

# Better Online Meetings

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Edition 1 – March 2020

## Contents

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<b>Introduction</b>	<b>1</b>
<b>1 Guidance for Meeting Hosts</b>	<b>1</b>
1.1 Before	1
1.2 During	3
1.3 After	1
<b>2 Guidance to send to participants for bigger meetings</b>	<b>2</b>
2.1 Invitation	2
2.2 Before – guidance to help you prepare	2
2.3 During - guidance to help you take part	2
2.4 After - knowing what to expect	3
<b>3 Online multi-stakeholder dialogue and consensus building</b>	<b>4</b>
<b>Annex 1 Conference Call Bingo</b>	<b>5</b>
<b>Annex 2 Hand Signals Conventions</b>	<b>5</b>
<b>Annex 3 On-screen body language – sending the right signals</b>	<b>6</b>
<b>Annex 4 Suggested feedback form for bigger meetings</b>	<b>7</b>

### Message of encouragement and hope from Dialogue Matters

As a team and individually we are passionate about helping the environment sector maintain some momentum online. We hope this helps you catalyse the conversations and action that will result in a kinder, greener and fairer world the other side of all this. We have put together this guidance note at speed to help you do that.

There is, after all, a nature and climate emergency as well as a pandemic, and there is no time to waste. Our response has been to fast track Dialogue Matters Online – something we had bumbling along in the background.

This is indeed a scary and tragic time. But from our work we know some of the greatest transformations are birthed in the most difficult situations. That's because times of disruption open up new ideas and new possibilities and shock us out of complacency or the idea that the way we do things is the only way that they can be done.

So if we put our minds and hearts to it, we can come out of this with surprising new ideas, a better way of living and a much brighter future for our precious world.

With thanks to Joel, Chloe, Ross, Lena, Kathryn and of course Jem. You have all been incredible in your determination, innovation and passion to help. Thank you. Diana

**This content is from our combined experience and knowledge and is our shared IP (apart from the conference call bingo in Annex 1!) But this PDF is free to share with all and sundry**

## Introduction

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**The focus of this guidance is the kind of meetings you normally run with your team or project partners.**

**There is plenty of guidance for running online meeting, but these are the pearls of wisdom of professional facilitators who factor in the human dynamic - so it includes some tips and thoughts you are unlikely to find anywhere else.**

**We have written this to be helpful whatever platform you use, but our main experience is with Zoom which may have influenced our thinking**

**We hope you find this useful. This is most definitely Edition 1 - so please do send us suggestions for how we can add to and improve on it.**

**Complex multi-stakeholder workshops, collaboration and consensus building are beyond the scope of this short guidance note. Doing this online brings fresh challenges and opportunities. We know we are at the leading edge of innovating how so we have included a short section to inspire you that it's possible.**

## 1 Guidance for Meeting Hosts

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### 1.1 Before

Just like any productive face to face meetings, doing meetings online takes a bit of preparation.

#### 1. Choosing your platform

- When choosing your online meeting platform, it is worth checking and comparing what bandwidth each runs on. We find a benefit of Zoom is that it runs at a lower bandwidth than Skype. This matters if you are connecting with people who don't have good internet connections.
- .Some platforms require all participants to download an app and set up a username to connect (e.g. Skype). For others, you can set up a one-off 'meeting room' online, and people join the meeting by clicking a link you send round (we know zoom has this function). As the host, it is best you download the full app – accessing through online portals can mean you lose some of the platform's functionality.
- Some platforms offer more functionality than others in terms of break out options, white boards and other tools. Think about your face to face meetings and find a platform that provides for those needs.

#### 2. Tech/equipment for participants

- If each participant is dialling in from a computer or laptop, everyone needs a microphone or headset and preferably a camera/web-cam capable of video.
- If dialling in from a mobile, most smartphones have the necessary tech build in – but on a small screen it is harder for people to stay engaged and focused for long and not have full functionality
- Try to keep technology requirements to a minimum – less is more when it comes to online meetings!

#### 3. Familiarise yourself with the tech

- Familiarise yourself with the platform you are using for a short time in advance and if possible practice with a few colleagues.
- Make sure you have a good microphone and video recorder.

