

## Virtual Meetings for Clarity and Momentum

### 6 GUIDELINES FOR VIRTUAL MEETINGS

1. **Don't treat virtual meetings like a poor fallback.** With practice, you can do the same things online as you do in person and some parts of collaboration work even better online. (The only activities we've found a bit clumsy to do online are some forms of prototyping.)
2. **That said, pay attention to what people have energy to do in virtual meetings versus doing "offline."** We tend to do more framing, testing, discussing, and gathering feedback in a large group, then do theming, insight development, and sense-making in small teams. We then reconvene the large group again to test and refine the emerging work. In in-person meetings, we might do all those things in the room together.
3. **Keep the meeting process as clear and simple as possible to minimize "process overhead."** This includes making any prompts or questions to the group simple and clear (always a good practice) and being mindful of what's best done within a group meeting versus between meetings.
4. **Keep the meeting technology as simple as possible to minimize "technical overhead."** This means minimizing the variety and number of technologies that participants use in a meeting.
5. **Where possible, invite written and verbal contributions at the same time.** If you're using a polling tool, share what's being contributed through the poll AND ask people to share their thinking verbally. This makes richer discussion and encourages everyone to contribute in whatever way is best for them.
6. **Make the group's thinking and ideas visible to all.** This means that when you take notes on the group's discussion or use a polling tool to collect thinking, all participants should be able to see what's captured.

### REAL AGREEMENTS FOR VIRTUAL MEETINGS

*In addition to any usual agreements your group might normally operate with, we suggest a few additional agreements for online collaboration:*

1. Please join via your computer if at all possible (it's much harder to truly collaborate by phone!)
2. Please turn on video if at all possible.
3. Be patient with the technology; we're all learning here.

### 10 PRACTICES FOR VIRTUAL MEETINGS

*Many of these practices apply to in-person meetings but are even more important for online meetings:*

1. **Clearly define the purpose and desired outcomes for each meeting.**
2. **Ensure pre-meeting communications are clear and direct,** and include meeting purpose and outcomes, meeting agenda, and any materials that will be used.
3. **Take time for check-ins (if the group members already know one another) or introductions (if anyone new has joined the group).** Do these verbally for smaller groups and via a polling tool for larger groups.
4. **Schedule breaks and stick to them.** Breaks are even more important for online collaboration, in part because people have to stay seated in fairly fixed position for long periods.
5. **Include periods of silence or meditation, especially for longer meetings.** Virtual collaboration can be busy and cognitively taxing and meditations help people calm and focus their minds. Tip: Before moving to a break in longer meetings, lead a one-minute mediation and ask people to reflect on what they most need to do on the break in order to care for themselves.
6. **Take notes on the screen that reflect the emerging thinking.** For most meetings, the notes should reflect

both the emerging consensus and decisions as well as individual comments. This is easier when participants can directly contribute their thinking through a polling tool or shared document.

7. **Have someone provide basic technical support for groups of 10 or more.** This can be as simple as inviting people to flag problems to that person via chat.
8. **Set up any asks and “prompts” before sharing proposals and information** (e.g. “Laurenly will share the proposal, then we’ll do clarifying questions, and then we’ll ask each of you to share what you like about the proposed framework and what you might add or change.”). Then do a “go around” and call on people by name to get everyone’s feedback. This is both inclusive AND keeps everyone engaged.
9. **Ask participants to identify themselves by name** more so than they would at an in-person event, (e.g. “Please say your name before sharing your comments, so we can connect your voice with your name.”).
10. **Clearly define next steps, assign tasks, and follow up immediately afterwards.** For reasons we don’t fully understand, commitments can seem more ambiguous in the virtual realm.

## OUR FAVORITE TECHNOLOGIES

- **Google Docs ([drive.google.com](https://drive.google.com)):** We often use Google Docs and Slides to present and share information in virtual meetings and to take notes that we screen share on Zoom, but they’re at their best when you invite the meeting participants to contribute directly in the docs themselves. And check out Google Jamboard ([jamboard.google.com](https://jamboard.google.com)) if you haven’t tried it yet; it’s probably the simplest virtual whiteboard online.
- **Zoom ([www.zoom.us](https://www.zoom.us))** is our go-to video conferencing solution because it seems to consistently offer the best quality video and sound. Zoom’s breakout rooms, chat, screen sharing, and recording are our favorite features but we’ve also used the simple polling and participant feedback tools too.
- **Slido ([www.slido.com](https://www.slido.com))** is our favorite group polling and thinking tool. It’s simple to administer and works well in real-time. Our favorite feature is that it automatically shows poll results on your screen when you activate a poll even if you’re running a PowerPoint presentation.
- **MeetingSphere ([www.meetingsphere.com](https://www.meetingsphere.com))** is an interesting combination of Zoom and Slido, though we prefer combining the stronger features of Zoom and Slido separately.
- **MURAL ([www.mural.co](https://www.mural.co))** is a wonderfully rich digital collaboration space with helpful templates for planning, brainstorming, evaluating, and other parts of a co-design process.
- **Procreate ([www.procreate.art](https://www.procreate.art))** is our favorite drawing app for iPad and Heather uses it for live graphic recording in virtual sessions. But you don’t have to be an artist to leverage the power of drawing in your virtual meetings because you can also “draw” using shapes in PowerPoint or Google Slides too.

## SUGGESTIONS FOR DIFFERENT GROUP SIZES

- **Groups up to 10: Mostly verbal collaboration.** Use a virtual conferencing tool (e.g. Zoom, Webex, Skype, etc.) and 1-2 shared docs. Participants might join by phone but encourage video instead. Collect meeting feedback verbally or in the shared doc.
- **Groups of 10-20: More document-based collaboration.** Use a virtual conferencing tool, shared docs, and breakout rooms to process thinking and ideas. Ask all participants to join via computer and turn on their video. Collect meeting feedback in a shared doc.
- **Groups over 20: More polling-based collaboration.** Use a virtual conferencing tool, shared docs, virtual conferencing, breakout rooms, and a good polling tool. Ask all participants to join via computer and turn on their video, though most polling tools support cell phones responses. Collect meeting feedback using the polling tool or via a follow-up survey for larger meetings. Be sure to have the facilitation team join 15 minutes prior to the meeting to test the technology, and ensure that they have a way to chat together in real-time (e.g. Slack or SMS).

**ONE MORE TIP! Hosting multi-day meetings? Turn these into a series of 3-4 hour online meetings.**

This helps keep everyone fresh and, after all, we have more flexibility about when to meet virtually, so take advantage of that to get the best of everyone’s energy in shorter, more focused sessions with work in between.