

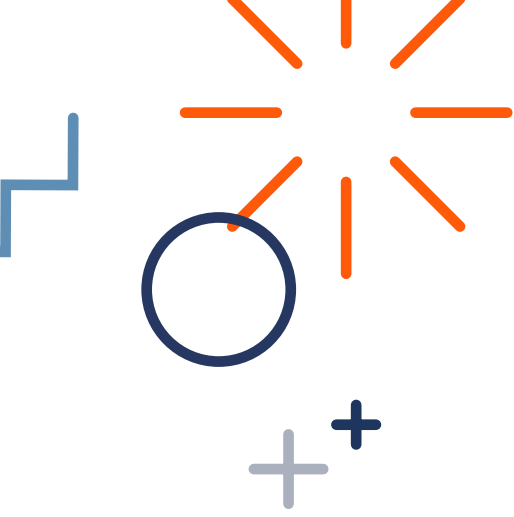


# Lights, Camera... Productivity!

**Your Guide To Better  
Virtual Meetings**



Navigate 



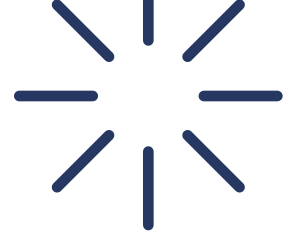
INEFFICIENT  
VIRTUAL SESSIONS  
COST BUSINESSES  
\$34 BILLION PER  
YEAR BEFORE  
COVID-19.<sup>3</sup>



There's a science and an art to the perfect virtual meeting. The science is all about getting the technical parts of the meeting right, from the pre-call meeting invitation and overview to the post-call session follow-up—and everything else in between. But even flawless execution won't save a meeting that falls flat for a myriad of other reasons related to the art of a virtual session. These are the critical nuances that generate the positive meeting vibes, flow and productivity that ensure attendees leave with actionable information instead of a bad taste in their mouths.

The COVID-19 pandemic has accelerated the existing trend toward more virtual sessions. From the end of December 2019 to the end of March 2020, daily active users on the Zoom platform increased from 10 million to 200 million daily users. Daily meeting volume for Cisco Webex more than doubled during March 2020 and user volume is up 24x during peak hours. Despite this watershed moment in the movement to virtual meetings, these impressive usage numbers belie an undeniable fact: Many of these meetings are not as productive as they should be.

In fact, productive and inefficient virtual sessions cost businesses \$34 billion per year before COVID-19.



# Why Are Virtual Sessions So Different?

At its core, a virtual session is a coming together to share, collaborate, decide and plan without being physically together. While there are some similarities to in-person meetings, it is important to identify and embrace the differences:

- It's difficult to read and interpret physical and energetic cues (tone, eye contact, body language).
- Attendees need to intentionally engage since distractions and multi-tasking are more common in virtual sessions and destroy focused attention.
- The conversation flow is slower, which means small-group work in virtual sessions is usually more productive than larger meetings.
- Presenters need to be conscious of how to utilize limited shared visual space without overloading or distracting participants.

An effective virtual session doesn't happen without intentionality and effort, and the following tips can help you take your next Zoom call up a notch.



SHARE

COLLABORATE

DECIDE

PLAN





CONTENT RULES,  
AND ABOVE  
ALL ELSE, MAKE  
ATTENDEE  
PARTICIPATION  
YOUR PRIORITY.



## Remember to C.A.R.E.

Virtual meetings have many more constraints on time, resources and attention, which means that every item on the meeting agenda must be:

- **Collaborative:** Are participants able to roll up their sleeves in real time?
- **Actionable:** Can attendees get involved or contribute to an effort?
- **Remarkable:** Will people recall a topic as noteworthy or memorable?
- **Engaging:** Will people be able to ask, rebut or follow up on a topic or update?

Keep in mind that regardless of the type of session, the tenets of a virtual meeting are the same. Content rules, so ensure the topic of focus is the primary driver (being virtual is secondary). Tailor every session and personalize it for your audience, topic and setting. Practice using the technology before you go live—this will help you present with confidence and courage. And above all else, make attendee participation your priority.



# Focus on these 7 Key Areas for Virtual Session Success

## MINDSET

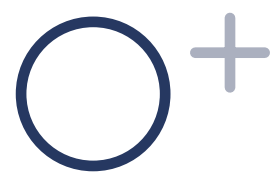
You are the conductor of a great orchestra. Your job is to make this group effort easier by helping each and every participant understand, participate and collaborate. Facilitate your way to success by helping the team move towards their desired outcome in a structured manner.