#### 4. Connecting

- Run a tech session the day before the first meeting so people can connect up and sort out any glitches – there will undoubtedly be some! You don't want these kind of issues interrupting the meeting, so best to get them straightened out beforehand.
- Open meetings 10-15 minutes before your formal start. This gives people the opportunity to deal with any last minute tech glitches. This time is also for informal greetings, catch-ups, and chat - just as if it was face to face.
- Not everyone will have good internet connections so you may find some loose connection and 'drop out' of the meeting. Some platforms auto reconnect them, but it can be disruptive and the participant can miss parts of the meeting. The alternative is to ask the participant to turn off their video function, as it uses less internet data to just support sound, - but then you lose the face to face benefits.

#### 5. Guidance to give participants

- Tell participants what platform you are using and how to make an account/join the meeting online.
- Send them a screenshot of the basic meeting screen, flagging where useful buttons are. It's true that most platforms are fairly intuitive but the 'techy-anxious' can get flustered, so help them in advance.
- Send out the meeting Agenda so participants are aware of meeting length, breaks, and discussion focus. This can help them prepare too - especially necessary when working from home.
- See section **Error! Reference source not found.** in this document for some useful advice to send them in advance – we also have a word version so you can tailor it to your needs.

#### 6. Being inclusive

- Consider if some of those you want to involve have particular needs: hearing, sight, the inability to sit for long periods of time, inability to spend a long time looking at a screen, or dyslexia. We don't yet have all the solutions but thinking about them may help you provide for them – we welcome any suggestions we can include in the next version of this note.

#### 7. Plan and structure your meetings

- Online meetings have to be faster and more focused – an hour is comfortable, and 3 hours the absolute max but needs shifts in pace, plenary and break out, and several breaks.
- Don't be ambitious with whiteboards, breakouts and other features to begin with. With practice these can be useful tools, but simple is better when you are starting out.
- Plan to keep any presentations or 'talking at people' sections as short as you can – it is much harder for the participants to concentrate online. Also plan what to say in advance to avoid rambling.
- Hand over to other people to host/lead discussion on particular topics
- Plan 5 minute breaks about every hour – even if you wouldn't break a 2 hour meeting face to face, you need to online. This can be just to stretch, get a glass of water, stare out the window at some greenery (proven to restore concentration - one of our associate did the first research that proved it!)
- A facilitation tactic you can use is to structure the discussion by questions (not topic). This encourages 'parallel thinking' (Ref De Bono) and can increase efficiency by ten times. If you do sequence questions this way, allow a maximum of 10 minutes to respond to each question and invite short and focused responses (this stops any rambling, reduces dominance, and helps group collaboration). For example to consider a proposal ask:
  1. What are the positives of this?
  2. What are the challenges?
  3. Any new ideas/solutions to overcome challenges and enhance positives?
  4. Any different ways we could achieve the same outcome?

5. How do we move this forward?

6. Who is doing what and when to make that happen?

- If you want input on particular topics or questions, consider sending them in advance. The advantage is people come prepared. The disadvantage is they may have already closed their mind and adopted a particular position before hearing others perspectives.

#### 8. Work out protocols for how people flag they want to speak

- If as the host puts you want to put people on mute, you need to work out how they tell you they want to speak. For example in Zoom:
  - They can use the 'chat' function to send a typed message, either to the whole group, or just to the 'host'/facilitator.
  - They can click on 'Participants' in the action bar at the bottom of the zoom window. A menu will open on the right hand side of the screen. At the bottom of this menu they will see the option to 'Raise your hand.' Tell them to click this, and it will alert you they have something to say.
  - If it is appropriate for participants to jump in and comment verbally, they can unmute themselves by clicking the 'unmute' button, or, at least in some packages, holding the space bar while they speak to temporarily switch their mic back on.

