

[Home](#)

Dear Reader,

Budget restrictions and environmental concerns that motivate us to lower our CO2 footprint are among the main reasons why more and more meetings are being held virtually. But the move from a face-to-face meeting to a virtual session has many logistical complications, and it is not easy to achieve comparable effectiveness in a virtual meeting.

What are we learning about how to run effective, exciting and engaging virtual meetings? To find answers to this question, I conducted a “virtual interview” myself, with Ernie Turner, President of LIM LLC, Ruby Palma, LIM Director for the Philippines, Eras Lodhi, with LIM India, Joy Wang, Astra Zeneca’s Asia Pacific Talent & Leadership Development Lead, Anna Ordinario, Asia Pacific Clinical Quality and Training Manager, and Choy Kiew Ho, Director of the Program Management & Strategy for AstraZeneca Asia & Emerging Markets R&D.

Isabel Rimanoczy  
Editor

# LIM News

# Virtual Meetings

Issue 147

[Share](#)

November 2012

## Virtual Meetings

### ***LIM News: Why are virtual meetings challenging?***

Ernie Turner: There are several reasons. When people on a conference call are invisible to one another (meaning there is only an audio connection) there is a huge temptation for participants to double task. They can, unseen by others, work on emails, cook, drive, snooze, read, look after the kids, etc., and as a consequence we not only miss key messages, but also the ambience and bonding that are characteristics of good face-to-face meetings..

There are restrictions even when we use video conferencing, because the set up tends to be rather 'formal' with an extended 'board room' feel. This takes away the power of an informal meeting and puts extra responsibility on the meeting manager to overcome this barrier to get people connected at a personal level so they can fully dive into the content of the meeting.

***LIM News: What are the complaints you hear from participants in virtual meetings?***

ET: People say virtual meetings tend to be “very dry”; and poorly planned. They are not as engaging as regular meetings, and very often have to confront technology hurdles such as poor sound, loss of video, and sound delays. These can all make for a lack of personal connection., and, as I said before, all these circumstances make it conducive for people to ‘double task’-- to compensate for their the lack of engagement by doing something “more useful” with their time.

***LIM News: So what can make a virtual meeting effective?***

ET: There are several things that can be done. These include: careful planning; having a few people co-design the meeting; raising expectations in advance so everyone is clear on who will attend; clarifying ‘why are we meeting?’ (what the purpose and outcomes are); ‘how will we spend the time?’ (clear agenda); and also ensure the meeting ends with a summary and clear next steps, plus a debrief to capture insights.

***LIM News: That sounds like the basic checklist for a regular face-to-face meeting!***

ET: Yes, it’s true, but as important as these points are for a regular meeting, they become much more important in a virtual one. So to compensate for the lack of physical visibility, the set up should be as informal as possible, allowing the individuals to make a personal connection. For example, ensure everyone knows everybody else, make introductions, conduct a brief check in (for example, ‘What has been a memorable moment in the last 24 hours?’), and finally a quick overview of the meeting using the driving questions I just mentioned.

***LIM News: This question is for you, Ruby. Do people need training to run a good virtual meeting?***

Ruby Palma: Definitely! To chair a virtual meeting is very different than a regular meeting. For example, assertive facilitation is important, while this is not necessarily so key in a face-to-face meeting, where people connect through their body language in addition to their voices. But when you can hear only voices, and people speak one at a time, the whole scene can become very confusing and disturbing for the participants unless there is a facilitator/leader who conducts the meeting in a more assertive way than at a normal meeting. Also time keeping is essential, even more so than in a face-to-face meeting, because frequently there are meeting participants in different time zones, who are having to sacrifice family or sleep time!

***LIM News: What do meeting conveners need to do?***

RP: To begin with, they need to assign a technical person to manage the “hard” aspects of the meeting. To ensure a smooth meeting someone needs to anticipate and take care of all requirements-- which is not much anyway!. The key ones are: a good Internet connection; testing the audio (from computer speakers, microphone, or via telephone); and a webcam (standalone or integrated with the monitor/laptop). Testing the equipment and connectivity of all sites before the meeting is very important, to avoid the embarrassment of delays and disturbing technical glitches. The log-in information (access codes, URLs, and call-in numbers, also exchanging information to reach each other offline) should be sent out at least a day in advance so that participants can test for any software downloads needed. It is also useful to ask participants to log in at least 15 minutes prior to the start to test connectivity. In case there is a larger group at a single location, a large TV monitor or projection screen is advisable, allowing people to gather in one meeting room. Larger groups may also need a projection screen or large TV monitor.