**IT'S NOT  
ABOUT YOU.**



As the facilitator, your first job is to serve your clients' needs. It's not about you. Expect three curveballs within the first three minutes, and when the meeting goes off track avoid being defensive or aggressive. It can be helpful to ask open-ended questions to keep the flow of conversation moving forward. Don't start the meeting by sharing your objectives; instead, ask the leader or individuals to share their objectives. Plant and grow supporters by finding your champions and getting them on board before and early.



## PRESENCE

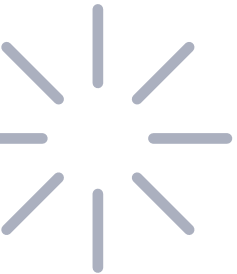
Presence starts with you and how you show up and take on your role. To conduct a C.A.R.E. session, you must ensure that different players are comfortable with the roles that they play. Through your leadership, continually elevate those who are most critical to meeting outcomes while managing those whose input may not be a part of your critical path.

Minimize redundant speaking through focused participation and contribution and start every session with an opportunity for bonding and collegiality through a creative icebreaker suited for virtual experiences. Be self-aware and conscious of your language and attitude, and make sure it aligns with all participants. It reflects on how you are perceived by participants who may not be able to see your body language.

## LOGISTICS

As Sun Tzu said, “The line between order and disorder lies in logistics.” While this sounds like a no-brainer, too many people forget to manage meeting logistics even when in person. For virtual sessions it is even more vital to drive engagement and accountability with attendees.

Send a reminder for attendees and confirm who will be in each session. Create an agenda for the meeting, and most importantly, stick to it. Keep your face in the middle of the screen and avoid having natural or artificial light behind you. It’s also a good idea to keep your hands in view so other participants see you as



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-SUN TZU



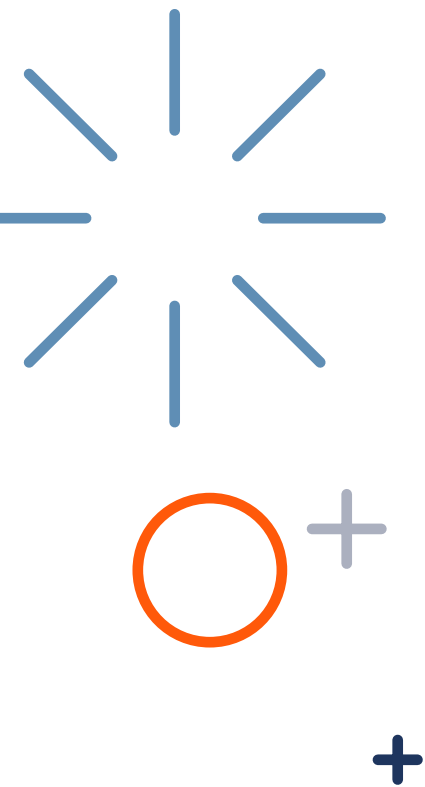
engaged (and not scrolling through your social feeds). And finally, don't learn the meeting platform technology on the day of the event—come trained and prepared.

## ROLES

Compared to in-person meetings that thrive on person-to-person interactions, it can be easy to hide in a virtual session. Having too many participants, an overly talkative leader or undefined participant expectations will exacerbate this tendency. Additionally, failure to establish roles and corresponding responsibilities will make a session less impactful and outcome-oriented. Establish roles up front and ensure participants are clear on expectations. Roles include:

- **Facilitator:** The main communicator who drives the agenda and creates space for engagement.
- **Designer:** Brainstorms and then designs a structure so it creatively and effectively meets the needs of the session.
- **Champion:** The participant who is prepped to help support the effort.
- **Logistics Guru and Tech Expert:** The ninja behind the scenes who ensures all goes as smoothly as possible.

For one-on-one meetings, one person will probably play all roles but it is still important to cover all roles. In larger group meetings, rely on colleagues to come in and fill roles if needed.



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## OUTCOME ACCOUNTABILITY

At the end of a virtual session, it is necessary to be explicit about what comes next. Ensure that all attendees hear and agree to ownership and planned next steps assigned in a session.

Go through your action-item list and identify responsibilities and target dates, then put it in writing and send it out to all the attendees.