#### 9. Team for delivery of bigger more interactive meetings

- We suggest you have a team to deliver bigger workshops:
  - The main host/chair/facilitator
  - A support person who can help you and participants
  - A note taker with microphone on mute

## 1.2 During

### 1. Getting started

- With introductions do what you would do in face to face meetings depending on group size:
  - Small group: do a quick icebreaker activity and/or ask each participant to do a quick introduction. In face to face meetings you might be used to saying "let's go around the table to introduce ourselves", but online, the meeting host needs to invite each person by name to say who they are.
  - Big meetings: simply introduce yourself and perhaps outline what teams are involved in the meeting. With people's permission you can agree to share emails after the session if necessary.
- Outline the agenda, break times and end time.
- Put everyone at ease saying we are all novices and learning fast and so let's not worry when we get hiccups. It can be a little awkward and clunky to begin with, but encourage everyone to embrace it as a challenge! To keep it really light you could use online meeting bingo! See Annex 1
- While working as a large group in a single zoom call, it is best that all participants mute themselves to avoid too much background noise. Ask participants to do so in your introduction.

### 2. Giving talks/presentations

- Ask everyone to check they are on mute.
- Keep these short and friendly.
- Try to look directly at the camera, rather than people's faces on-screen when you are talking – this way you'll be making virtual eye contact rather than looking down at a screen where you feel you are making eye contact but aren't. This takes some practice.
- Ask participants to write questions or comments in the chat box or bar -this also helps them stay engaged

### 3. Work out the protocol for when people want to interject

- To indicate people want to talk they can:
- Use a tool on the platform to notify you when they would like to interject (e.g. 'Raise your hand' function on Zoom)
- Use the conventions for hand signals - see the Annex 2

### 4. Taking notes/minutes

- Typing notes can be too noisy! We suggest the note taker is on mutes throughout the meeting.
- Live and visible notes can be helpful. The two most straightforward options are:
  - Screen share using a word doc, but screen share dominates the screen and limits people's ability to see each other.
  - A google doc visible alongside the video.

### 5. Handling challenging meeting behaviour

- Agree some guidelines for online working with the group at the start of the meeting. You can either create a list beforehand, or suggest that other participants put ideas forward. E.g:
  - Only speak one at a time (Online this is a technical issue, as well as good meeting protocol. That's because most platforms will try to cancel competing noises so no one hears anything!)
  - Do your best to engage
  - Don't do other work at the same time
  - Keep on topic – and "Park things" that are taking us off track to come back to later
  - Mobiles off (other than the tech support who needs theirs on vibrate ready to respond if people have technical issues)
- If participants are not keeping to these guidelines in politely remind them of their agreement.
- If a few people are dominating the discussion say "lets hear from someone who hasn't' spoken so far?" or "Are there any other perspectives".
- If people get heated, rude or aggressive use your interpersonal skill to calm the situation by feeding back their concerns, noting the concern/s down and calming the situation. (We hope this wouldn't ever be necessary, but meeting hosts can mute people, or even remove them from the meeting, at the press of a button! Certainly options you don't have face to face!)

### 6. Finishing the meeting

- Unlike face to face, online meetings end abruptly which can be quite disconcerting. In face to face people chat informally as the leave the room and make their back to office or cars. We suggest online needs to end more kindly:
  - Thank people for taking part and concentrating
  - Say something friendly like "I hope you can all get a quite break outdoors/ a chance to stretch your legs/ enjoy the sunshine"
  - Warn them I am going to close the meeting in 1 minute.
  - I look forward to meeting up with you all again soon
  - Close

## 1.3 After

### 1. Good post meeting practice

- Do all the usual things like circulating notes, implementing action.

### 2. Keep learning

- For larger more formal meetings get feedback on how people experienced the meeting. For informal smaller meetings just ask. This will maximise what you all learn about working online and speed up skills learning. Suggested feedback form is the Annex 4.
- Smaller meetings are the place to learn. But in the current context novice video conference hosts are having to speak to whole organisations and do big gatherings online. If it is well-received congratulations! If it doesn't run smoothly do as many smaller meetings as you can before the next big one. The best way to be at ease is practice! We're all in, or been in, the same boat so no one should worry if they're hesitant at first. For a bit of fun you can always put up a learner sign!
- Once you have mastered the essentials, you can make meetings more participatory and experiment with tools like white boards and break out rooms.
- Depending on the platform you use, there should be online advisors who can help talk you through any major technical glitches.

