction to ensure that you build social presence and interaction. Introduce learners to understand and work within the new virtual meeting environment.

f. **Inventory and convert supporting materials**: Review materials to ensure "fit" with new structure. Simplify handouts. Build checklists. Review and revise communications, facilitators and leaders materials and participant materials. Make undocumented interactions explicit. Incorporate virtual facilitation best practices. Ensure instructor direction is included on the screen in an instructor-only view with simple easy references.

40. **Converting to the Virtual Classroom – Types of Interactive Activities**: In our experience, there are many types of Classroom Activities that convert well to the Virtual Classroom with great results. Here is a list of some of our favourites:

a. Icebreakers:
- Use a poll and share results
- Share a whiteboard, maze, word search and provide annotation tools to participate

- Facilitate a "meet and greet" using chat
- Facilitate a "watercooler" chat (draw circle with names)
- Launch a test – use chat to collect initial reaction

b. Lecture

- Live demos
- Guest speaker, subject matter expert
- PowerPoint
- Video
- Websites
- Applications
- Annotation with drawing tools
- Record for participants who not able to attend

c. Discussions

- Verbal (unmute participants)
- Chat
- Raise Hands
- "Watercooler" – draw circle with names (take turns)
- Enable video – see faces of speakers
- Text tools – give each person white board or section
- Breakout rooms – small group discussion (white board)
- Interview an expert

d. Guided practice

- Worksheets (added to materials)
- Give keyboard and mouse control to a learner
- Pass desktop sharing to a participant
- Scripted role plays
- Encourage guidance/participation from other learners verbally or through chat

e. Skill application

- Exercises (added to materials)
- Chat

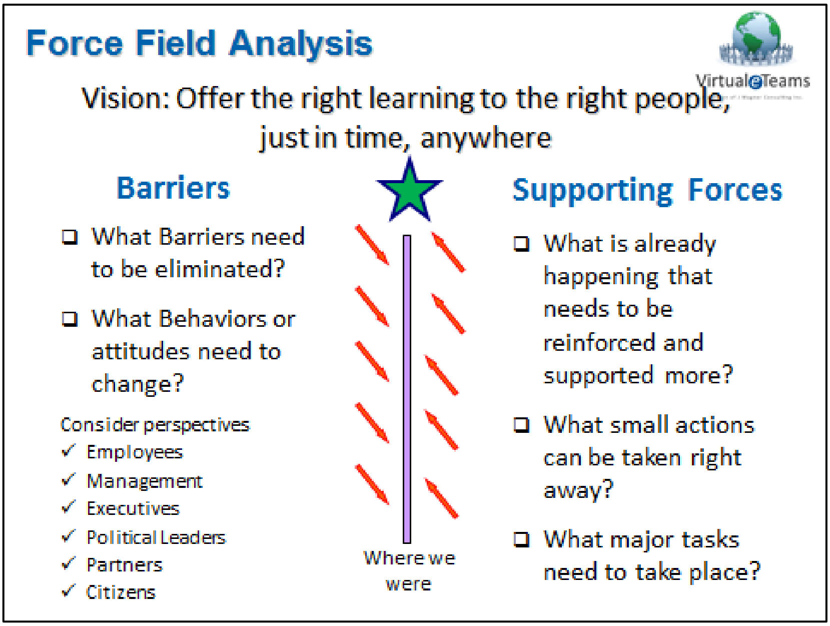
- Timer
- Tests
- Multiple sessions with assignments/group work in between

f. Interaction
   - Handraising with verbal (unmute attendees)
   - Polls
   - Chat
   - Matrix – ask participants to type in boxes
   - Work in pairs on whiteboard – to develop joint response
   - Give keyboard and mouse control to a learner
   - Pass desktop sharing to a learner
   - Share web site and have participants research /report back
   - Audio role plays
   - Prioritization activities using poll, check marks

g. Testing
   - Polls (quizzing)
   - Tests (before, during, after) with or without timer
   - Question and answer through chat and unmuting attendees

h. Certification
   - Pre- and post-tests
   - Attendee report and analytics
   - Test report

41. **Convert complex facilitation from face-to-face to Virtual Classroom (example):** A powerful approach in Virtual Meetings is to facilitate a discussion using an intervention such as Force Field Analysis (Lewin). This approach can be used to help teams build plans around resolving



challenging issues (i.e. lack of collaboration across different organizations). For example (see “*Building Effective Virtual and Remote Teams Handbook (2011)” - Activity 4.2* for detailed instructions):

i. The first step is to create a vision of what it would look like if the issue were resolved, discussing the current reality, and then identifying barriers and supporting forces.

j. The next step would be to multi vote on the most important barriers and supporting forces and, once prioritized, build action plans to remove barriers and enhance supporting forces.

k. This process is effective in a face-to-face session; however it could be conducted at least in part using a Virtual Classroom. The visioning process or desired future state could be completed at a previous face-to-face session for the most complex of problems, or it could be done with an open discussion on an electronic whiteboard for a more focused problem or issue.

l. The discussion could be broken out into several different meetings. The first session could focus on desired state. It may be appropriate to leave some time to review before finalizing.

m. Worksheets could be sent out in advance of the second session, asking each person to think about the top three or four barriers or supporting forces and be prepared to discuss.

n. Barriers and supporting forces could be discussed and captured on an online worksheet that everyone can see.

o. Multi-voting could be done either offline by sending results to a facilitator to tabulate results for the next meeting, or by using an online spreadsheet

p. In the online facilitation example below you can see an illustration of this process as it was used with a group that was brainstorming the barriers and supporting forces related to a Greening initiative. As the group brainstormed, the items were captured in a Microsoft Excel spreadsheet for everyone to see. Once the brainstorming process was brought to a close, participants were asked to "vote" for the barriers or supporting forces that were most critical to address with action plans. Each participant was given three "2 point" votes and three "1 point" votes. As these were tabulated, the excel spreadsheet instantly showed the highest priorities for action planning.

This type of activity requires a very experienced facilitator who can quickly capture the information in a prepared spreadsheet for real-time data capturing.

Online Facilitation: Force Field Analysis

Greening in Organization XXX

Barriers	Rajid	Bill	Jon	Kate	Laura	J.P.	Neera	Total
No clear sponsorship for a Greening strategy								0
- Sponsors have not agreed to their Greening role/accountabilities		1		2			2	5
- Need/Business Case for Greening strategy not understood – getting much clearer					2			2
No articulated high level organization wide strategy/framework for Greening	1							1
- Initial framework developed but not updated								0
- Implementation plan has not been defined							1	1
Lack of budget for greening initiatives			2					2
Resistance by managers to telecommuting	2		1		2	1		6
Lack of telecommuting policies		2			1	2	1	6
Lack of training/education in Leading Virtual Teams for managers & team leaders	2	1		1	1		2	7
Lack of training/education in Effective Virtual Meetings	1	1		2		1	1	6
Lack of agreed to roles & responsibilities								0
- Not expressed in terms of specific accountabilities								0
- No clear WIIFM (What's in it for me) – need to get buy-in				1				1
Lack of approved and communicated targets								0
Not included in Performance Management Objectives	1		2			2		5
Employees don't care								0
Managers don't care								0
Lack of belief in Global warming								0

Supporting Forces	Rajid	Bill	Jon	Kate	Laura	J.P.	Neera	Total
Opportunity to combine Greening strategies with cost reductions			1					1
Availability of Web Collaboration tools for workshops								0
Best practice in Finance - Recycling Project			2	2		1		5
Best practice in Telecommuting Project - Recycling Project								0
"Leading Virtual Teams" course available from VirtualeTeams	2	2			2			6
"Building Effective Virtual and Remote Teams Handbook" available from VirtualeTeams		2		1	1			4
"Effective Virtual Meetings" course available from VirtualeTeams			1			2	2	5
Business case documentation available				1				1

42. **Share Videos**: Design video segments specifically to be shown as part of a Virtual Meeting experience, but the technology and bandwidth issues may make this impossible to do effectively. Here are a few ways you can do this, but test it before incorporating it into your program. We would recommend testing it in the worst case scenario of connections with different methods to determine what will work best:

    a. **Share File**: Load Video as a video file using the "share file" function, which will load to a separate tab. This file can be played at the appropriate time during the Virtual Class., However if bandwidth is insufficient, the video will buffer and take a long time to load which will cause delays in the playback.

b. **Share Web Content:** It is also possible to share web content which will also load a new tab with a video streaming link which can be played at the appropriate time during the Virtual class. There are many YouTube videos (such as TED talks – see www.ted.com) that might be used, but this could be a problem if a participant's company does not allow YouTube on its internal network. The problems of buffering and bandwidth may also be a problem. The advantage is that the video plays on each person's PC, so those with better bandwidth may view it perfectly, while others may have delays or not see it at all.

c. **Share Web Browser**: This allows the presenter to share a website and click on the "play" button for a video stream. The experience is similar to the above, but the video plays on the presenter's computer rather than on each participant's PC.

d. **Load Content on Internal Server**: If all attendees are in the same organization an internal server may be used to stream the video which greatly increases the probability of success.

e. **Transfer File**: Another approach is to transfer the video file in a universal format (such as a .wmv or .mp4 format). Participants can be asked to download the file to a location on their PC for playing later in the session as it can take time to download. One idea would be to ask people to download the file just before a break and then the file could be ready to play during the break. It is possible that participants could have difficulty finding and playing the video file.

f. **Transfer file or provide a Web Address for Playing between sessions**: If you have bandwidth concerns, this may be the best solution. Provide participants with a downloaded file or link and ask participants to view it between sessions as intersession work. You may give them a question to think about as they view the video.

43. **Small Group work**: In Virtual Meetings, you can also establish small groups who present back to the larger group to allow for enhanced collaboration between participants. These can be designed into the program as:

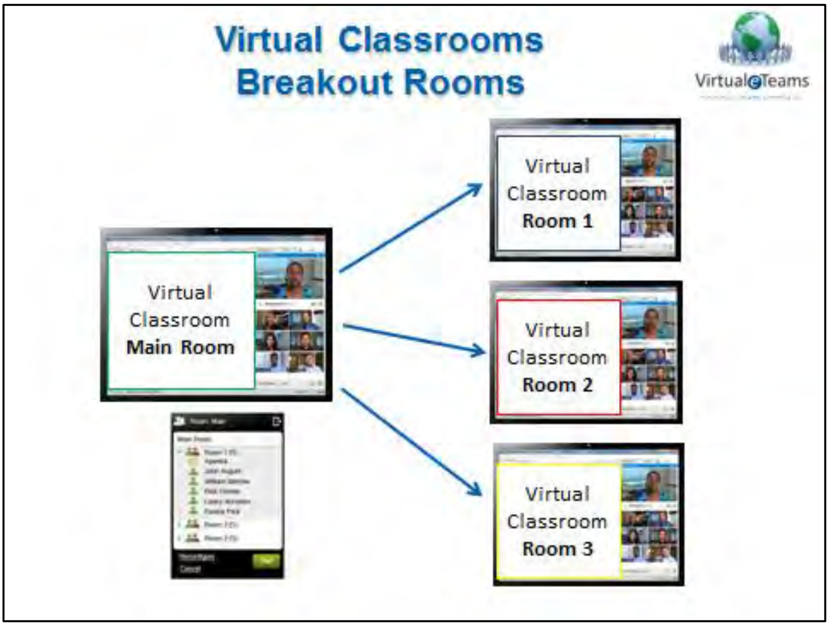
   a. Small group teleconferences, video conferences or even full web conference session between formal classroom sessions (Note: WebEx offers a free account which allows hosting of virtual collaboration sessions with up to three participants).

   b. Sub-sessions within the Virtual Meeting environment using the online breakout room function (e.g. WebEx Training Centre, Adobe Connect Pro, and Blackboard Collaborate).

   c. Multiple online whiteboards with separate Skype audio teleconferences set up for each group for audio participation.

44. **Breakout Rooms**: Incorporate the use of Breakout Rooms which allow a group of participants to go into a separate virtual room to work collaboratively for a set period of time. In Breakout Rooms,

participants have the same features and functionality as the main meeting room, including audio conferencing, sharing content, white boards etc. You can use Breakout Groups for interactive labs, collaborative brainstorming sessions or team activities.



The leader or facilitator can visit each breakout room to monitor the small group progress and provide insight, ask or respond to questions, or just observe how things are going. It is important to provide instructions for participants on how to contact the instructor if they need to interact with the presenter.

At the end of the small group breakout session, small groups can present back to the larger group to share their output on a white board or shared document.

45. **Team/Workshop Operating Agreements**: Include a learning team operating agreement exercise, especially for ongoing longer series of meetings to establish how everyone involved will work together. This is especially valuable for team meetings where the team will be

working together between meetings. Review the agreement with each group meeting to track how well they are doing against the agreement. Detailed facilitation instructions are available in the *"Building Effective Virtual and Remote Teams Handbook (2011)" - Activity 6.1*.

46. **Maximum number of Participants**: How many participants are just right?

    a. **Webinars/eCoffeetalk**: these can be as large as the platform allows, especially if interaction is limited to polls and Q&A. You can even do large polls and brainstorming in chat with hundreds of people, but the level of discussion is very limited. They are most useful to use with senior organizational or functional leaders or with special guest experts who have a need to address a broad organizational strategy or issue.

    b. **Interactive Meetings** A rule of thumb we use for interactive Virtual Meetings is to consider the maximum number of participants you would have to ensure a high degree of interaction in a face-to-face situation. For example, if you determine that the maximum of 16 or 24 participants are in a face-to-face session, then reduce that number by 25% (i.e. 12 or 18) to account for the challenges of maintaining the high degree of interaction and the complexity of the media. With a great deal of experience, you may be able to work back up to the same number as in face-to-face meeting experiences with the right technology and highly skilled designers and facilitators.

47. **Animations and Transitions**: Include animation to convey progress using the "slide build" or "slide reveal" capability to provide some movement and to have the slide grow in complexity. Do not use slide transitions as they are bandwidth intensive.

48. **Games**: It may also be helpful to include simple games which can help engage the meeting participants to augment the meeting experience.

They are particularly useful as beginning of longer meetings and after breaks to help break the ice and facilitate team building. Test the games thoroughly before use.

49. **Effective PowerPoint Slide design**: PowerPoint slides are a primary tool for communicating information. Keep presentation slides as simple as possible.
    a. Use large font (32, 28 or even 20) and keep the number of words to a minimum, providing supporting speaker notes in a facilitator's guide.
    b. Break up the slide into a sequence of slides wherever possible.
    c. Minimize points and text to a maximum of 5 points in a list and 5 words per point.
    d. Use graphics and images **t**o appeal to the emotional "right side" of the brain
    e. Develop strong visual appeal with very engaging slides and images, rather than words to make the point in lieu of text. Consider one point per slide.
    f. Rely on your verbal presentation and other resource documents to provide the detailed information for their future reference.
    g. Do not use full screen images in the interest of minimizing bandwidth requirements.
    h. Do use the "Smart Art" feature in the most recent versions of PowerPoint to convert your list of bullet points to a much more attractive list with great visual appeal.
    i. Add small meaningful graphics where appropriate to your slide.
    j. Use single colour backgrounds and avoid add any patterns or logos.
    k. Use line drawings in lieu of pictures where appropriate for more visual appeal.
    l. Design slides to be absorbed from a few feet away and not from across an auditorium.