It's normal to be exhausted at the end of hosting a virtual session, but don't let the energy wane as you wrap things up. It's like having 100 meters left to run in a 5K race—make them count!







DESIGN YOUR VIRTUAL  
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INTENTION

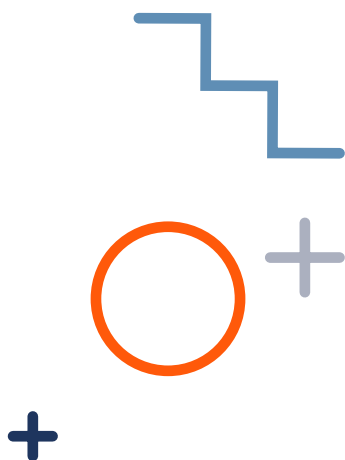
## TAKING ACTION

The phenomenon of meeting for meeting's sake happens all of the time. Virtual sessions make ineffective, non-critical meetings even more apparent, so it's important to get your teams active and engaged during these sessions.

Design your virtual sessions with intention, which means leveraging tools and colleagues to create a session with a variety of ways to meet the target outcomes. Call out the person's name before asking a question, ask your question and then repeat their name. Acknowledge that you will be posing and engaging in a circular manner; for instance, go around the "Brady Bunch" screen and call on people in that order. Warm up with an icebreaker to make sure that everyone contributes from the start, and make this the expectation for the rest of the session.



# Guidelines for Creating a Welcoming Virtual Environment for Every Attendee



THE SEEMINGLY  
“LITTLE” THINGS IN  
A VIRTUAL SESSION  
ARE ACTUALLY NOT  
THAT LITTLE AT ALL..

The seemingly “little” things in a virtual session are actually not that little at all. They can make or break your success, so it’s important to recognize and optimize the following key components of your meeting.

## STRONG LIGHTING AND POSITION

You are hopefully not trying to hide your identity like a whistleblower interviewing on 60 Minutes or 20/20—so the ambient lighting and body position during your virtual session should not give that impression. Strive to make these best practices your own:

- Test out your experience before your meeting starts.
- What you see in your room is not always what you’ll get on camera.
- For your layout, try to go from mid-torso to the top of your head without cutting off the top of your head.
- Position the lighting source in front of you to ensure that your face is well lit and visible.



- Try to position the camera in a top-down angle, rather than a bottom-up. It will create a stronger presence for you and a better experience for your attendees.
- Do not put bright light sources behind you, including windows, lights or the glowing ball of gas we call the sun so that you do not look like a talking shadow.

## AUDIO IS YOUR ALLY

Audio is the common link that holds any meeting together—without it, you don't have a meeting, you have a silent picture show. Be aware of background noise, sidebar conversations and off-the-cuff comments that you thought were behind the scenes.

If ever in doubt ... MUTE YOUR AUDIO.

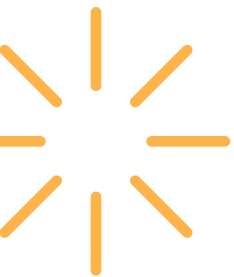


Also, if you're logged in on multiple devices, don't forget to mute the audio (both speaker AND microphone) to ensure that you do not create an echo.

## USE BACKGROUNDS CREATIVELY AND APPROPRIATELY

Backgrounds can be an engaging way to mix up a virtual session, but they require good judgment. Like telling a joke successfully, you have to pick the right time and know your audience.





Virtual backgrounds can work for theme-based meetings, team socials and recurring sessions where you have deep personal connections and trust. Appropriate images include backgrounds that represent the corporate image, your personal brand, pop culture, art and landmarks. As with any setting in polite society, avoid backgrounds that reference politics, religion and money.