## 2 Guidance to send to participants for bigger meetings

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### 2.1 Invitation

Please dial in at the day before the meeting at [TIME] for an opportunity to test your kit and receive guidance if you need it. Also feel free to email [NAME] if you have any concerns or questions.

There will be a 15 min 'reception' before the meeting, as people dial in and get sorted.

Many of us are new to this so please don't feel under any stress – we are all learners

### 2.2 Before – guidance to help you prepare

- Dress appropriately from head to toe! You don't want to make the classic mistake of getting up at break time and everyone seeing you're not!
- Check what your camera will see behind you. You are inviting your colleagues into your house so work out if you are comfortable with what they will see. Mistakes can be silly posters, unmade beds, dubious books, mess and clutter!
- Think about light on your face – is it too bright or too dark? If the main light source is behind you, turn off lights or close curtains to stop being a silhouette.
- In advance please alert the people you live with that you are having a professional meeting. Remind them on the day and we suggest you put a sign on the door so they know to keep the door closed and noise down.
- Depending on internet connection speed, please advise the people you live with that you need the internet connection so high demand streaming of TV or online games will not be possible.
- Check the temperature of your room (home offices are often less used rooms, or garden offices, and may get too cold for longer periods).
- Get comfortable: have water, snacks, notebook and pen, cushion, and extra layers to hand.
- You should have already received the meeting Agenda. We suggest those with smaller screens print it out so you can easily follow the structure. Flipping back and forth from the agenda to the online meeting on your screen breaks focus on the group – and risks technical glitches.
- Your name will auto appear so make sure it's yours and not someone else who uses the computer. If it's not automatically yours, try editing your display name (e.g in Zoom, you can do this by clicking the 3 dots in the corner of your video). This will allow the host or other participants to refer to you directly by name when they want to.

### 2.3 During - guidance to help you take part

- This is a big meeting so the host will ask you to mute your audio during any presentations. This is to keep background sound to a minimum. They will explain how to do this.
- If the host puts you on mute, but you want to interject, we will tell you how to indicate this. If it is appropriate for participants to jump in and comment verbally, you can unmute yourself by clicking the 'unmute' button.
- When speaking in online meetings, particularly medium-large ones, it is best to say your name before making your point. Otherwise it can be difficult for the other participants to distinguish who is saying what on a screen of small faces.
- Always be patient and try to speak one-at-a-time. It is likely that people will start talking over each other at some point, particularly as sometimes there can be a delay, but it's important to be respectful and ensure everyone has opportunity to have their say.



- If you're struggling with getting to grips with being in an online meeting – don't worry! Try to engage with the meeting the best you can, and contact your meeting host after the event to help talk you through any worries or difficulties you faced in the session.
- At the end please fill in the feedback form/survey sent to you so we can learn and improve

## 2.4 After - knowing what to expect

The follow up to an online meeting should be fairly similar to normal.

- Your meeting host should share any notes/minutes from the meeting with you and all other participants.
- Please disseminate key info/share action points with your wider team.
- Please note any agreed action to help you achieve necessary action before the next meeting.

### 3 Online multi-stakeholder dialogue and consensus building

Successful environmental projects need great quality stakeholder participation and collaboration to result in systems thinking and well supported outcomes.

Right now too much is on pause. The nature and climate crisis really can't wait. So don't put everything on hold. We've fast tracked Dialogue Matters Online and can now offer our award winning dialogue design, facilitation and training that way.

Projects have rung us dejected and left the call excited. Get in touch and let's talk!

To give you a flavour of what is possible, we are now delivering dialogue, collaboration and momentum for:

- A partnership team reimagining their greener community project
- Online consensus building to agree a strategy for natural areas
- International dialogue and innovation in climate change research
- Researcher's collaborating and innovating across disciplines
- Training researchers to ensure their science has real world impact on policy or practice
- Getting our tool called the "Better Meetings Box" online. It includes a suite of meeting patterns and guidance. We are now working out how to make it affordable and available online.