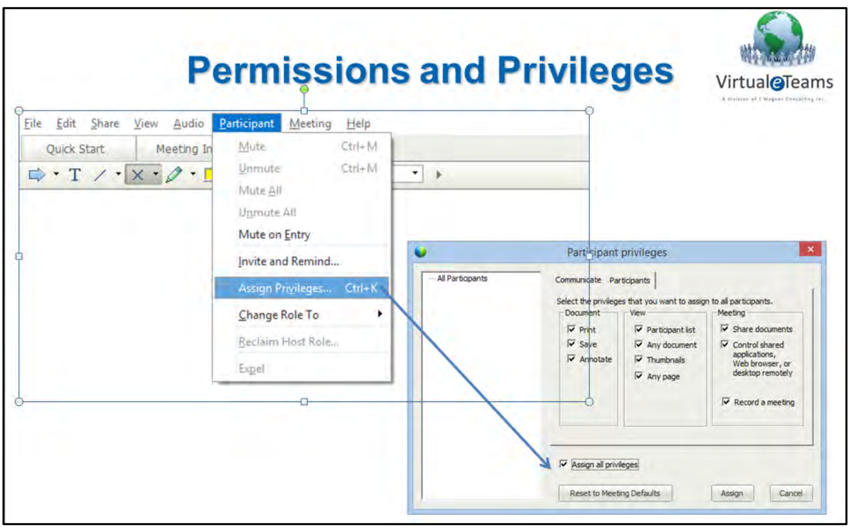
50. **PowerPoint Notes**: Use the notes section for each slide to provide an outline of the script for that slide:
    a. Avoid too much information here too, unless it is for reference notes for the participants afterward
    b. When preparing notes start each line with a period and then use spaces to indent the text the right amount
51. **The Secret Formula for Online Presentations that Engage**: This is another great resource sponsored by GotoMeeting and developed by Gihan Perera. It can be downloaded at the following website and provides many more PowerPoint ideas: http://learn.gototraining.com/G2T-WP-Secret-Formula-L1?ID=70150000000YFSW&elq=01269e1d22be4d97a0e8bb671388d7ad&elqCampaignId=
52. **Screen Capture Tools**: Use screen capture software (such as SnagIt: http://www.softwarecasa.com/) to capture all or part of computer screens displaying information appropriate to the meeting agenda.
53. **Slide shows**: Develop slide shows and turn them into videos with narration using video editing tools (like Camtasia - http://www.softwarecasa.com/) and post on Slide Share (www.slideshare.com) for easy sharing.
54. **End of Session**: At the end of the session, summarize the session at the end and cover next steps and options. Include a Question and Answer page to anchor a discussion with the participants using the "raise your hand" feature to control the process. The Facilitator or Scribe should capture the questions and answers in point form by annotating the Question and Answer slide or on a Whiteboard.
55. **Checklists**: Work with the Administrator to develop checklists tailored to each specific session for the Team Leader, Facilitator, Presenters, Host and others who are involved in making the meetings happen.

56. **Prepare opportunities for Practice**: If your team or organization will require participants to eventually lead meetings on their own, invite them to sign up for a free account so they can practice any time (especially for those who may participate in design, delivery or facilitation – or even for Action Learning team members). WebEx, Adobe Connect, GoToMeeting and others offer free trial accounts for 30 days or longer. WebEx also a free 3 person account (see www.webex.com).

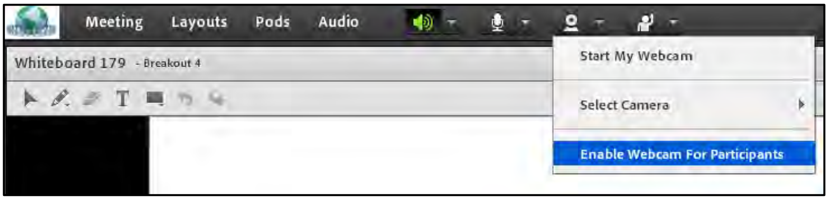
57. **Beta test the Meeting to perfect interactive elements**: Dry run the presentation with a facilitator and a team leader and preferably a participant as well to ensure that the content and the technical transitions work properly. Leave plenty of time prior to the actual virtual meeting to make appropriate revisions.

58. **Material/Reference Checklist**: Develop a list of all materials that need to be available for the virtual meeting.

59. **Permissions and Privileges**: Develop the list of permissions that learners require for each session and include in presenter's pre-session checklists and notes. Depending on your platform, this could be to remember to assign privileges to participants in WebEx



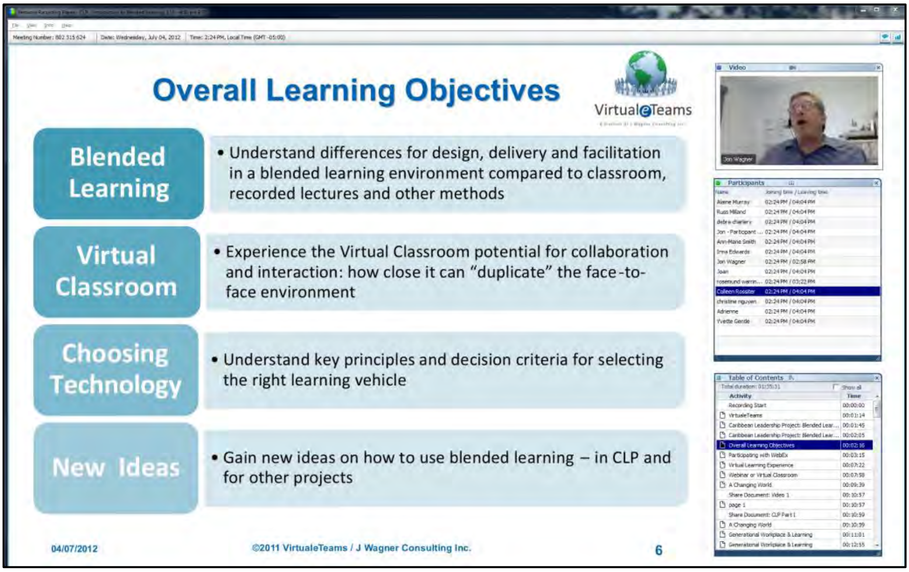
Or it could be to ensure that the presenter or facilitator remembers to enable microphones or Webcams for participants in Adobe Connect.



60. **Connect Participants**: Find novel and innovative ways to interconnect meeting participants. For example, ask each participant to use his or her cell phone camera to take a picture in his or her immediate environment best illustrating some topic and then e-mail it to the presenter. The presenter can then share these pictures with everyone using their e-mail system and the shared desktop feature.

61. **Recording**: Record the meetings and make the video recordings available to participants and other stakeholders. Detailed recording, downloading and streaming instructions should be available from the Meeting platform providers such as WebEx and Adobe Connect on their website. These recordings may be "streamed" from a web site or downloaded to a PC for easy viewing. A summary of the chat output from brainstorming and Q & A can also be viewed.

    As shown below, the recorded virtual meeting does not duplicate the experience of an interactive virtual meeting session. WebEx for example shows the video of the presenter (but not participants). It does show the list of participants and it includes a table of contents that viewers can use to jump to specific parts of the presentation.



    We have found that recorded sessions are most valuable for the following applications:

    a. **Review Previously Attended Virtual Meetings**: Participants can review material and discussions for a virtual meeting they previously attended. They can review the whole session or jump a specific section. The limitation is they will not be able to participate in the discussion or use the interactive tools, but they would have done that in the live session.

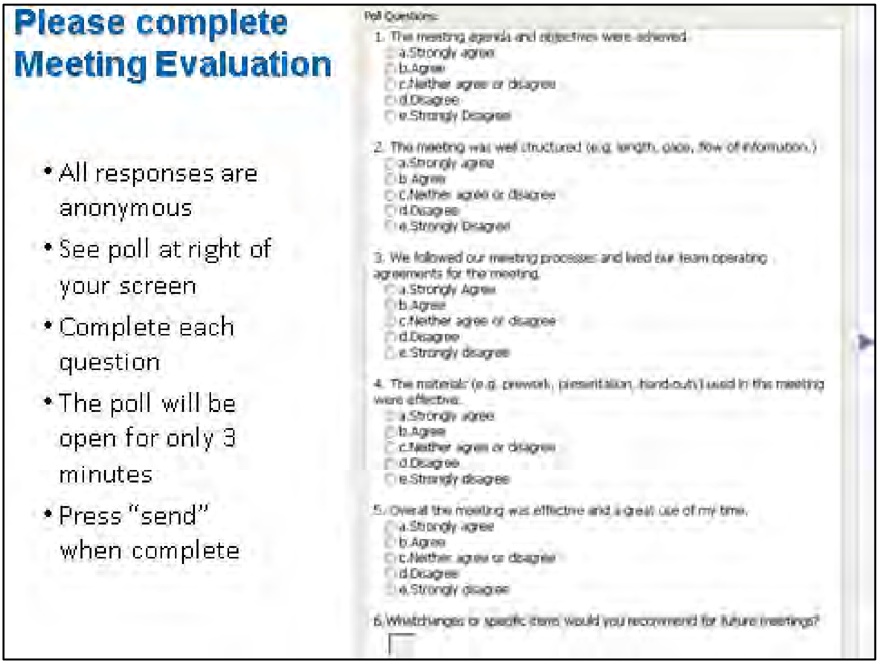
b. **Review a missed meeting**: Participants were not able to attend a specific Virtual Meeting for business or personal reasons can view the session after the fact.

c. **Watch a prepared presentation from a leading expert or sponsoring leader**: At times, it may not be possible to have presenters participate live for a Virtual Meeting, or it may be determined that a brief presentation by an expert or sponsoring leader can be recorded as a webinar. In these cases we recommend that you include reinforcing discussions or activities prior to or following the recorded webinar to provide an incentive to view it, and perhaps test for understanding or knowledge retention.

62. **Edit recordings**: Edit the video recordings into logical chunks for use in shared resource libraries for the team or organizations' websites or wikis. Detailed editing instructions should be available from the Virtual Classroom platform providers such as WebEx Training and be part of the support tools available on their website.

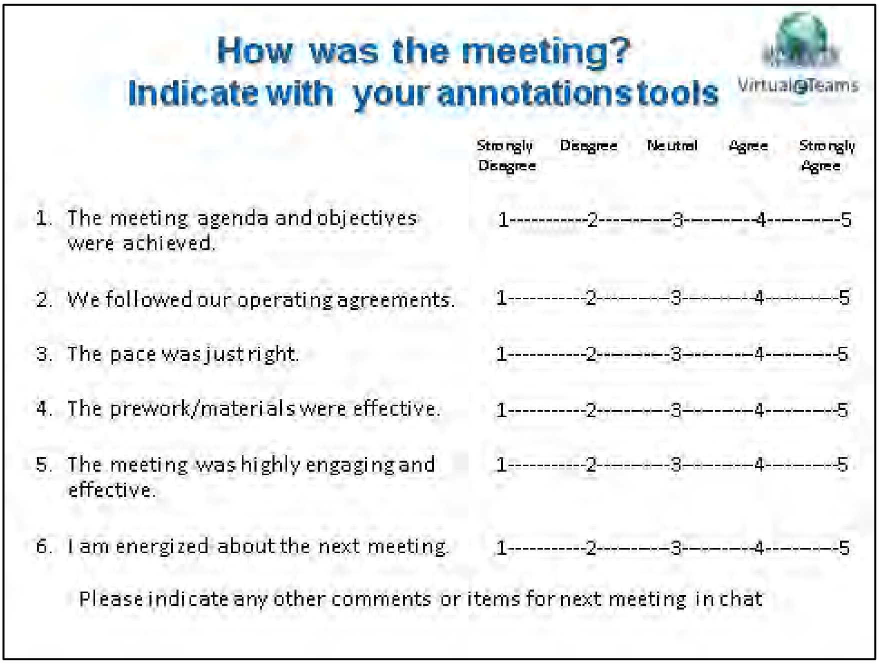
63. **Evaluation**: Conduct a meeting evaluation at the end of each session and provide the feedback to the Team Leaders and Facilitators. It is important to ensure the poll is prepared and tested prior to the meeting to ensure there are no delays or complications when "live."

One of the more common approaches for an evaluation is to use the polling feature of the Virtual Meeting environment. The results of the poll can be shared immediately with participants, or used to get anonymous feedback (you will tend to get more constructive and honest feedback). It is helpful to show a screen shot of the poll and provide instructions for the Team Leader or Facilitator to walk participants through the process, especially for the 1st meeting in a series.



The evaluation can be conducted different ways in different sessions such as a poll in one session, a chat in another for open feedback or a show of hands to specific questions on a rating scale.

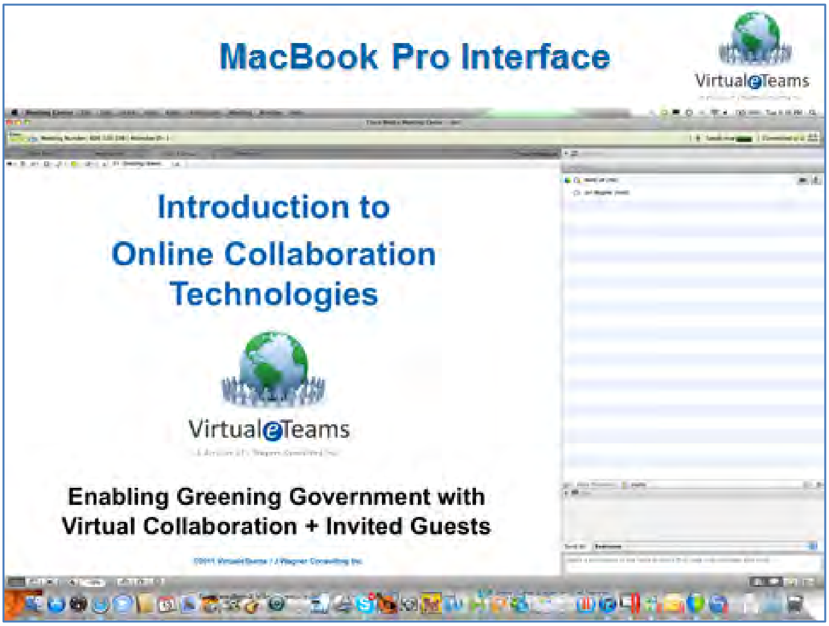
Please see below for an example of how to obtain a quick rating of a few things on a visual PowerPoint slide to get quick feedback. This is most useful when there are regular meetings and the objective is to just get a quick indicator and the participants have already developed a degree of trust.