***LIM News: What advice do you have for the meeting leaders?***

RP: In my experience, a successful virtual meeting requires a lot more upfront preparation. Virtual meetings have to be planned out well in advance. After defining the purpose and who needs to be there, as in a face to face meeting the leader or chairperson needs to decide what information will be shared. But here is the important nuance. Anything that could be dealt with in a written exchange should be avoided. In a virtual meeting we risk losing the focus and attention of the participants.

It is also important to send the agenda ahead of time, be clear about timelines so everyone can be prepared, and create visuals to reinforce the message. Even though we can't see each other, we can still make the meeting somehow 'audio-visual' and should use that opportunity.

It is essential to be very clear when we speak, and even repeating main points is important, because the speaker has no way of receiving visual feedback from the audience that s/he has been understood. It therefore is helpful for the speaker to constantly check for understanding among participants.

I also recommend having a facilitator designated to assist the main presenter, so that s/he can support the participants with technical issues, as well as monitor any chat questions that come in. You want to create a sense of "real" meeting as much as possible.

***LIM News: How do you create this sense of "real" meeting?***

RP: One of the techniques introduced by Ernie is to have all the participants draw a circle on a piece of paper, and to assign names based on a clock-face. For example: 12 o'clock is Ernie, 1 o'clock is Jim, 2 o'clock is Carry etc. That way we all get the feeling of being around a table, and we know where we're sitting, and next to whom. It makes it also easier to hear everyone, using this sequence to 'go around the room'.

***LIM News: That sounds fun and different! And for participants? How can they contribute to make it a good experience?***

RP: Key examples are: agreeing to norms to be observed during the meeting that can make it a good experience; making sure their equipment is tested and working; and taking care to mute themselves when they are not presenting so as to avoid noise. Also since we cannot use "non-verbal cues", participants need to be accountable and ask when they don't understand or are not clear about something. Everyone is responsible for making this a good meeting.

***LIM News: So let's go around this virtual interview table to Eras Lodhi, a LIM Coach in Bangalore. Eras, can you give us an example of an engaging virtual meeting?***

Eras Lodhi: The one example which comes to mind immediately is the AstraZeneca (almost) virtual workshop that we recently ran. And one reason why I thought it was engaging was because everyone was involved and every sub-team had its deliverables for the virtual part of the meeting. People were engaged with their heart and mind.

And I value this particularly because there have been some virtual meetings where I, as a participant, have either switched off mentally and started playing games on my PC or switched off physically and gone to sleep. This happened when I thought the meeting had lost focus of the agenda or was going around in circles or was just way too dull.

***LIM News: You were a part of the organizing team in that successful virtual session. How did you help to make this happen?***

EL: My contribution was in two areas: a detailed planning to ensure that we were on track in terms of time and deliverables (mine and the team's) and to ensure that at

all times the participants knew why they were there and how it would help them. I was linking the "here and now" with the larger context of the workshop.

***LIM News: In retrospect, what are some things you would do differently next time?***

EL: In the AstraZeneca workshop sometimes I got the sense that I was hustling people through certain areas to ensure that we met the timeline. So better time management would be one. Another thing that I want to do better is my facilitation - at times I think I came across as forceful instead of being more 'fluid' but still meeting the goal. This takes a lot of practice, especially in virtual settings with cross-cultural diversity in the audience! We all need to get better at balancing assertiveness and flow.

***LIM News: Thank you, Eras. Now let me move to the next person at our table, Joy Wang, Astra Zeneca's Asia Pacific Talent & Leadership Development Lead, who participated in the session Eras was referring to. Joy, what lessons did you extract from this experience?***

Joy Wang: What I have learnt from this learning experience was, as it was said before, the importance of getting well prepared for a virtual meeting, and I'm particularly referring to applying ARL principles and tools. We used the 4MAT<sup>[1]</sup> and Five Dimensions<sup>[2]</sup> to organize the thinking and set the plan. Indeed this is important for all kinds of meetings. But the entire planning team, with support from the LIM Coaches, we held several virtual planning meetings to clarify objectives, agree on the way of working and plan for every single detail. I must say the planning process was a nice and engaging experience for me.

