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Faith Thomas

Dec 20, 2010

5 Tips for Conducting a Virtual Meeting

Conducting a successful virtual meeting requires preparation and a new set of etiquette rules.



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robots from the comfort of our homes, increasingly our daily interactions are conducted through virtual means.

As a cost-effective method to achieve a goal and attend conferences, it's important to know when to trade for bottom-line savings. While virtual meetings may replace the need for entrepreneurs, the convenience can serve to enhance your business's productivity. However, virtual meetings aren't ideal for every situation, so knowing when and how to utilize this technology is vital.

Donna Dennis, president of Leadership Solutions Consulting, and creator and facilitator of [American Management Association's](#) three-day seminar on [Leading Virtual and Remote Teams](#), says that technology became the main focus; somewhere between people's BlackBerries and e-mail, many leaders lost sight of relationships. "Now the focus is on managing task, relationships, and technology," says Dennis, who elaborates further in her upcoming book *Knowledge Management and E-Learning*.

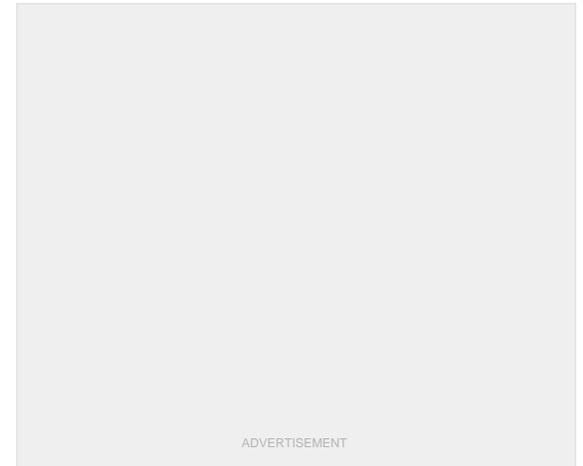
Lee E. Miller, influencing trainer and author of *UP: Influence, Power and the U Perspective: The Art of Getting What You Want*, adds, "The biggest mistake people

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make is assuming that influencing when you are meeting face to face is the same as influencing when you are interacting virtually. It's not. The rules are different because people respond differently when they are interacting virtually."

Here are some tips to help you conduct a successful virtual meeting.

5 Tips for Conducting a Virtual Meeting: How to Prepare

"The first thing we do before deciding what technologies and software will be needed is to decide who the participating audience is and what information is being shared," says Drew Bowers, a research psychologist in the University of Dayton Research Institute's Human Factors Group. "We have found that it is best for presenters to either design their data or presentation according to the environment they will be presenting in, or to choose the best environment to represent the data they have." Bowers says, "You can't simply take a presentation you gave in front of a live audience at a conference and throw it up on a video monitor for a virtual audience and expect the same results, because you're limited, to a degree, in how you can interact with your virtual audience.

Dennis points out that when you schedule a meeting in a physical location, you can be more casual about the meeting's agenda and providing materials. You also have the advantage of getting attendees up to speed in the hallway, at the coffee machine, etc. However, a successful virtual meeting requires a lot more upfront preparation. Colaric recommends that virtual meetings be planned out well in advance. "Send the agenda ahead of time, create visuals to reinforce your message and forward them to everyone before the meeting, invite the members of each team who need to be involved," she says.

Also, make sure to send log-in information (access codes, URLs, and call-in numbers) at least a day in advance so that participants can test for any software downloads needed. You may also want to ask participants to log in at least 15 minutes prior to the start to test connectivity, suggests Laura Stack, author and president of The Productivity Pro, a time-management training firm. "Conduct roll call and verify that everything is working. Review the timeline. Give out a method to reach you offline should a panelist encounter problems, says Stack.

Note: If you are hosting a single presenter with a large audience tuning in, then it is a good idea to have a facilitator designated to assist the main presenter. The facilitator can support participants with technical issues as well as monitor any chat questions that come in. Having the presenter try to read chat questions slows down the flow of the presentation.

Dig Deeper: iMeet's New Videoconference Tool

5 Tips for Conducting a Virtual Meeting: Technical Tools and Requirements

The beauty of online meeting technology is that even the most fledgling, bare bones operation, can use it. All that's required is an Internet connection, audio (from computer speakers, microphone, or via telephone), and a webcam (standalone or integrated with your monitor/laptop). Larger groups may also need a projection screen or large TV monitor.

When choosing a service think "small," says Susan Colaric, assistant vice president for Instructional Technology at Saint Leo University in Saint Leo, Florida. "The most effective web conferences are those that only use the technology that is needed. KIS—

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keep it simple— is the best way to have people focus on your message and not the technology." Some online web products include [Adobe Acrobat Connect](#), [GoToMeeting](#), [Microsoft Office Live Meeting](#) and [WebEx](#).

Entrepreneurs also need to be mindful that not every video conferencing system will work together. Avoid the embarrassment of delays and technical glitches by testing the connectivity of all sites before the meeting. "Trying to use an analog video system at one end and a digital system on the other can cause a multitude of problems, and even digital-to-digital conferencing can be problematic if an older software program needs an upgrade before it can 'talk to' a newer program," says Bowers.

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[fluxappeal1](#) · April 29, 2011 at 5:37pm

I've read so many articles lately touting the cost and time-saving benefits virtual events with little real data on how to effectively gauge their success. This article is one of the few that actually addresses that it IS different than face to face, and that the methods of reaching your specific goal need to be different as well. I don't agree that it's archaic to point out the limitations of any particular medium, if one doesn't now the limitations, they can't possibly address how to minimize them. Thank you for an informative article.

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[Brett](#) · January 6, 2011 at 6:31am

Great points; One of the other preparation points to consider is to make sure that you understand the features of your virtual conference systems. The moderator should know how to quickly identify and mute someone if they put the meeting on hold music or have a lot of background noise when someone else is speaking.

[LessMeeting.com](#)

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[Paul Hart](#) · December 24, 2010 at 5:15pm

It's a mistake to think that you are limited in a virtual environment: it's a different-but-not-inferior medium. I consider this attitude to be archaic. You can't rely on body language, etc., but there are interactive tools you can use online that are not available in a F2F situation, such as annotation tools, anonymous chat, and control over who is speaking (integrated mute/unmute). We really need to move beyond our face-to-face mindsets that virtual environments are somehow 'limiting'. It's like saying email isn't as good as the telephone, or a screwdriver isn't as good as a hammer. They're different, and that's all.

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[Remote Worker](#) · December 23, 2010 at 3:44pm

Great article, its easy to become too laid back or even borderline unprofessional in a virtual meeting.

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