A more detailed evaluation may be required to solicit more specific feedback in order to generate critical feedback and drive meeting structure adjustments.

64. **Design for Multiple PC Platforms and Browsers**: A key consideration often overlooked by the designer is the fact that participants or even guest speakers may use different browsers (Explorer, Google Chrome, Foxfire or Safari). It is important to test materials in each browser and determine if special instructions are required.

It is also possible that participants or presenters use different laptop platforms (for example a MacBook Pro rather than a Windows PC). In this case, it is important to prepare screenshots and explanations appropriate for those other platform to explain how to interact with the annotation tool using that platform. For example, in Safari and the MacBook Pro, the interface is different, and participants may become



confused if the materials show what it is like in Windows, when they see something very different.

We like to prepare these alternative screenshot examples to help instructors, facilitators and hosts explain annotation tools which may look different on different PC platforms.

7. Planning: Meeting Administration and Minutes

The meeting administrator communicates meeting details prior to the event, manages attendance and communicates logistics, documentation and minutes to the team leader and participants. The team leader or facilitator, meeting scribe, or an administrative support person may perform this role.

Best Practices

65. **Administrator/Leader/Facilitator Checklists**: Prepare comprehensive checklists for all pre- meeting, meeting and post-meetings activities, working with the meeting leader, planner, facilitator, scribe and presenters aligned to the specific meeting and the actual roles individuals will take. These could include but are not limited to the following:

    a. One Week before

    - Confirm meeting and solicit input on agenda and current items
    - Confirm roles for the meeting (Leader, Scribe, Timekeeper) and meeting templates depending on the type of meeting (for example minutes for Strategic planning meeting may be different than minutes for a standard operational meeting)

    b. Two days before

    - Send agenda and confirm owners and timing for all items on the agenda.
    - Send any pre-work material or post in a shared workspace. Provide links for all material required for prework, use in the meeting or for access and reference.
    - Invite new participants to sign on early to test connection
    - Prepare/finalize polls and locate in easy to find file folder to make it easy for retrieval.

65. **Administrator/Leader/Facilitator Checklists (Continued)**

- Prepare emails for participants to send out immediately following session (presentation materials, reference material, chats, poll results, etc.).

c. 20 minutes before session (Leader and Facilitator)

- Reboot computer to have fresh PC. Open only the applications needed for workshop.
- Log on 20 minutes before session – Leader/Facilitator. The Facilitator and/or Presenter may start-up a second PC and sign-on to have a participant view of the Virtual Meeting).
- Load Presentation material, files to share, polls, timer, and this checklist (include any website links you will use on checklist to make it easy to find).
- Assign privileges to participants required for session.
- Connect with headset and test speaker and microphone volumes.
- Test all loaded documents to ensure they are accessible and functional, especially video files both on the presenter host computers and the participant computers
- Include backup of all files on Host, Presenter and extra PCs in case of technical failure on one PC. The host service should automatically transfer control.

d. 15 min before session (Host/Technical Support/Presenter):

- Welcome each person as they join by name on chat and audio to ensure they are connected, have good audio, video and can use chat and hand up.
- Take attendance to record who participated.
- Invite participants to use private and public chat and ask questions.
- Troubleshoot with participants

65. **Administrator/Leader/Facilitator Checklists (Continued)**

- Monitor chat and raised hands
- Give 1 minute warning before you start or manage the delay if participants are late, keeping all participants informed when you will start.
- A best practice is to always start on time to set and meet the participant's expectations.

e. During the session (Facilitator/Presenter):

- Explain that the session is being recorded and start recorder. Indicate "Start Recorder" on slide to prompt the Facilitator.
- The facilitator should continually monitor chat and hands up to ensure questions and comments are viewed and responded to in a timely manner. The host may catch the presenter's attention by speaking at the appropriate time to read out a question from chat or call on a person who has raised their hand.
- Monitor the time and send private messages to the presenter.
- Open the PowerPoint notes section for facilitation instruction, but it always good practice to keep the chat open to see messages, especially from the Facilitator.
- Keep Chat open to "Send to Host" to be able to quickly send a message (Presenter).

f. For the Break:

- Tell participants about the break and start a time countdown by sharing a web browser at link: http://www.online-stopwatch.com/countdown/ .
- Stop recording during break – restart at end of break.
- Invite questions via hands up or chat.
- Open up chat and monitor messages, responding to questions.

65. **Administrator/Leader/Facilitator Checklists (Continued)**

g. At the end of session, when everyone else signs off:

- Save poll and chat – review and reformat as appropriate for distribution.
- Send presentation material, reference sheets, Chat & Polls
- Send recording link – as soon as it is available on administration site (about 1 hour after session closes).
- Send poll evaluation results to client/management.
- Send any other pre-work.

66. **Invitation**: Develop Invitation to Participate and access the meeting with simple clear instructions which include:

a. Subject Line: Session, Date Time.

b. Date, Time, Logon information and the correct link, number and password.

c. Reference to detailed instructions attached to the e-mail for inexperienced users.

d. Set expectations regarding prerequisites in terms of computer systems requirements.

e. Recommend use of a headset with built-in microphone or use of telephone if that is not available.

67. **Detailed Instructions with Screenshots**: It may also be useful to develop detailed access instructions for inexperienced users (with screen shots) and indicate to invitees in the main e-mail that more detailed step-by-step instructions are included in the attachment for inexperienced users or if they have any difficulties connecting to the session.

68. **Example Detailed WebEx Access instructions** (see below):

Please see your invitation for the Time, meeting hyperlink, Access code and password.

Note: If for any reason, you cannot access the meeting online, please call in to the audio part of the meeting using the following numbers and access code and discuss your issue with us:

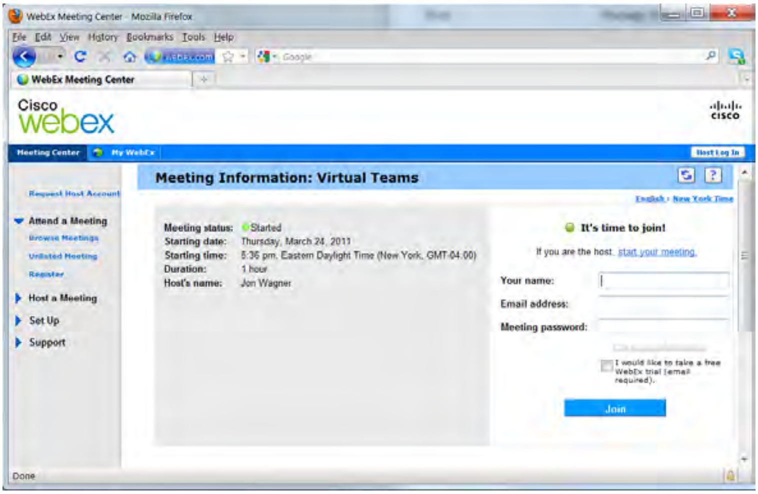
- Call-in toll number (US/Canada): +1-XXX-XXX-XXXX
- Access code: see meeting invitation
- As a last resort, call Russ Milland at +1-XXX-XXX-XXXX

Simplified instructions for connecting to our online sessions are as follows:

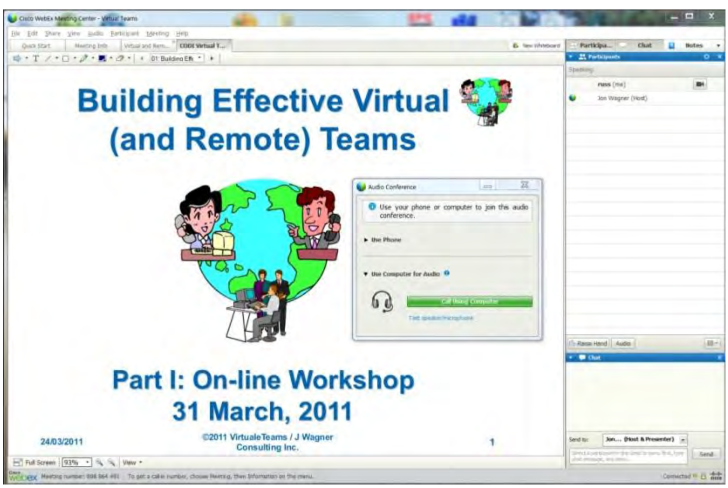
1) Please plan to join the session at least 5 minutes before the designated time so the session can begin on time (if this is the 1st time you have tried to connect, it may be helpful to sign on 10 minutes early so all the software is downloaded to your PC).
2) We strongly recommend that you close down all unnecessary applications on your computer.
3) Please join the WebEx session on your computer before joining the teleconference by clicking on the provided meeting hyperlink, or copying it to your browser:
4) Please 'accept' all requests by WebEx or related software (e.g. ActiveX) to be installed on your computer. (Note: It is important to close down other applications so that you do not miss the messages which could be hidden behind other windows).
5) Note: You may notice that WebEx software will download to your PC or Mac computer when you do this. If this happens, watch for messages from your computer asking you permission to proceed and accept any you see. Note that if you have many screens open sometimes these messages can be hidden behind the screens so please close down other applications. Be patient. It may take the software a few minutes to finish setting up before you see the shared screen from the meeting host.

68. **Example Detailed WebEx Access instructions (Continued):**

6) The following window will appear:



7) Enter your name and email address.
8) Enter the password from your meeting invitation if requested.
9) Click "Join" to join the meeting.
10) You will now see a new window open which is the shared workspace for the session which provides for the visual part of our session.



68. **Example Detailed WebEx Access instructions (Continued):**

11) An "Audio Conference" window will be open on this screen. (If not, click on the "audio" tab at the top left of the screen and then click on "audio conference" to open it.)
12) You will be able to access the teleconference on-line toll-free if you have a high quality headset or microphone and speakers on your computer by clicking on the green bar: "Call Using Computer" for the audio. (You will also be given the option to test your speakers and microphone).

    Note: you may need to click on the "Use Computer for Audio" to make the green bar appear.
13) If your headset and microphones do not give you a quality connection, you can access the teleconference by telephone by calling:
    - Call-in toll number (US/Canada): +1-XXX-XXX-XXXX
    - Access code: see above
14) You are now fully connected to the group and will be able to access all of the other powerful features available for collaboration using WebEx.

Other Tips and Guidelines

Exploring the "Audio Conference" Controls:

As mentioned, it is preferable that you use your microphone and headset connected to your computer to access the audio portion of the session by clicking on the green bar labelled "Call using your computer". If you cannot see the green bar, click on the text "Use computer for audio" to make it appear. The green bar will turn red. By using your computer for the audio portion of the session, you will NOT incur long distance telephone costs. Use a quality headset with a microphone built in to it to get the best possible audio.

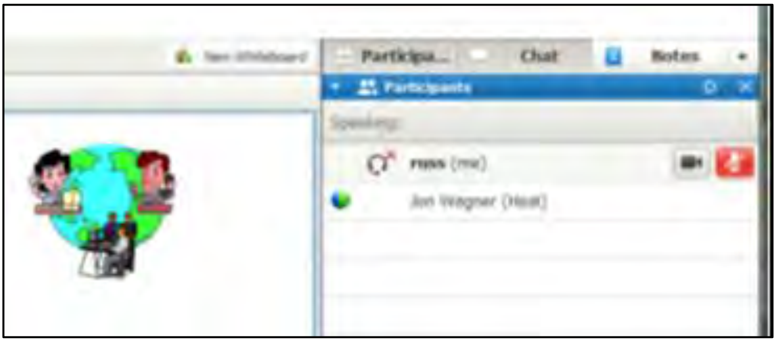
If you do not have a headset or speaker and microphone on your computer, you have option of using your telephone to call in, BUT you will incur long distance charges for the duration of the session. To use this option, call the number shown for telephone access and use the access code and attendee I.D. if requested.

68. **Example Detailed WebEx Access instructions (Continued):**

If you do not see these numbers, click on the text ‘Use Phone’ to make it appear. The screenshot below shows what you should see:

Muting Your Microphone

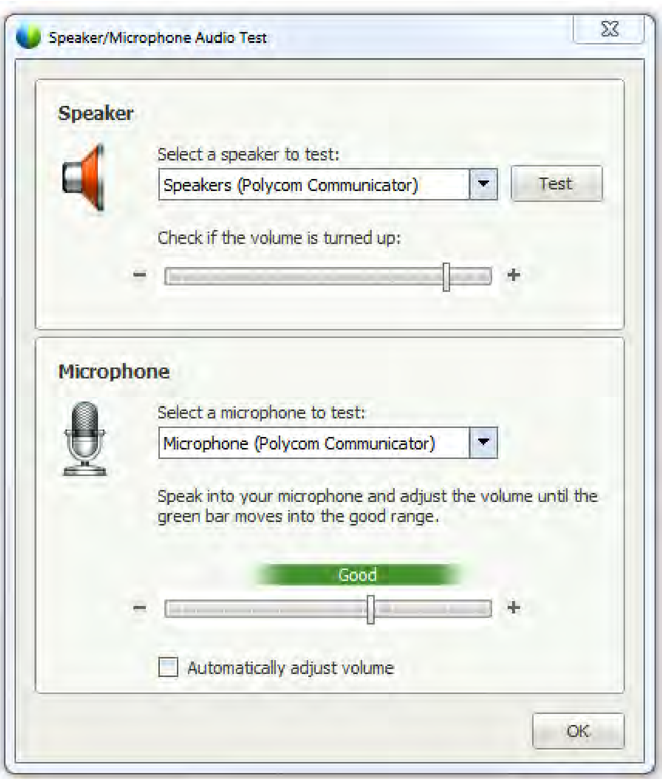
When the session is in progress and we are not in an interactive dialogue, it is good etiquette to mute your microphone either by using a mute key on your telephone (if you are using your telephone) or by clicking the microphone icon at the upper right of the screen beside your name in the list of participants. When you mute your microphone, the microphone icon turns red so that you can see that it is muted (see image below).



68. Example Detailed WebEx Access instructions (Continued):

Testing your headset, speakers and microphones

If using the computer for audio access, you can test your speakers and microphone (or headset) by clicking on the “audio” tab at the upper left of the screen and then “speaker/microphone audio test” to open up a small window with controls you can use to test your speakers and your microphone (see image below).