Then, I also learned the value of engaging virtual meeting participants by using ARL tools – small tools like the virtual clock seating, SRWR<sup>[3]</sup> to collect everyone's thoughts/feedbacks, having a meeting manager to facilitate the meetings and an experienced team coach to be the local facilitator at each location. These were all key factors to make the meeting successful. I personally benefitted a lot from the learning journey!

***LIM News: Thank you Joy. Now I'd like to hear Anna Ordinario, Asia Pacific Clinical Quality and Training Manager, also with AstraZeneca. Anna, what were the specific learning outcomes that you had in mind as you were thinking of the design?***

Anna Ordinario: What was unique with this session was that we did not exactly start planning from specific set objectives, but we started planning because we had an opportunity for a learning session, it was to be a half-day session and a virtual session! This precisely is what inspired the learning outcomes, what would leaders do when given this great opportunity to connect through a learning session? So the learning outcomes that I had in mind were:

- \* Connecting leaders to collaborate to reach the company's business goals
- \* Connecting leaders to work together on a specific challenge posed by our senior leadership team;
- \* Supporting each other in our individual personal or team challenges

***LIM News: What is your plan to follow up on this virtual meeting so that the learning seeds grow?***

AO: We were able to run an Open Space<sup>[4]</sup> during the session and this generated very powerful plans submitted by small groups. A small working group has been formed to take all these plans as inputs into a project to develop a learning and coaching culture within Asia R&D. We are also exploring different platforms to hone the networks started or renewed during the session, so that leaders have a real network to give and get support

**LIM News: Anna, what are two lessons that you took away from this experience?**

AO: My two take aways are:

\* There are always opportunities amidst challenges – we were challenged by budget constraints and yet we were able to show that a cross-functional, virtual session among leaders in Asia R&D is not only possible, but can be very successfully done.

\* Courage to try out new things and step out of the ‘normal’, use creativity and collaboration – these are our core values, and these are truly needed to be able to succeed in a rapidly changing, and challenging business environment.

**LIM News: Thank you Anna! And now let me turn to Choy Kiew Ho, Director of the Program Management & Strategy for AstraZeneca Asia & Emerging Markets R&D . Choy Kiew, what were the critical success factors for you?**

Choy Kiew: I think the success was due to the availability of strong, confident and capable leaders in each location who have the same passion and drive to succeed. Also, we were able to understand the needs and gaps in the various functions and geographies – so that the right program was designed that met the expectations of all.

Certainly, it was important that we were all clear about the short- medium- and long-term goals and outcomes, which were in alignment with the overall organizational goals in developing people and the organization. And last but not least, a positive and strong relationship with Ernie, Ruby, Eras (and other team LIM team members too) that has been built and developed over the years.

**LIM News: What were your lessons learned?**

CK: Dare to dream and make sure you share your dream with others. You will realize that there are many others who have similar dreams too. And these are the colleagues who will be key in making that dream a reality. Another lesson was that there are no boundaries when it comes to learning and development. It’s really up to each individual to take the first step – as we own our own development – not HR, nor our line managers, nor our leaders. We can attend a multitude of training, development and leadership courses but in the end, we choose how we develop and grow. And that to me is the essence of a lifetime of learning.

LIM News: Thank you all!

---

<sup>[1]</sup> 4MAT is a process developed by Bernice McCarthy. It uses four questions to frame a topic: What is it? Why is it important? How will we do it/how does it work? So What (applications and implications)

<sup>[2]</sup> Five Dimensions is a systemic template developed by LIM LLC. It includes the Personal, Professional, Team, Organizational and Business dimension.

<sup>[3]</sup> SRWR: Stop Reflect Write Report, a process to give everyone a chance to collect their thoughts in silence before sharing

<sup>[4]</sup> Open Space is a meeting process that allows individuals self-arrange by topics of interest. See [openspaceworld.org](http://openspaceworld.org)



LIM News is published by LIM LLC  
Editor: Isabel Rimanoczy  
Editing Support: Tony Pearson  
E-mail: [newsletter@LIMglobal.net](mailto:newsletter@LIMglobal.net)  
<http://www.LIMglobal.net>

**ARL - Action Reflection Learning<sup>®</sup> and Earning While Learning<sup>®</sup>  
are registered trademarks, owned by LIM LLC.  
Copyright © 2012 LIM LLC. All rights reserved.**