## REAL-TIME WHITEBOARDING

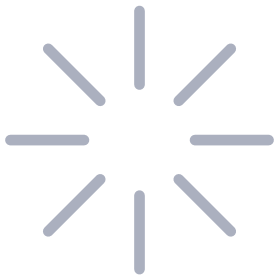
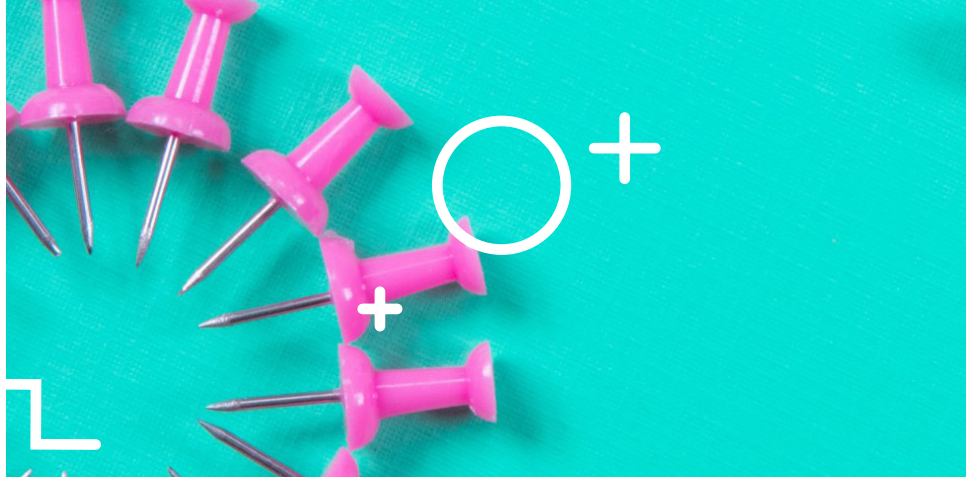
Attendees need a place to not only focus their attention, but they need a space to collaborate together. Real-time whiteboarding can help arrange information in a way that supports brainstorming, comprehension and clarity.



### WHITEBOARDING TOOLS ALLOW YOU TO:

- Sketch out a concept.
- Jot down a bunch of ideas on post-it notes and then easily do some affinity mapping.
- Support an icebreaker or energizer activity while bringing levity and creativity.
- Update components of a process in real time with ease and flexibility.
- Document the conversation, insights or decisions.





## 1-2-4-ALL

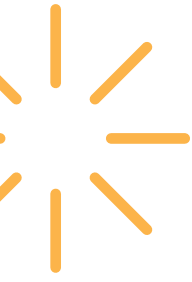
1-2-4-All is a go-to facilitation method that engages every participant while simultaneously generating valuable insights.

The sequence of steps and timing:

- **1:** Silent self-reflection by every participant on the challenge posed to the group; jot down ideas on post-it notes.
- **2:** Pair up to share ideas with a partner, building off each other's ideas; choose the best.
- **4:** Team up with another pair (group of 4), share best ideas, notice similarities and differences and continue building on each others' ideas.
- **All:** Bring everyone back to the big group and have people share out "popcorn" style (just pop out with ideas because it is faster and capture ideas in a shared and visible document); encourage at least the best idea from each group.

### **Clearly describe the activity process at the beginning:**

We're going to start alone, then working in pairs, then in foursomes, and then as a whole group. Use breakout rooms and give participants one-minute warnings before transitions.



# Hitting Curveballs Out of the Park

The unexpected is bound to happen during every virtual session. Have a cascading plan as guidance so you can mitigate the problem while continuing to move forward.

## **PROBLEM: AN ATTENDEE IS STRUGGLING TO CONNECT OR HAS BACKGROUND NOISE.**

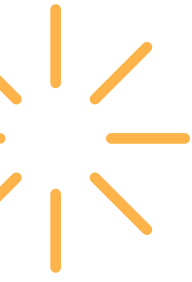
→ Put everyone on mute → Invite the person to join with over the phone → Call them from your phone so they can hear audio → Set them free and chat with them later



## **PROBLEM: A TOUGH CONVERSATION HAS ERUPTED.**

→ Acknowledge and appreciate → Confirm the focus and ensure it fits with session objectives → Offer to continue to explore in large group or move to private line → Continue with respect, curiosity, and a problem-solving mindset





# Above All Else, Remember to Be Human

Hosting and running productive virtual sessions is a new skill for many people that requires developing some technical expertise and creative ways to drive engagement. Keep in mind that the “virtual” part of the meeting can be dehumanizing and frankly exhausting, because it forces us to interact with each other in unnatural ways. Dogs will bark, kids will make cameos and things will go wrong during your session—but if you keep your humanity, kindness and sense of humor, you’ll find ways to harvest nuggets of productivity in every virtual meeting your organization runs.



## ABOUT NAVIGATE

Management consulting, done differently. At Navigate, we tackle pressing problems for large and complex companies. Our work goes well beyond strategy. We’re hardwired to deliver measurable, sustainable impact by focusing on what ultimately drives business performance: the way people work together.

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