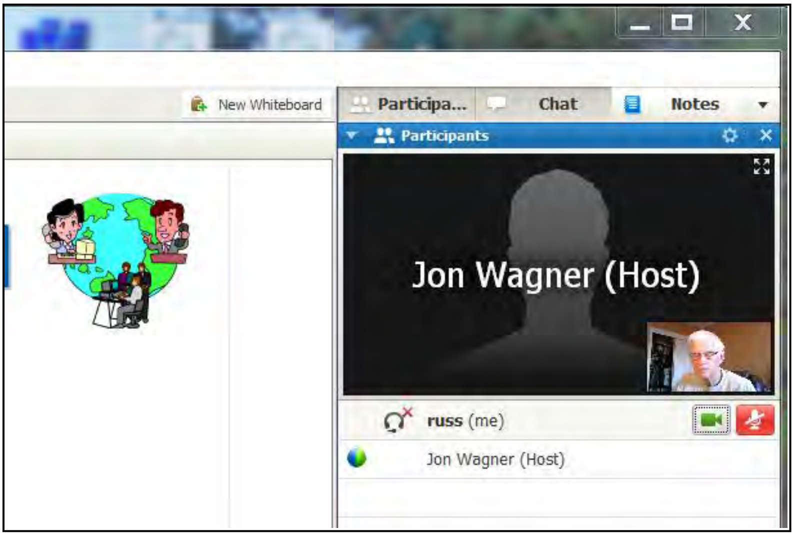
At any time you can use the “audio” tab and then the “audio conference” button to bring up the “audio conference” window and use the controls in that window to disconnect from the audio part of the session or switch from telephone to computer access or vice versa.

68. Example Detailed WebEx Access instructions (Continued):

Using your Video Camera

You may also use your video camera in your computer to provide a video image as well of yourself in the shared workspace. If you have a camera, click on the camera icon beside your name in the participants list to turn your camera on. The icon will turn green and your video image will appear in a corner of the video display space at the upper right of the screen.

When you talk during a session, your video image will be used to fill that part of the screen for all participants (see image below). You may turn your camera off at any time and that can be a good practice as video transmission can slow things down.



69. **Invitations**: Send invitations to participants well ahead of the virtual training sessions. Send out an additional invitation with access information to sessions in automatic calendar update mode.
70. **Reminders**: Send a reminder e-mail with access information out the evening before the scheduled session.
71. **File Management**: Build a separate easy to locate folder on your computer with all of the files that will be used in the Virtual Meeting (PowerPoint slide decks, documents, polls, whiteboard templates, etc.) and send a copy to your Presenter and Producer to also do this as backup. Place it in the area to which your Virtual Meeting software automatically goes when you start a "share a file" request.
72. **Administration using Virtual Classroom Administration platform**: Many of the Virtual Classroom solutions such as WebEx Training Centre, Adobe Connects, Saba, etc. include best practices and tools to simplify invitations and handling of confirmations.
73. **Meeting Minutes and Summary Documents**: There are several ways to provide a summary of the workshop as well as poll results, Chat documentation, video files, intersession work, discussion group questions, etc.
    a. **Meeting Minutes**: One of the most important responsibilities of the meeting Scribe is to take accurate meeting minutes and distribute them in a timely manner (usually with 24 hours of the meeting). Section 5 of this book describes in more detail best practices for the development and use of Meeting Agenda and notes templates.
    b. **Shared Document Space**: Put files in a shared document space or web sharing location for easy download. This is my preferred approach whenever possible as it allows participants to go there any time for the correct documents. An email or document alert system can alert participants when new information is available with a direct link.

c. **Email Transcript post session**: Use the Send transcript function in the Virtual Meeting toolkit if available (see WebEx). This may be very easy to do, however, you may want to reformat or edit certain material before sending. The big positive is that any slide annotations by presenters or participants will be included.

d. **Email materials in advance**: This may be useful to ensure that all participants have the necessary material in advance. This may especially useful for video files that need to be loaded on a participant's computer.

e. **Transfer Files**: Specific files can be transferred to participants during or at the end of the session directly through many Virtual Meeting systems.

8. Delivery: Meeting Facilitation

Meeting facilitation in a Virtual Meeting environment often carries a dual responsibility. On one hand, meeting facilitation focuses on meeting dynamics and ensures everyone observes team and meeting operating agreements and actively participates and is heard by others.

On the other hand, meeting facilitation may also include a hosting function that requires mastery of the web collaboration technology, and ensuring that everyone can participate actively using the collaboration tools. The facilitator ensures that the live delivery goes according to plan. These two facilitation roles may be split between several people.

Best Practices

74. **Equipment**: Follow the recommended best practices listed under technical support below including extended monitor, using a 2nd participant computer, have backup of presenter materials in case of

equipment failure, always connecting by LAN instead of wireless and using an uninterruptable power supply for your PC, monitor and modem (see the author's set up in the picture above).

75. **Headset**: Use a headset with a microphone for optimal audio. We recommend that if you are going to be presenting often, to invest in a high quality USB headset. The authours have also found that a high quality USB speaker phone can be used as well with the added advantage of no headset wires (see example from Polycom below):

http://www.polycom.com/products-services/voice/desktop-solutions/pc-speakerphones/CommunicatorC100S.html

76. **Master the Virtual Meeting functionality**: Take all the possible training available in the features (shared applications, annotating of whiteboards, file sharing, notes management, etc.) and learn how to use them so that you can evaluate when each feature can best add to the collaborative meeting experience. Experiment with each feature to understand the nuances and options.

77. **Cross Training**: It is a best practice to cross train on equipment and Virtual Meeting facilitation so that Administrators, Facilitators, Leaders and Presenters can support each other and potentially take over specific tasks if others experience unforeseen technical or other issues.

78. **Understand the Meeting Design and Virtual Meeting Design Principles:** The meeting Facilitator must thoroughly understand the meeting design, as well as be familiar with all the principles of meeting design. The Facilitator or Leader may also be the meeting planner/designer.

79. **Dry run and practice, practice, practice:** Don't try a new synchronous virtual session or non-routine meeting without a rehearsal or two. Spend time with a producer to be clear on roles and interplay, and practice the interactivity to get it right.

80. **Orienting new Users**: When bringing in new members, bring them up to speed on the technology before any meeting so they have the right configuration and software and can get the full benefit of the interaction. Consider hosting a pre-session for new users to get familiar with the technology and the processes for using it.

81. **Roles during meeting:** Manage the technical details of the event, such as monitoring the chat window for questions, creating breakout groups, and loading polls and saving outputs such as recordings, poll results, chat logs, etc. The facilitator may introduce the leader and presenters, and then work in the background to support the presenter to monitoring chat, responding to raised hands and addressing or handing off technical problems to technical support.

82. **Welcome Participants and ensure they can participate:** Before the session begins, greet individual participants upon entering the virtual meeting room and ensure that they have functional audio and video connections. Help those who are new to the environment to gain a basic knowledge of how to participate using the Virtual meeting tools.

83. **Technical Support - Level 1**: Troubleshoot technical problems during the event, and have an alternative way to reach technical support resources if required. This may include helping a participant who experiences technical difficulties reach a technical support person and follow-up with them. Chat is also an effective tool to privately provide

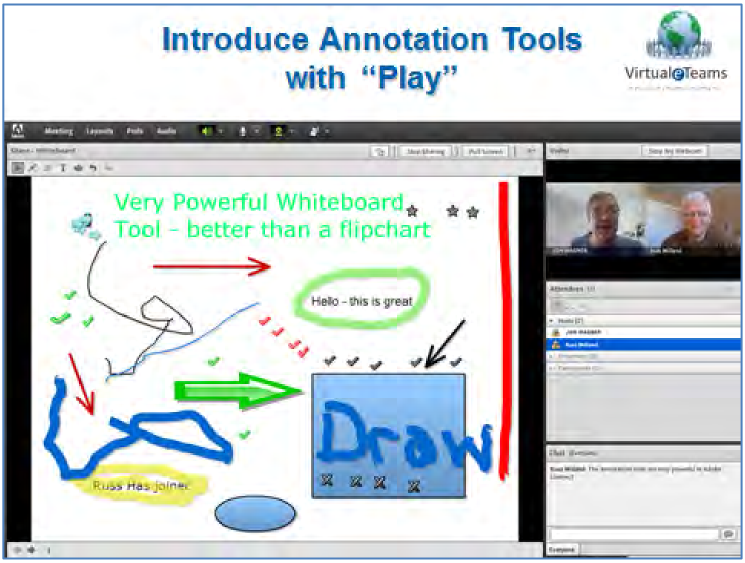
support. If the platform included a "Breakout Room", the Moderator could go offline briefly or bring in a technical support person to help. (see more best practices for technical support in Chapter 10: Technical Support)

84. **Preferences**: Use "Preferences" to assign sounds to indicate when a message is sent needing attention or a participant's hand is raised.

85. **Volume Check**: Check that your voice is not coming through too loud or too softly. This can be done both with the Facilitator or Host as you are setting up the meeting, and later with participants.

86. **Recording**: Advise the participant that the session is being recorded and why.

87. **Introduce Participants to the Tools and have fun:** The authors have experimented with different approaches and believe that the most effective way to introduce the collaboration tools is to prepare a screenshot that shows a few of the tools, a few at time. Introduce each annotation tool, and then ask participants to experiment and "have fun" or "play" with the specific tool, while verifying that each and every participant can use the tool.



Once each person has demonstrated ability to use the tool, and then introduce another slide when the participants need to use the tool to accomplish a business related task**.**

88. **Prompt some form of interaction every 3 to 5 minutes.** From raising hands, to talking, to chatting, to asynchronous exercises - connect with your audience as often as possible.

89. **Keep tuned in to the participants:** In order for communication and learning to stay active, listen and "feel" for the atmosphere of the participants. Just because eye contact and body language are not available doesn't mean the participants are not sending signals. Avoid letting the session become a passive experience for participants.

90. **Record questions asked in the session's chat function**: To make sure you get back to everyone with complete answers, have participants log questions in the chat room and save the chat file for later reference. Remember that spelling doesn't count in a chat!

91. **Use a meeting assistant**: An assistant (could be the host or administrator) can help participants with technical issues, monitor chat rooms, assist subject matter experts or help you take advantage of and best use the interactive collaboration tools.

92. **Collaborate**: Online meetings should be highly collaborative and engaging. In a live environment, participants should be encouraged to interact with each other and view each other as resources.

93. **Encourage coaching**: Set up virtual meeting spaces where participants can coach each other, practice important presentations, and discuss work issues.

94. **Parking Lot**: Use a “parking lot” to hold issues that are raised but germane to the topic. Use the Notes function or optionally use a specially labeled whiteboard for this purpose.

95. **Monitor Chat**: An important role for a moderator or host is to continuously monitor chat and determine if there are questions or comments that make it appropriate to interrupt the flow of the

discussion and catch the presenter's and/or participant's attention. They may also provide immediate answers to certain questions if appropriate without interrupting the flow of the presentation or discussion.

96. **Read out Chat**: It is often helpful for all participants in the session as well as those watching a recorded video for you to read out the chat messages. The messages should be audio recorded for reference by future viewers of the session especially if the Chat log is not included in the video.
97. **Dead air**: Manage "dead air" time. If you are doing something that results in a silence for a brief period, tell the learners what you are doing so they do not get concerned that they are disconnected
98. **Getting Attention of Presenter**: It is helpful to practice the best way to do this with the producer (likely through chat) so you work together seamlessly as a team during the session. For example, use the annotation "pointer" to click in a predetermined area to catch the presenter's attention and force a look at the chat area for a private message. Another approach may just to speak up during a brief pause and indicate that someone has their hand up or has posed a question in chat to address immediately.
99. **Chat for Brainstorming or soliciting opinions**: Before asking learners to post their answers in Chat, the Producer should post the question in chat to precede the thread of answers. This also makes it easier after the meeting to extract the brainstorm results and post a summary for all participants in a structure way.
100. **Assist Leader or Presenter with interactive tools**: The host or moderator should be very familiar with all the interactive features of the platform, and be ready to assist in the event the presenter is less experienced with the tools or just needs another pair of hands. They can help give the presenter a bit of a break by coordinating Polls or Q & A sessions and ensuring the session runs smoothly.

101. Pace: Advise the presenter of the pace of the session through private chat messages. It may be useful to build in key checkpoints in the session to ask the participant's openly about the pace, or have a slide that asks participants to use the annotation tools to indicate: Faster, Slower, Just right. The moderator can also set the expectation with Participants to indicate in private chat any thoughts re pace so that participants can provide the input to let the producer know privately.

102. Emoticons: Teach participants to use emoticons (if available in addition to the "hands up") to provide feedback at will. If your Virtual Classroom does not include this feature, you can encourage your participants to use chat to provide feedback. It may be useful to suggest a few common shortcuts for feedback such as "Faster", "Slower", "Happy", "? ", and how you will interpret them.

103. Evaluation and Follow-up material: Conduct a session evaluation at the end of each session and provide the feedback to the Presenter, Administrator and the Developer.

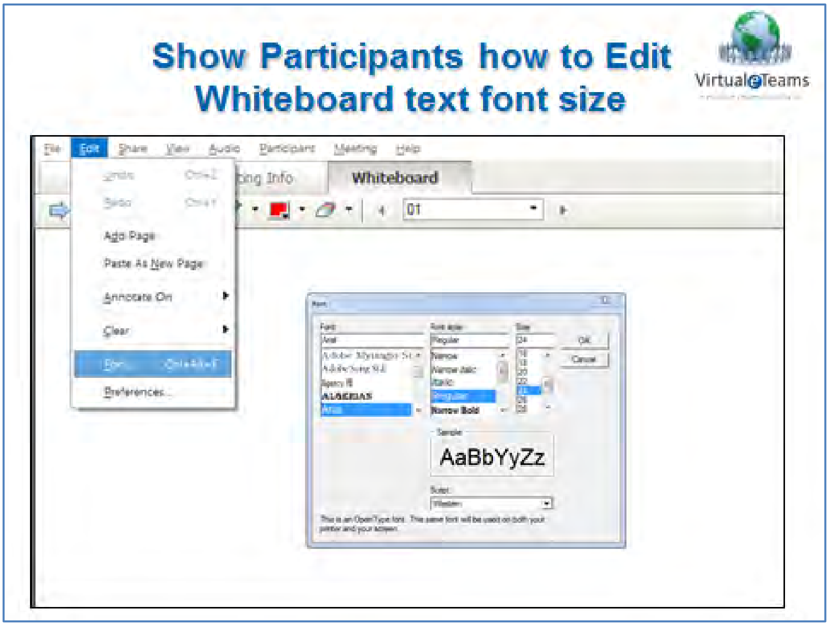
The evaluation can be conducted different ways in different sessions. Work with the developed to ensure the evaluation is relevant to your need for data and feedback.

Also ensure that the administrator, presenter or you save the chat and other material from the session before closing the session. Finally, provide the summary material to participants in a timely manner and close the session by clarifying next steps and any follow-up material they will receive. (See more details regarding workshop summary documents in the best practices for Administrators)

104. **E Script**: Follow the notes (or script) prepared for the session to ensure that key events happen. Be ready to catch the attention of the presenter.

105. **Be Prepared to Support Multiple PC Platforms and Browsers**: As discussed in Chapter 6 on Design, it is also possible that participants or presenters use a laptop platform (for example a MacBook pro rather than a Windows PC) that is different. In this case, it is valuable to log on with a 2nd PC set-up to use a different browser (or even be a MacBook Pro) when you anticipate that others have different tools so you can provide them with appropriate support (see screenshot of a MacBook Pro in the Designer section, Best Practise # 62).

106. White Board Font Size: When using whiteboards in platforms such as WebEx, advise the learners that they can change the font and its size by accessing the "font" menu under the "file" tab at the upper left of the screen. Remember to ensure you have enabled participants to use the annotation features.



107. Evaluation and Follow-up material: Work with the Host to conduct a session evaluation at the end of each session and ensure that the chat and other material from the session are saved before closing the session. Clarify next steps and any follow-up material participants will receive. (See more details regarding workshop summary documents in the best practices for Administrators and Hosts)

108. Remember to save recordings, annotated presentations, chat dialogues, notes taken and polling results before you end the session.

9. Delivery: Leading, Presenting

The Meeting Leader is concerned that the overall meeting is a great use of team members' time, and contributes to team effectiveness. Guest speakers can also easily be brought into virtual meetings as professional or technical content experts or senior leaders to sponsor an initiative. It is important to ensure the leader and/or guest speaker is fully prepared to deliver in the Virtual Meeting environment.

Best Practices

109. **Equipment**: Follow the recommended best practices listed under technical support below including extended monitor, using a 2nd participant computer, practicing host/presenter backup a, always connecting by LAN instead of wireless and using an uninterruptable power supply for your PC, monitor and modem (see the author's set up in the picture below).
110. **Participate before you facilitate:** Anyone that is planning to present in a synchronous environment should first experience a synchronous event as a participant. This helps provide the needed perspective for the facilitator that will aid in his or her turn at the controls. It is helpful to attend sessions from top facilitators as well as poor ones to experience the difference.
111. **Be an advocate:** Presenters and facilitators must support the virtual meeting initiative and be advocates within their organization. If the presenters don't like their role or the virtual environment (preferring the "real" classroom), the participants will know it, and the success of the initiative will suffer.
112. **Expand the Virtual Meeting model**: Use synchronous tools for conferences, meetings, workgroups, seminars, lectures, announcements, etc.

113. **Master the Virtual Meeting functionality**: Take all the possible training available in the features (shared applications, annotating of whiteboards, file sharing, notes management, etc.) and learn how to use them so that you can evaluate when each feature can best add to the meeting experience. Experiment with each feature to understand the nuances and options.

As mentioned earlier in this guide, many vendors offer trial accounts or free accounts (i.e. WebEx offers a free 3 person meeting account, that has many of the basic features). We recommend that facilitators and presenters obtain an account for personal use which will help them build the skills to use the system with greater comfort and expertise.

Most Virtual Meeting vendors have comprehensive job aides, templates, user and participant guides and training available which provide novice, intermediate and advanced users with an understanding of the specific functionality and capability of the Virtual Meeting environment. Find out all the specific tools available and take the training to build your expertise. Finally, practice, practice, practice.

114. **Use the principles of Meeting and Presentation design discussed in Chapter 6**. Keep virtual presentations exciting, dynamic, engaging and compelling when you engage the human senses – and stir emotions:
    - Develop better PowerPoint materials with fewer words and lots of visuals.
    - Show faces – include warm pictures of presenters, biographies.
    - Show and Tell enthusiasm. Vary the volume, pitch and pace – surprise them.
    - Use a team approach – different voices, perspectives and stories.
    - Make the sessions interactive with a diversity of collaboration and engagement experiences. Build in audience participation or feedback every 5-10 minutes.

- Use polling to gain input on topics or issues or feedback on the pace of the presentation.
- Use whiteboarding for the most innovative flip charting imagined.
- Use text chat for brainstorming – and everyone can even print it!
- Use application sharing to display information, demonstrate features or tools, and edit documents and polling and surveying.
- Use audio and whiteboard breakout sessions for small group discussion.
- Enable annotations so people can point, draw, mark anything they see on screen.
- Video clips, cam videos and singing in harmony have been done to further engage participants.

115. **Determine what Facilitation Support you need**: If the guest speaker needs certain functionality they are unfamiliar with, it may be appropriate for the Facilitator to help with the facilitation of interactive aspects.

116. **Cross Training**: It is a best practice to cross train on equipment and Virtual Meeting facilitation so the Leader, Facilitator and Presenters are able to support each other and potentially take over specific tasks if others experience unforeseen technical or other issues.

117. **Checklist**: Review the checklist several days before the workshop and ensure you have all the files and chat required for the session (see checklist example content under administrator). Where possible, do a final run through of this with the Administrator and Team Leader a minimum of 1 hour prior to the session, loading all material and testing all files and connections, assigning participants privileges, etc.

118. **Dry Run**: For more complex strategic and developmental meetings, practice prior to a session to test the timing. If possible involve the facilitator and if possible another participant (the administrator or a person less familiar with the content). Practice all file sharing and annotation features with which you are less familiar.

10. Technical Support

Technical Support ensures that everyone participating in the Virtual Meeting is appropriately equipped with technology and access to the Virtual Meeting environment. The meeting facilitator typically provides first level support (especially during the meeting). The Information Technology support organization may provide second level support to participants. The vendor of the Virtual Meeting service will often provide third level support to the administration and delivery staff, resolving connectivity and platform functionality issues. The following are best practices for setting up of the technical environment.

Best Practices

119. **Extended Monitor**: Connect your computer to a second monitor (and even a third monitor), and "extend the display" so you can open other material on a second or third screen.
120. **Use a 2nd "Participant" Computer**: It can be very helpful to use a 2nd "participant" computer to also sign on there as a participant (use a name like "Test Participant" to make it distinct in the list of participants. This allows you to see exactly what a participant sees and when they first see it.
121. **Host/Presenter Backup**: If your primary PC fails for any reason, the host role will automatically transfer to another participant in most Virtual Meeting environments and you can then recover your computer and rejoin the session.
122. **LAN vs. Wireless**: If at all possible, connect your computer to the internet via a LAN cable to ensure maximum network bandwidth.
123. **Power Always**: Use an uninterruptible power supply for your computers, modem and routers (which connect your computer to the Internet) to ensure that you can maintain access to the Virtual Meeting in the event of a power failure. A fully charged laptop will

remain functioning for an hour or more in the event of a power failure but modems, routers and desktops will not.

124. **Use Service Provider to fullest**: The Producer, Presenter and Administrator should all use the service provider to the fullest, researching the documentation, but calling on the professionals well before any session to get answers to questions.

125. **Watch out for firewall:** Firewall issues can bring the best program to a dead stop. Application sharing and other features may not function through a firewall without working with the technical support staff ahead of time. Always test the features and functions when working with a new client system, or limit use for a general public session where different participants have limitations.

126. **Schedule a technology test session for workshop series**: When working with participants who have not used the platform before and interactivity is key to the Virtual Meeting experience, schedule a special technology test session and ensure each participant can connect and understands the basic features.

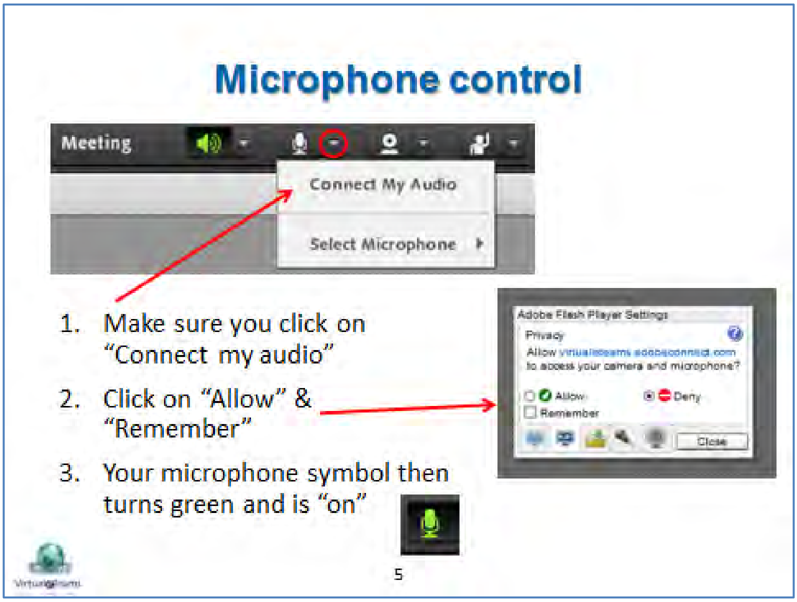
127. **Supporting Participants with Technical Difficulty**: There are a number of best practices related to providing support to participants with technical difficulty. The key is to help ensure a positive user experience to all participants, both the ones who are connected and ready to participate, and the ones who cannot connect properly:

    a. **Schedule a technology test session for workshop series**: The above practice helps minimized workshop disruption by dealing with major technical difficulties before the workshop begins.

    b. **Log on early**: Ask participants to log on to the initial sessions 10 – 15 minutes prior to the start time to make sure they have a good connection, and can fully participate.

    c. **Provide Support telephone number**: Provide participants with a phone number they can call to help connect to the virtual classroom.

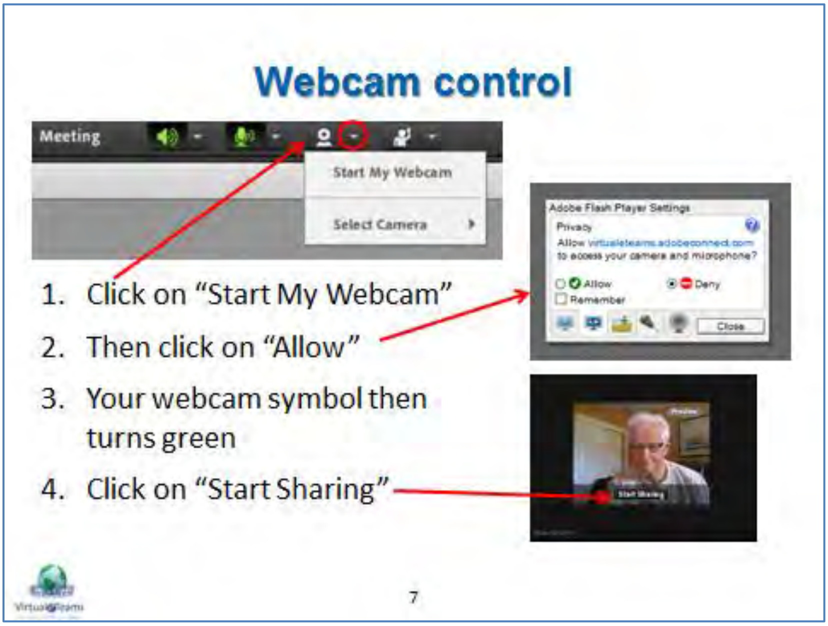
d. **Use Welcome Slide to Show Participant a common set-up issue**: Some platforms require participants to enable their microphone before they can speak (such as Adobe Connect). A welcome slide showing participants how to do this, especially the 1st few sessions, can be very helpful, and minimize delays.



e. **Use Breakout room for Participants with Technical Difficulty**: If one or two of the participants are have difficulty with their set-up (for example, audio not working), it may be best to place the participant in a breakout room (if available on your platform), and work with those participants away for others.

f. **Help Participant with Screen Sharing**: Pass control to participant to "Share their Screen" and then you will be to walk them through the steps to test their settings. In some platforms you can actually take control of the participant's PC and check out the settings directly.

g. **Prepare "Technical Support Screen Shots"**: Identify common settings issues and prepare instructional slides to can use with participants with common connection and set-up issues and load on a separate tab or layout to use when needed (see example below which explains Webcam setup in Adobe Connect).



128. Internal Technical Support: Work with your IT staff to purchase access to the platform and get it set up for internal use.

h. Request the IT department to provide a technical support resource person for the Virtual Classroom Platform.

i. Test all aspects of bandwidth and get their recommendations for an optimum connection.

j. Ask IT to determine the best way to share videos with the Virtual Classroom platform (several alternatives are listed above).

k. Work with IT to prepare internal users guides which incorporate internal procedures for accessing and using the Virtual Classroom.

11. Participants Best Practices

The following best practices apply to all participants of a Virtual Meeting, including those with specific roles such as the leader, facilitator, timekeeper and scribe.

Best Practices for the Participant

129. New Users: Print the instructions sent about the scheduled Virtual Meeting session in order to have a copy of the telephone numbers and access codes in case that is the only way that you can make a connection to the event.

130. Schedule time and Sign-on 5-10 min early: It is proper etiquette to connect to the Virtual Meeting session 5-10 minutes prior to the start of the session to ensure the technology is working and your PC has time to download any software to your PC. When you arrive in the session, participate in chat with the group or privately with individuals if the feature is available.

131. Contribute agenda items and complete all pre-work prior to meeting: The Virtual Meeting Environment is best used for collaboration and interaction, not just one-way presentations. Where the goal of a meeting may be to present information, participants are often expected to read material, watch videos, work on action items and report back or complete another activity alone or with a small group. It is critical that each and every participant take responsibility for meeting effectiveness by contributing agenda items and complete the assigned tasks prior to the live session to get the best results. If it is not realistic to complete the preparations, alert the meeting leader as soon as possible to discuss if the agenda needs to change to be more realistic, or if other planned activities need to be revised.

132. **Restart PC**: Restart your computer before the learning session and close applications except those needed for the Virtual Meeting session once you restart the computer.
133. **Use Headset**: Use a headset with a microphone for the best possible audio experience if an IP (Internet Protocol) audio connection is available.
134. **Webcam**: Optionally acquire a webcam so that others can see you during the virtual training sessions.
135. **Power**: Ensure that your laptop is plugged into a reliable power outlet.
136. **LAN vs. Wireless**: If at all possible, connect your computer to the internet via a LAN cable. Wireless connections do work but are often slower and have more restricted bandwidth issues which can result in poor video connections.
137. **Participate in Test Sessions**: Take advantage of opportunities offered to join a test session if you have not participated before in an online Virtual Meeting using the chosen technology. If the Virtual Meeting software has the option of downloading software or participating through a Web Browser, choose the option that will work best in your technology infrastructure.
138. **Technical Support**: Ensure that you have access to technical support if you need it. If you have trouble with the audio which you cannot remedy, use the alternate telephone call-in number. Ensure you have a good long distance plan as often the telephone number is U.S. based.
139. **Mute Microphone**: Mute your microphone if you are not actively participating in the dialogue, but don't forget to unmute when you are ready to say something.
140. **Prepare Work Environment**: Close doors and windows if possible to avoid background noises and distractions.

141. **Avoid Distractions**: Avoid distractions such as the temptation to check your email or issue emails. Respect the others on the teleconference and pay attention. Research has proven that distractions reduce learning and retention.

142. **Participate actively during the meeting:** During the meeting, each and every participant should be totally present and participate fully. This may include:
    - Take responsibility and be accountable for action items
    - Risk posing "less popular opinions"
    - Participate actively and provide unique perspectives

143. **Actively Support Team and Meeting Operating Agreements:** Participate actively in the development of team or meeting operating agreements. Once they are agreed to, be prepared to hold everyone accountable to follow team and meeting operating agreements and appropriately surface the issues.

144. **Participate actively in Chat, Hands Up and Annotation Tools:** The more you actively participate, the more you will get out of it. If there is a task and you have any difficulty accessing or use the annotation tools, raise your hand or let the facilitator or host know in chat immediately so that someone can help you.

    It is also helpful to give quick feedback with Emoticons or private chat concerning pace (slow down or hurry up). In a virtual environment, it is less visible to presenters if the participants are becoming distracted or finding the pace too fast – so these tools can help keep everyone aligned.

145. **Evaluations:** Please complete all evaluations with your honest feedback.

12. Collaboration Technologies for Virtual Teams

A virtual or remote team, or geographically dispersed team, like every team, is a group of individuals who interact through interdependent tasks to achieve a common purpose. Unlike a conventional team, a virtual or remote team works across space, time and often cultural and organizational boundaries using interactive communications technologies.

12.1 Virtual/Remote Teams Challenges

Over 20 years of researching and working with Remote and Virtual teams at Hewlett-Packard, Agilent Technologies and with other companies and clients, we have found that like all teams, the key building blocks of effective virtual and remote teams are:

- **Goals:** having a clear shared focus of team purpose, vision and objectives
- **Roles:** mutually understanding each team member's expected contributions towards achievement of its goals
- **Processes:** developing clear agreements of how the team will work together: meetings, planning process, problem solving process, decision making process
- **Relationships and values:** establishing links which bind individual team members together: communications, trust, openness, participation etc.
- **External collaborations:** clearly defined relationships and commitments between the whole team and partners, subordinates and customers

Building on those basics, our research has shown that virtual and remote teams need to particularly pay close attention to the following 11 success factors:

1. Leading with shared purpose, vision and goals
2. Developing measurable accountabilities and deliverables
3. Building and maintaining trust
4. Communicating and providing access to information
5. Providing timely feedback
6. Creating a sense of team and community
7. Using travel effectively: "Travel for Trust"
8. Making cultural diversity an advantage
9. Orienting new team members
10. Developing team norms and operating agreements
11. Mastering collaboration technology

These success factors are discussed in detail in the *"Building Effective Virtual and Remote Teams Handbook" Consulting Inc. (2011)".*

This monograph will focus on the success factor number 11 (see above): Mastering Collaboration Technology and assumes that the reader has determined that the team would like to concentrate on building their effectiveness by mastering collaboration technology.

12.2 Using technology to collaborate across time and space

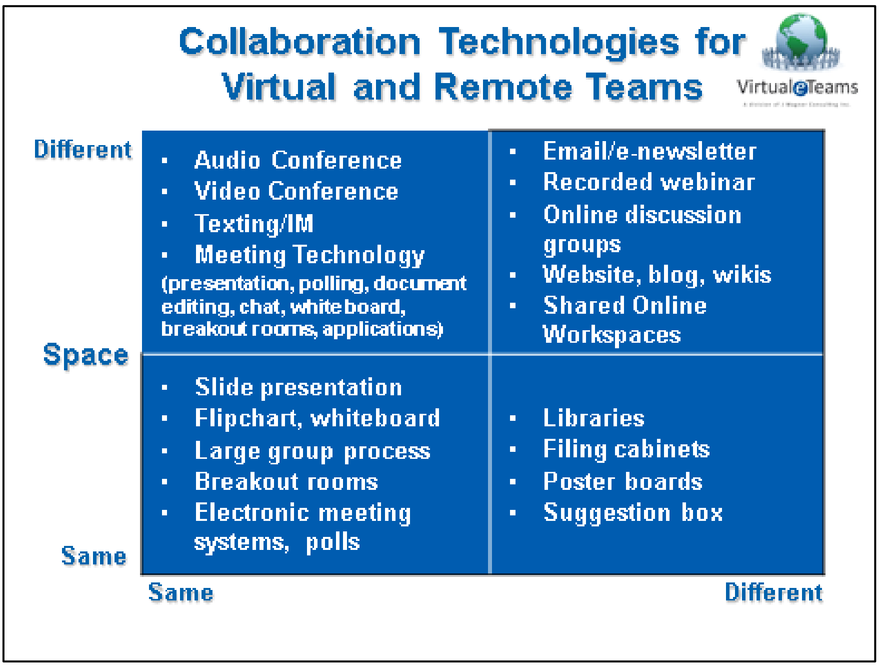
In order to understand how technology applies to teams which are co-located and those who operate virtually it is useful to think in terms of Time and Space.

Co-located team members need to periodically meet in person with one another as well as with other stakeholders. They do of course use collaboration technologies to help them do so. Some of the collaboration technologies used primarily for such face-to-face meetings are listed in the figure below in the lower left "same space – same time" quadrant.

When co-located team members communicate with each other across time, they use the collaboration technologies listed in the lower right "same space – different time" quadrant. Many of these technologies are physical rather than electronic.

A team is considered virtual when team members are separated by distance. In the upper left "same time – different space" quadrant, we find a list of some of the collaboration technologies which allow them to meet and communicate with each other and their stakeholders in real time.

In the upper right "different time – different space" quadrant, we find technologies which allow them to communicate across time and manage and share information they need to successfully function across time.



Guide to Specific Collaboration Technologies

The following sections provide a brief overview of the different collaboration technologies available to a virtual or remote team. Each of these technologies is described in more detail, along with extensive checklists of best practices in the "Building Effective Virtual and Remote Teams Handbook"

12.3.1 Audio conferences

Audio conferencing has also been available to teams for many, many years and has been and remains an effective tool for meeting virtually. As the cost of communications channels has dropped dramatically in the past decade or two, teleconferencing costs have dropped dramatically as well.

There are a large number of no-cost reliable teleconferencing services available in the marketplace such as www.freeconference.com (telephone-based) and www.skype.com (computer based) where the only cost to a participant is the cost of the long distance call to a U.S. telephone number (for North American users). Most telephone service providers provide excellent long distance plans such as unlimited long distance calling in North America for a few dollars per month. If you wish, these services will provide meeting participants with a 1-800 number for which you, the teleconference host, will be billed.

Conference calls add an extra layer of complexity to the challenge of holding effective meetings. Team leaders may hold weekly staff meetings where the same three people do all the talking. It leads you to wonder what the other three people are doing. You may think to yourself that they never contribute and that they must be totally disengaged. It is true that the people who are not participating could be disengaged. On the other hand, the three people that always talk could also be dominating the conversation. For everyone to benefit from audio conferences, explicit ground rules must be established such as those found in the *"Building Effective Virtual and Remote Teams Handbook (2011)"*

Here are some best practices for using audio conferencing:

- Use every trick you know about how to run a meeting.
- Have a structured agenda which is sent out ahead of time and review at the start of the call.
- Encourage full participation.
- Consider asking one of the participants to act as a facilitator to ensure everyone has an opportunity to contribute. For large groups, assign other roles: note taker, timekeeper, etc.
- Have checkpoints where the leader or facilitator draws people into the discussion.
- If there is anyone who is not participating, explicitly request his or her input.
- Limit interruptions and digressions.
- Don't let one or two people dominate.
- Make sure that everyone on the line can hear everything being said. If you experience technical difficulty use the conference call services of a telephone provider to act as host.
- Disseminate lengthy or complex information in text format before the call starts. If new documents are generated during the call, distribute them as quickly as possible via fax or email.
- Speak clearly—don't shout (especially on a speakerphone) and avoid slang that may not be familiar to call participants from other regions, cultures, or countries.
- When you jump into the conversation, preface your statement with "This is ____" (your name).
- Don't try to do anything else while on the call. Other participants can hear you typing and won't appreciate it. If you must attend to something else briefly, use your "mute" button or put the call on

hold. Be careful, many systems play music while on hold. This can be most embarrassing and disruptive.

- Try audio breakout sessions for more interactive topics. It should be noted that many teleconferencing systems do allow for breakout meeting and regular users are not aware of this – check with your service provider.
- Wrap the call just as you would any meeting. Summarize what was said, confirm decisions and reiterate action steps. Distribute notes immediately via email and follow up on the action steps.

12.3.2 Texting, instant messaging and twittering

Instant messaging services have become very popular as a means of immediately sending another person a brief message in real time. This is done through telephones, smart phones and through personal computers. Typically it has been used for person-to-person communications.

However, in the past few years, the Twitter service (free) has evolved to allow an individual to follow the instant messages issued by others on Twitter or even on other services such as Facebook as well as issuing instant messages to those who choose to follow their messages. Facebook itself implements a form of instant messaging in that individuals can follow what others post on their "walls". Instant messaging can be found embedded in many of the comprehensive collaborative technology services described later in this Guide.

Is such a service useful to a virtual team? It could be if being able to immediately push a message to another team member is necessary to the efficient operation of the team. For many years, IBM has had a very popular internal instant messaging system. Their culture has shifted so that they respond to an instant message more quickly than to a phone call. As a result the communications etiquette at IBM is to first probe another person through instant messaging to see if they are there and then follow up with a phone call if they are.

However, in most organizations, if this technology is in place, it is usually used through the telephone systems relying on everyone having a texting-capable cell phone.

Here are some best practices for texting and instant messaging:

- Common courtesy still rules. Contrary to popular belief, composing a text message while you're in a face-to-face conversation with someone or in a meeting is just about as rude as taking a voice call.
- Remember that text messaging is quite informal. Texting shouldn't be used for formal invitations or to fire an employee. The casualness of texting diminishes the strength and meaning of the message.
- Be aware of your tone. It is extremely difficult to discern tone in text messages, just as in email. What seems to you to be a completely innocuous message may be grossly misinterpreted by the recipient, causing certain discomfort if not irreparable harm.
- Leave the slang to the kids. Don't expect your stodgy superiors at work to be hip to the lingo of the texting streets.
- Remember that texting can be traced. Do not consider them to be private and secure.
- Be considerate of others' schedules. Don't assume that because you are awake, working, not busy, or sober that the person you're texting is as well.
- If it’s an important matter requiring immediate attention, make a voice call and leave a voicemail if necessary.
- Remember that your phone does have an off button. There are very, very few things in the world that absolutely cannot wait.

12.3.3 Inter-site video conferencing

As communications costs dropped over the past few decades, the use of video conferencing grew, especially in large organizations where “video conferencing rooms” were typically set up to connect various worksites together. Today, video conferencing capabilities are also beginning to appear everywhere as part of the other service offerings such an instant messaging, Internet-based telephone and web conferencing services. Here are some best practices for using Inter-site video conferencing:

- If you are holding a large, multi-participant conference, be prepared for a major production.
- Use everything you know about running effective, interactive meetings: agenda, interactive, focus.
- Appoint a moderator to keep the mechanics on track and a facilitator to focus on group process.
- Hire or appoint a director to operate the cameras, microphones and lights. Make sure the person is familiar with the equipment and can troubleshoot before and during the conference.
- Distribute any lengthy or complex information in text form prior to the conference.
- If you will be using document cameras have a supply of large paper and wide markers.
- Position everyone at an equal distance from the camera and microphones.
- Ask each participant to place a card (name, location) in front of him/her, visible to the camera.
- When everyone is on, start the proceedings by admitting that everyone’s a little uncomfortable in front of a camera. Come up with an icebreaker to relax the participants.
- Look into the camera when speaking directly to someone at another location to make eye contact, but no more often than you would look directly at someone in the same room.

- Many things that are not a problem in a live meeting are distracting on a video monitor. Don't fidget. When you look into the camera, keep your eyes steadily fixed on one place.
- Ask people not to wear white, bright patterns or colors and avoid narrow stripes or herringbone.

12.3.4 Individual video conferencing

Today, video conferencing capabilities are being built into cameras, smart phones, tablet computers, laptop computers and personal computers. The capability is also beginning to appear everywhere as part of service offerings such as instant messaging, internet-based telephone and web conferencing services.

Many of the best practices already discussed under Inter-site Videoconferencing equally apply for individual video conferencing,
Here are some best practices for using individual video conferencing:

- Before turning on your video camera, check that you look presentable.
- Position yourself and your camera so there are no distractions in the background such as bright lights, etc. and so that your image is similar to that of a newscaster on television in terms of size in the video.
- If you are using a desktop system, you may have limited means to control the lighting and decor in your room. However, there are still measures you can take to ensure you make the most of your surroundings. While modern cameras are very good at automatically exposing to present a clear, useful image, they are still not as sophisticated as the human eye. If you are sitting in front of a bright background, many cameras will underexpose to compensate, which can result in your face looking very dark. A cynical expression with too much truth in it says "an ounce of image is worth a pound of performance".

- Use video when there is a need for relationship building with the others for meaningful dialogue. Consider turning off the video when you have strong rapport with the others if bandwidth is at a premium and performance can be impacted.
- An example which is often seen is desktop users sitting at a computer with windows in the background. If you have windows behind you in your office, shut the curtains to prevent this excessive light. In an ideal situation an endpoint will have lights facing both down and on an angle towards faces. The down lighting provides the general ambient light for the room, while the angled lighting removes shadows from eyes and other facial features caused by the down lighting. In your office if you can face windows this is an ideal way of achieving this effect. The general rule to remember is that evenly lit faces provide the best image.

12.3.5 Web conferencing

By web conferencing, we mean synchronous technology service offerings which provide an integrated virtual meeting experience. Since the front of this book is devoted to more detailed best practices for Virtual meetings and web conferencing, we will not repeat those best practices here.

12.3.6 Fax

Along with the Xerox machine, the Fax machine was a marvellous development that revolutionized the communication of paper-based documents in its time. However, the use of faxes is fast becoming obsolete as alternative technologies have evolved. So do ask yourself first: Does it have to be a fax?

Use email instead whenever possible. Scan a printed document and attach it to an email. If the document is longer than five pages, the recipient may prefer overnight delivery rather than tie up a phone line and get a "hard to read" copy. But if you must fax, here are some best practices.

- A good fax is short and to the point.
- Don't fax documents that are already hard to read. If you must use a fax to send highly detailed drawings or tiny text, use a photocopier to enlarge the image before faxing it and select a high-resolution mode.
- Always start with a clean copy. Use black ink for any handwritten notes.
- Leave wide margins because some machines might cut them off.
- Use a large font (12 point).
- If the fax is important and unexpected, or if the machine is shared by multiple users, call to let them know the fax is coming and always include a cover sheet to make it clear who is the intended recipient.
- Never assume a fax has been received until you get confirmation.
- Don't send a fax late at night to someone's home. The phone may ring and wake people up.

12.3.7 Voice mail

The telephone has been a critical communications channel for teams for a long time. In one-to-one communication situations, voicemail systems have enabled us to use the telephone for asynchronous communications as well. There has been a strong tendency in recent years to use emails instead of voicemail to leave messages for others, perhaps because it can be done without running the risk of the other party answering the phone!

The good news about voicemail is that it is far more efficient to communicate a longer message by voicemail than it is by email unless you are an incredibly fast typist. Some integrated communications systems allow you to access your voicemails via your email system. They also allow you to listen to emails which are read back to you.

Here are some best practices for using voice mail:

- Always identify yourself and say the date and time of the call.
- Leave a concise message stating the purpose or action requested first (write an outline before you call, if you find it hard to compose on the fly). Convey concrete information and don't ramble.
- Always leave your phone number.
- Speak slowly and distinctly when giving phone numbers or facts that the recipient may want to write down. Repeat your telephone number twice, to save people the need to replay the message.
- Watch your emotions. One-way communication can come across angrier, more hurtful, or more self-pitying than intended.
- If you do need a callback, say where and when you'll be available or risk playing phone tag.
- Voice mail can be used as records. If you receive voicemail that you feel you may need later, save it. When leaving a voicemail, remember, your message is being recorded and may persist in the system.
- Some integrated communications systems allow you to access your voicemails via your email system. They also allow you to listen to emails which are read back to you.
- Also consider your own voicemail greeting – such as: "You have reached the recorded voice of Jon Wagner, I am unable to answer the phone at the moment, but will get back to you within 4 business hours. If it is urgent you speak with someone right away, please call….. Call your own phone and listen to your message to ensure it sounds appropriate and don't forget to leave an extended absence message when you are away.

12.3.8 Email

The use of email has exploded over the past few decades. It is easy, fast and provides a record of all conversations (for better or worse). However, email etiquette has taken a while to catch up with the new technology. It also allows for the use of distribution lists to efficiently and easily communicate to selected groups of people.

Here are some best practices for using email:

- Send a separate email for each topic. It is easier for recipients to respond and file or delete.
- To make your message stand out in a crowded in-box, use the subject line to make a clear statement or specific request. When expecting a response or action include ‘’Action Requested” in the subject line and then begin email with a clear statement of “what” is being requested and “when” it is needed.
- Put the most important content at the beginning. Recipients don’t always scroll down to the end.
- Make it brief, focused, specific. Deliver the most information in the least space.
- Keep paragraphs short (three or four lines) and put a blank line between paragraphs.
- Attach files if you must send something longer or you need to use headings, bullets, tables and graphics. Format it to be easy to read and understand. Use lots of white space.
- When replying, use your software’s quoting feature to include a copy of the original text.
- Never write email when your emotions are raging. Anger and sarcasm come across stronger in text than they would in person. An email is a permanent record that can come back to haunt you.
- DON’T USE ALL CAPS because it looks like you’re shouting.
- Watch out for inappropriate humor.

- Proof read! Always review your message before pressing “Send”. Don’t rely only on spellcheck. You don’t want to be famous for writing about the “pubic” service.
- Use the blind copy feature when sending an email out to a large number of recipients so that the recipient does not see a long list of people in their message (unless you feel it is important that they see everyone that was sent the message).
- Do not include more than a couple of dozen people in your distribution list for the email as many email systems between you and the recipients will refuse to process your message as they will suspect that you may be spamming. Blind copying large lists helps here. If necessary break up your list into smaller lists. If you are sending out newsletters, use web-based services such as www.aweber.com or www.constantcontact.com which manage a large distribution list in a manner which minimizes this threat.
- Do check your spam filters frequently to ensure that important incoming messages don’t get lost.

12.3.9 Sharing calendars and scheduling

Calendar sharing services are inherent in many office software products such as Microsoft Office in its Outlook email system. But everyone must be using the same Outlook system to use this facility.

Another form of calendaring service (free) can be found at a remarkably simple elegant service at www.doodle.com where you, as a meeting organizer, can map out a series of date and time options for a meeting and then email these to all potential participants asking them to visit the website and indicate their available times and dates.

There are many other calendaring and scheduling systems on the market. Almost all of these are fee-based systems.

Here are some best practices for using shared calendaring and scheduling tools:

- If the calendaring system allows for offering multiple choices to attendees, do offer enough choices (5 to 10) to optimize the chance of everyone being available on at least one date.
- Do schedule well ahead of time if at all possible to avoid calendar conflicts.
- Do send out email reminders to recipients who have not yet responded to close on a meeting date within a day or two of the initial request.
- Follow up with a phone call reminder to close on the date quickly.

12.3.10 Discussion groups, forums and social networking

Prior to the appearance of the World Wide Web, the Internet was populated by a large number of Bulletin Board Systems (called BBS's) where folks could post a message and then others would read them and reply. The "threads" of these messages and replies were then readable and searchable by others. With the appearance of the Internet, these BBS's evolved into many other forms such as those found in Yahoo Groups, Facebook, LinkedIn, Plaxo and even YouTube.

Discussion forums and groups can also be embedded into team or enterprise websites for use within the enterprise or with a larger community of outside stakeholders. Tens of millions of these discussion groups (also called discussion forums) now exist on the Internet.

While Facebook is predominant for personal social networking, the giant in the business world is LinkedIn. We recommend that every professional would benefit by setting up a LinkedIn profile and use it to connect with professional associates. LinkedIn is fundamentally different from Twitter and Facebook in that it is a site for professionals and businesses rather than for socializing. LinkedIn reports that it operates the world's largest professional network on the Internet with more than 225 million members in over 200 countries and territories and there were nearly two billion people searches on LinkedIn in 2010. http://press.linkedin.com/about.

In recent years, while social networking sites have grown significantly, Chief Information Officers (CIOs) began to block their employees from these sites. However, a May 26, 2011 PRNewswire release reported an updated study of 1400 CIOs by Robert Half Technology that indicated that only 31% of companies block social media sites. They found that there is a growing acceptance of the value of social networking and that some companies blocked more personal sites such as Facebook, but allowed LinkedIn:

- 31% of companies prohibit all access (54% in 2009).
- 51% of companies permit access for business purposes only (19% in 2009).
- 14% of companies permit access for limited personal use (16% in 2009).
- 4% of companies permit any access for personal use (10% in 2009).

With the advent of the Social Web it is getting easier and easier to find people just because of the plethora of profile and other information out there. Limiting usage of LinkedIn is like preventing your employees from attending industry exhibitions or going to professional seminars. And of course, LinkedIn groups are an excellent way of connecting with other professionals to learn current best practices and opinions in a very collaborative and interactive way.

Here are some best practices for using discussion groups and forums:

- If you haven't already, join LinkedIn and search for groups that share your professional interests. You are allowed to join a maximum of 50 groups, as well as start additional ones of your own. Keep your profile up to date to accurately reflect your skills, interests and experience.

- Determine if the discussion groups you find valuable are blocked in your organization and if you need to set up a separate account outside the firewall. If this is the case you may want to use LinkedIn for external professional discussions and the internal system for your virtual team.
- Initially be an observer on any discussion groups or forums that you join to get a sense of the unwritten rules of behavior in that community before you actively participate.
- Post one discussion question or observation per posting to avoid complex dialogues in the message threads.
- Set up your own discussion group for your virtual team and use it actively – it can help organize your internal communications around discussion threads instead of just being lost in a flood of unconnected emails.
- Unless you know that you will check back regularly, do check the flag which requests that the system notify you by email of any comments or replies to your posting (or if you wish all postings) so that you can promptly respond.
- Do not actively or openly sell yourself, your products or services in your postings or replies unless that is clearly acceptable in the discussion group in which you are participating.

12.3.11 Broadcasting

One of the most common downfalls of initiatives managed by teams is lack of communication within the team and with key stakeholders. Providing team members and stakeholders with access to important documents and information is a passive way of doing this. There also must be an appropriate level of proactive communication happening. For example:

- Internal team communications on a regular basis with both professional and personal information being shared to help build community.
- Regular communication of progress, issues and challenges to ensure everyone including external stakeholders are aware of them.
- Informal or formal team or project newsletters to keep all stakeholders appropriately informed of the team's progress and reinforcing the business case for the team's initiative.
- A Wiki, which is a well-structured body of knowledge. Every authorized user can contribute to building the content and cross-reference the information elements to each other. A classic example of this technology in action is Wikipedia http://www.wikpedia.org.
- Blogs, which allow team members to post items of interest frequently in a newspaper-like column and allow others to comment on the postings.

Here are some best practices for using broadcast communications technology:

- Do not send out a newsletter too often or your readers will feel overwhelmed.
- Communicate with stakeholders regularly and in a clear concise way with links to more in-depth information if they need it.
- Adapt the communication to versions appropriate to different stakeholder audiences.
- Do use a message format (such as HTML) which allows you to include color, graphics and images to liven up your communication.

12.3.12 Document and file sharing

There are numerous services on the Internet which offer teams the ability to manage their team's documents and other information resources.

These provide both the ability to back up your valuable information as well as make it easily accessible to team members and other stakeholders authorized to access it. They are also a great way to move large files between team members instead of sending them as attachments to emails.

Often the service will offer a checkout facility to ensure that more than one person is not changing the master copy at the same time. These services are often included in more comprehensive offerings.

Best practices for using shared document and file management systems:

- Do implement a version control system for important documents so that changes are tracked properly in a disciplined way.
- Periodically audit files and adopt processes to ensure that all-important documents are being included and managed within the system.
- Do manage the access privileges carefully so that only currently authorized users have access.
- Ensure that backups are being made of all of your files and periodically test to ensure the backups are recoverable.

12.2.13 Websites and wikis

With today's technologies, it is quite easy and quite inexpensive to set up a website for almost any purpose. Other collaboration technologies described elsewhere such as file and document sharing and discussion groups or forums can easily be incorporated into such websites.

Wiki's are modelled on the fascinating structure used to build Wikipedia (see www.wikipedia.org), a remarkable system which was developed by volunteers and whose content is created and managed by volunteers from around the world. They built an online encyclopaedia which has over 4 million articles in the English language alone. It sets a model for the development of bodies of knowledge by teams of people to share knowledge and information. Many systems and services are now available to support the development and management of Wiki's.

Here are some best practices for using team websites:

- Ensure the site uses software that accelerates team collaboration by providing a logical, intuitive format for storing, is flexible to accommodate growth and use on more than one project, is comprehensive enough to grow without becoming cumbersome and lets users customize a unique graphic look to highlight team identity.
- Make sure it's up and running before the project starts. Introduce the website at the kickoff and take everyone through the site.
- The website manager should also maintain the website as the project progresses. New information and changes will need to be included.
- Assign an information manager to keep databases, timetables and all shared documents updated and organized so others can find them.
- Decide who will update data, how often and how team members will be notified of changes. If possible, automate this process.
- Develop a system for version control. If team members work locally with shared data, establish a process to download, revise or upload quickly so everyone is working with the most current version.
- When checking in a new version of a document, immediately email others to notify them of the change.

13.3.14 Virtual team workspaces

There are service offerings becoming available that integrate a number of the services we have described above into a "virtual team room". An excellent example of this is the service offering at www.huddle.com where the following services are all available within one easy-to-use interface:

- Task management
- File storage, versioning, checkout and approval
- Shared calendars
- Whiteboards
- Discussion groups
- Audio conferencing
- Web conferencing

Integration of web-based service offerings is a strong trend in the industry. Larger service providers are acquiring smaller ones to integrate their technology in their tool sets to make this happen.

12.3.14 Project management tools

There are many fine systems available such as Microsoft Project that manages a hierarchy of tasks and activities involved in managing a complex project. These are similar to workspace management systems but incorporate more formal project management approaches and methods.

While these are usually standalone services, some elements of task and project management are being integrated into more comprehensive team workspace systems such as the system found at www.huddle.com which include task management for simpler projects.

Here are some best practices for using project management systems:

- Match complexity and detail in the project plan and its processes and procedures for managing it to the size and complexity of the initiative.
- Use simple project management systems for simple projects such as spreadsheets or simple task management systems.
- Use sophisticated tools such as Microsoft Project for complex projects.

12.4.1 Technology Vendors: Same Time Same Place

These collaboration technologies support the traditional teams that occupy the same space for the same time. The electronic products obviously would also support virtual teams as well.

Type	Use	Collaboration Tool
LCD Projector	Display computer screen or DVD	• Available from many manufacturers ($300 to $4,000)
Flip Chart/ White Board	Capture discussion or present information	• Flip Charts, white board ($50) • Electronic White Boards ($1,000 to$3,000)
Agenda Management	Tools useful for formal or complex agenda management requirements	• Team Agenda 5: http://www.teamsoft.com/start.html • Agenda Pro: http://www.sharewareconnection.com/agenda-pro.htm • IQM2: http://www.iqm2.com/Products
Decision Support Tools	Meeting software that help team make decisions	• Facilitator: http://www.facilitate.com/ • ERGO: http://www.technologyevaluation.com/products-and-services/decision-support-software/ergo/
Meeting Systems	Tools to help capture information in a systematic way	• Microsoft Word - Outline Feature • Mind mapping: www.mindjet.com ($400) Polling tools: • Survey Monkey: http://www.surveymonkey.com

12.4.2 Technology Vendors: Different Time Same Place

These collaboration technologies support the traditional teams that occupy the same space but need to communicate across time possibly because they are working flexible hours or simply choose to do some work without face-to-face interaction. The electronic services could of course also support teams distributed across space as well.

Type	Use	Collaboration Tool
Suggestion Box/Idea Management	Make it easy for people to provide input and ideas – anonymously if it will help encourage greater response	• TRIZ: http://en.wikipedia.org/wiki/TRIZ • QMarkets: http://innovation.qmarkets.net • HypeIMT: http://www.hypeinnovation.com/ • FeatureSet: http://ads.featureset.com/idea-management/
Polling/Voting Charts	As simple as asking for a show of hands to using confidential input	• Survey Monkey: http://www.surveymonkey.com (Basic service is free; Pro version starts at $228 per year) • Infotools: - http://www.infotool-online.com/
Shared Filing Cabinets	Develop a filing system that the group can access	• See "document sharing" below
Group Scheduling/ Calendaring	Common calendar	• Microsoft Outlook or equivalent • Doodle – http://www.doodle.com (Free) • Google Calendar - https://www.google.com/calendar (Free) • Tungle - http://www.tungle.com (Free)

12.4.2 Technology Vendors: Same Time Different Place

These collaboration technologies support virtual teams that occupy different spaces and need to meet virtually at the same time.

Type	Use	Collaboration Tool
Audio Conference	Virtual real time voice communication with three or more participants	• Skype http://www.skype.com (Basic service is free; Premium $9.99/month) • Freeconference (Free + toll charge) http://www.freeconference.com • Instantconference (Free + toll charge) http://www.instantconference.com • Bell Canada Conferencing (Free + toll)
Video Conference	Live video with groups in each room	• Equipment and rental facilities typically available through telecommunications providers such as Bell Canada
Video Conferencing	Virtual Real Time Meetings with live video with each attendee in a different location	• Skype - http://www.skype.com Free (2 person); $9.99/month (10 person) • Microsoft Live Messenger - http://explore.live.com/ (Free) • WebEx http://www.webex.com/ Free (3 Users); $19/mo (8 person); $49/month (25 person) • GoToMeeting $49/m (25 person) http://www.gotomeeting.com/fec/
Texting/ Instant Messaging	Timely and efficient communications accessed any time, any place there is a connection to the internet	• Telephone-based Texting (Telephone based texting is usually part of your cell phone plan; remaining services are free) • Microsoft Live Messenger - http://explore.live.com/ (Free) • Skype - http://www.skype.com (Free) • Google Talk – (Free) http://www.google.com/talk/index.html • Twitter - http://twitter.com/ (Free)
Web Conferencing	Virtual Meetings and classroom	• **See Chapter 4 for an in-depth coverage of web conferencing technology.**

12.4.2 Technology Vendors: Different Time Different Place

These technologies support virtual teams who must communicate across time.

Type	Use	Collaboration Tool
Email	Well established replacement for "letters" to send text, attachments, web links, forms around the globe	• Google Gmail or Yahoo Mail or Microsoft Hotmail or AOL (Free) • Outlook/Office Suite (Part of ISP Service Plan) • Outlook Express (Part of ISP Service Plan) • Local Service Providers (Part of ISP Service Plan)
Discussion Forms	Allow team members to post messages visible to others. Messages are organized into discussion threads and stored for further comment	• LinkedIn - http://www.linkedin.com (Free) • Yahoo Groups - http://groups.yahoo.com/ (Free) • Google Groups - http://groups.google.com/ (Free) • Facebook - http://www.facebook.com/ (Free)
Document Sharing	Designed to hold your team files in a shared directory of files much like on your hard drive but accessible by any authorized person from anywhere anytime	• Google Docs/Apps - http://www.google.com/apps (Free) • Microsoft Skydrive - http://explore.live.com/windows-live-skydrive (Free) • Drop Box - $99/yr; 100GB; - www.dropbox.com • Box - http://www.box.net (5GB, 25mb max files – free) • Egnyte - http://www.egnyte.com (5 users; 1 TB; $40/month)

12.4.2 Technology Vendors: Different Time Different Place (Continued)

Type	Use	Collaboration Tool
Web Sites & Wikis	Develop to support a body of knowledge shared by a virtual team or community of practice	• Internet Service Providers • Google • Microsoft - SharePoint • Wiki Service providers
Broadcast Communic-ations	To communicate to all stakeholders or subsets of them regularly	• E-Mail Newsletters www.mailchimp.com (0-500 subscribers; $10/month) • Google - Blogging www.blogspot.com (Free) • Websites (free to low cost) • Twitter – www.twitter.com (Free)
Complete Solutions	Provide a team with a complete set of services in one place	• Google Apps - http://www.google.com/apps (Free) • Huddle – http://www.huddle.com • Microsoft Live/Office 365 - http://www.officelive.com/ • Microsoft SharePoint – http://sharepoint.microsoft.com • IBM Lotus Products - http://www-01.ibm.com/software/lotus/ • Saba - http://www.saba.com/online-collaboration-tools • Projecturf - https://www.projecturf.com/ • Traction Teampage – http://tractionsoftware.com • Campfire/Basecamp – http://37signals.com

13. Collaboration Technology for Virtual Teams Activity

This activity is excerpted *from "Building Effective Virtual and Remote Teams Handbook (2011)".* It is one of 24 Activities in the Handbook which can be effectively used to improve virtual team performance. It is being included here to assist you in determining how to further use collaboration technologies in improving your virtual team's performance.

Objectives/Outcomes:

- To understand where the team/organization should invest in collaboration technologies.
- To select specific collaboration technologies to implement and improve effectiveness.
- To identify a champion for leading the team forward with each chosen technology.

Timing:

- Approximately 1 to 2 hours.
- Timing assumes face-to-face sessions; virtual delivery will take longer.

Mastering collaboration technologies

This activity is most effective when it is preceded with an overview of collaboration technologies. An online demonstration of some of the newer collaboration technologies and some of the capabilities that virtual teams could consider using as a team would be very valuable. ***Chapter12 of this book*** provides a detailed overview of collaboration technologies or you may want to invite an expert to discuss this with your team.

Strategies for building collaboration technology capability

Research by Christine Bullen and John Bennett: **Groupware in Practice: An Interpretation of Work Experience** identified four critical success factors for teams in using collaboration technologies:

- **Champions**: Identify leaders to sponsor and support the technology to improve communications. The presence of a team member or leader who champions the introduction of the collaboration technology is a critical success factor.
- **Expectations**: Invest in understanding the full potential of the tools and build a vision of the future of how the team could evolve to be a peak performance virtual team. Set measurable goals to improve communication using collaboration technology to deliver results.
- **Training**: Train people on the practical features and tools they will use right away. A peak performing virtual team focuses on the human side of using the technology to enhance teamwork and deliver results.
- **Evolution**: Don't get stuck at a basic level as often happens with a new technology. Many people learn enough of a new application to realize only 10% of the potential gain in productivity. Share success stories and provide continuous training and resources to upgrade skill.

As your team considers the different collaboration technologies, ask who might want to champion one or more of these collaboration technologies.

Facilitation steps:

1. Prepare a flip chart using the ***Worksheet: Team collaboration technology approach*** (see below). Edit it as appropriate.
2. Convene a meeting of the team.
3. Provide a presentation or demonstration as discussed above or ask the team to read the relevant sections of Chapter 12 on the capabilities of the different types of collaboration technologies.

4. Brainstorm with the team the answers to these questions and capture them on a flip chart:
   - What are the things that we as a team must do better when we are remote from each other?
   - What is our vision of the future of how the team could evolve to be a peak performance virtual team?
   - Which of these are the top three to five areas of opportunity for us to significantly improve our virtual collaboration?
5. Optional Step: Have team members complete assessment below:

Collaboration Technology Assessment		Value 1. Never needed 2. Rarely needed 3. Occasionally useful 4. Regularly useful 5. Essential/ Critical	Effectiveness 0. Not used 1. Very ineffective 2. Ineffective 3. Neutral 4. Effective 5. Very effective
a	Email		
b	Voicemail		
c	Shared calendar and meeting scheduling tools		
d	Instant messaging and texting/twittering		
e	Teleconferencing for virtual meetings		
f	Web Collaboration Tools for virtual meetings (e.g. Webex, etc.)		
g	Shared electronic file storage (e.g. Network drives, SharePoint, etc.)		
h	Project/task management systems		
I	Discussion forum technology		
j	External communications with stakeholders/clients		

Worksheet: Team collaboration technology approach

Type	Start using/or improve use	Have expertise	Champion
1. Audio conferences			
2. Texting, instant messaging, chat			
3. Inter-site video conferencing			
4. Individual video conferencing			
5. Web conferencing			
6. Fax			
7. Voice mail			
8. Email			
9. Shared calendars			
10. Discussion groups			
11. Broadcasting			
12. Document and file sharing			
13. Websites and wikis			
14. Virtual team workspaces			
15. Project management			

6. Give each participant an appropriate number of colored dots to facilitate multi-voting. For example, for a team of 5 to 8 people you might provide two adhesive red colored dots (2 points each for their top two priorities) and three adhesive yellow colored yellow dots (1 point each).
7. On the prepared flip chart display the ***Worksheet 6.4: Team collaboration technology approach*** and prepare to discuss your team needs:
   - Ask the participants to place these dots in the column labeled start using (if they currently do not as a team use the tool) or improve use (if they are using the tool as a team but need to improve the tool or use of the tool) to vote so as to reflect their answer to the question: Which collaboration technology types are the best place for our team to invest to increase our capability?

   Note: Each participant may place as many votes as they wish in each type.
   - Ask each participant to add their initials in the column labeled "have expertise" if they have experience in that collaboration technology type.
8. Discuss the voting patterns with the team and agree on three to five technology types which the team is prepared to commit to build capability to help improve overall team effectiveness.
9. Ask participants to volunteer to be champions in any of these selected technology types and add their names in the column labeled "Champion". The leadership provided by a respected individual who champions the introduction of the collaboration technology is a critical success factor.
10. Break the group up into sub-groups with each team focusing on one or two of the selected technology types. If possible, include a participant with experience in that area and/or the champion for that area in the group.

11. Ask the group to develop answers to the following questions for each:
    - What specific team challenges would this technology type address?
    - Do we have a specific technology currently in this type?
        - If the team currently has access to and is using this type:
            - What is working well?
            - What is not working well?
            - Further define how use of the technology could profitably be expanded.
        - If not,
            - What specific technologies are available to us in this area?
            - Which is best suited to our needs?
            - Define how we would use this technology in our group in more detail.
12. Specify next necessary steps, owners and timing to make this happen:

    a. **Champions**: Engage the Champions to work with the appropriate leaders in the organization to sponsor use of the technology needed and/or gain appropriate approvals.
    b. **Expectations**: Set measurable goals to improve communication using collaboration technology to deliver results.
    c. **Training**: Identify the immediate and on-going training needed to support the team.
    d. **Evolution**: Share success stories and provide continuous training and resources to upgrade capability.

Virtual delivery alternative

In order to implement this activity virtually:

1. Put up the voting form as a whiteboard using a web conferencing system such as WebEx and allow all participants to annotate the displayed form.
2. Assign a different color to each participant and then have them vote up to 6 times for the technology types they think offer the most opportunity by placing an electronic check mark in the selected cell in the "Start using or improve use of" column.
3. They can also electronically add their names to the right two columns when asked to do so.
4. The team can be divided into subgroups and can then use separate teleconferencing or web conferencing sessions to answer the questions in Step 11.

14. References and Resources for Virtual Meetings

1. Building Effective Virtual and Remote Teams Handbook (eBook & Hard Copy) (2011_ VirtualeTeams (3rd Edition).
   - http://www.virtualeteams.com/vet2011/our-products-services/our-products/

2. BEST Practices for the Virtual Classroom (Copyright 2013) (eBook), Copyright J. Wagner Consulting Inc. 2013 VirtualeTEams (3rd Edition)
   - http://www.virtualeteams.com/vet2011/our-products-services/our-products/

3. Lowe's seeks to attract future workers with social tool (web article)
   - http://www.computerworld.com/s/article/9228290/Lowe_s_seeks_to_attract_future_workers_with_social_tools

4. Webinars for Dummies (complimentary eBook from ON24)
   - http://communication.on24.com/webinarsfordummies

5. 25 Activities for Increasing Interactivity in Virtual Classrooms – The Thiagi Group
   - http://www.thiagi.com/pfp/IE4H/march2011.html#LiveOnlineLearningActivity
   - http://www.thiagi.com/pfp/IE4H/march2011.html
   - www.elearningguild.com/showFile.cfm?id=4225

6. Adobe: Best Practices for Delivering Virtual Classroom Training (document and tutorials)
   - http://idt.nmu.edu/pdfs/virtclassroompractices.pdf
   - http://www.connectusers.com/tutorials/2008/08/bp_virt_class/index.php
   - http://www.connectusers.com/tutorials/2008/09/content_breakout/index.php

7. Better Beginnings: How to Capture your audience in 30 seconds by Dr. Carmen Taran (2009)
   - http://www.amazon.com/Better-Beginnings-capture-audience-seconds/dp/061524520X

8. Brain Rules by Dr John Medina (2009)
   - http://www.amazon.com/Brain-Rules-Principles-Surviving-Thriving/dp/0979777704/ref=tmm_hrd_title_0?ie=UTF8&qid=1341615637&sr=1-1

9. The Secret Formula for Online Training Presentations that Engage: by Gihan Perera
   - http://learn.gototraining.com/G2T-WP-Secret-Formula-L1?ID=70150000000YFSW&elq=01269e1d22be4d97a0e8bb671388d7ad&elqCampaignId=

10. Webex: Free account for use with up to three participants in a session (gives you access to WebEx training materials and best practices)
    - http://www.webex.com/
    - http://www.webex.com/plans/meetings-plans.html?TrackID=1029583&hbxref=http%3A%2F%2Fwww.webex.com%2F&goid=homepage_signup

11. Webinar: Interactive Training Techniques Using WebEx by Dr. Victoria Halsey, The Blanchard Companies
    - http://www.webex.com/webinars/Interactive-Training-Techniques-Using-WebEx

12. 101 Tips to motivate the online learner:
    - http://us.insynctraining.com/101-tips-to-motivate-the-online-learner/

13. A framework for the social enterprise
    - http://www.jarche.com/wp-content/uploads/2010/09/Social-Enterprise-White-Paper.pdf

15. Invitation to Submit your Best Practices

The authours invite you to share your experiences and best practices so others can benefit from your experience. We have already incorporated the wisdom of many – join the team. We will test out your practice and add to our next edition. Please submit to:

Jon Wagner and Russ Milland
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(705) 484-0888 / (289) 362-0575
info@virtualeteams.com
www.virtualeteams.com

16. VirtualeTeams – Contact Information

Jon Wagner BASc. MASc.

Jon Wagner is a pioneer in working virtually. He has been working with and researching virtual teams for over 20 years, including team workshops, online seminars, effectiveness assessments and team interventions for leadership, global and cross-cultural teams.

This began when Jon was invited to take on a leadership role for Hewlett-Packard in California and found that his son had trouble breathing due to poor air quality. He proposed, successfully, that he take on that role to a significant degree virtually, from his lakefront property in Ontario. Given that those were the days of dial-up connection, that was a challenge, but a challenge that was met successfully and built on for years. Jon has led virtual teams and worked with dozens of leadership teams.

Jon has worked in senior Human Resources, OD and Change Management roles for over 35 years. As an organization consultant he has facilitated large-scale change projects and organizational transformations at HP, Agilent, Alcan, Ontario Public Service, Oracle Clients and Loblaw.

Russ Milland BASc. MASc.

For over 40 years, Russ has worked in senior management roles with major companies such as Imperial Oil and Allied Signal's Aerospace Equipment Systems Division. He has also coached and provided consulting services to many small and medium sized businesses.

Russ has been a pioneer in the application of advanced information technologies to the transformation of businesses using cross-disciplinary teams. He has worked with a virtual, cross-disciplinary team to successfully design and implement a new, multi-billion dollar business unit.

As a consultant, he has been involved in developing web-based technologies and communications systems to reach out, develop and engage communities of stakeholders in a number of different businesses – long before the concept became the currently popular "social media" trend.

VirtualeTeams:

Visit www.virtualeteams.com

VirtualeTeams provides organizations, teams and team leaders and those who mentor, coach and consult to them with effective and efficient leading edge tools, resources and services to reach optimal levels of performance across boundaries of time, distance and culture.
Our products and services focus on virtual team leaders and team members who work across time and space. They also target the mentors, coaches, trainers, consultants, facilitators and managers who work with these virtual teams and their remote leaders and managers.

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