Doing all this online introduces a whole host of new opportunities and challenges. Alongside everything you need to know for face to face Stakeholder Dialogue, online processes require the integration and use of several online platforms, bespoke templates and fluency with the tools. Sooner or later we will create a new course for how do to all that too! For now please help us help you to maintain some momentum!

**If any of this is of interest contact [admin@dialoguematters.co.uk](mailto:admin@dialoguematters.co.uk)**

## Annex 1 Conference Call Bingo

Have fun whilst you learn to work online - play conference call bingo! There are even online versions <https://www.lifesize.com/en/video-conferencing-blog/beat-the-phone-meeting-blues>

Hi, who just joined?	Can you e-mail that to everyone?	X? Are you there?	Uh, X, you're still sharing!	Guys, I have to jump to another call.
(Sound of someone typing... ...possibly with a hammer)	(Loud painful echo)	(Child noises)	Hi, can you hear me?	No, it's still loading.
Next slide please.	Can everyone go on mute, please?	Sorry, I was talking on mute.	Sorry, go ahead...	Sorry, my dog is really excited about this call.
So (fades out) I can (cuts out) by (unintelligible) ok?	Sorry, I am double booked.	X, your screen just greyed out.	Sorry, you cut out there.	Can we take this offline?
I'll have to get back to you on that.	Can everyone see my screen?	Sorry, I was having connection issues.	Sorry, I think there's a lag.	Sorry, the other call ran over.

## Annex 2 Hand Signals Conventions

These hand signal conventions have developed from big organisations and international networks who meet on line as a matter of routine.

### Hand signals (in order of importance):

1. Thumb up - yes, agree, like (depending on the question)
2. Thumb down - no, disagree, like (depending on the question)
3. Hand up (one hand held up and held steady close to face) - I want to speak, or I can, do, etc., in response to a "Who can ..." question.
4. Crossed arms (forearms crossed before face) - I object (simply if crossed close to wrists with open hands; violently if crossed at the middle with hands clenched) in response to, e.g., "If no one objects, then ..."
5. Nod (a SLOW head nod) or Vee (a hand held up with the two-finger "victory" signal) - I really like this (what is being said, the idea suggested, ...).
6. Crossed fingers (crossed index fingers held before the face) - impossible (or prohibited)
7. Jazz hands / sparkle hands (hands open either side of face and gentle shaking) - me too
8. Forefinger role (circle forefingers of both hands) in front of face - wrap it up

## Annex 3 On-screen body language – sending the right signals

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We all communicate with words, body language and micro expressions. We read each other's gestures, posture, tone and face before a single word is spoken. As much as 95% of all communication happens non-verbally. But we have all evolved to do this face to face so learning what works online is an art. Here are some suggestions.

### 1. When speaking

- Aim to look at the camera. Looking at the people on the screen feels the natural thing to do to make eye contact. But they won't experience it that way - you will appear to be averting your eyes which comes over as shifty!
- Be animated when you are speaking. Being too still will make you look disengaged
- Sit tall. It gives the impression of confidence and actually helps breathing and vocal expressions.
- Your upper body is visible to everyone –so energise your spine and show that you are paying attention and not falling off to sleep. Lean forward slightly to show your interest and keep your shoulders back.

### 2. When listening

- If you are listening to an answer to a question you asked try to look at the camera so the speaker experiences you as being attentive
- Keep your hands and body fairly still:
  - Fidgeting with things on the desk is a temptation but makes you look distracted.
  - Rocking in your chair makes you both irritating and impatient – and may risk your chair falling over
  - Gesturing wildly to someone out of shot to bring you coffee or paper will draw all eyes – we are programmed to look at rapid movement
- If you want to help the main speaker, mirror their body language (within reason) as that makes the other person feel relaxed.
- Your upper body is visible to everyone so aim for good posture - it conveys you are paying attention and not falling off to sleep. Leaning forward slightly shows interest ... but keep your shoulders back so it doesn't look like you are slumping over the camera.
- Remember everyone can see your face so wear a friendly expression and be careful with facial expressions. Sometimes it is easy to forget – so an exasperated expression, you would never reveal face to face, could be your undoing!.
- Beware of yawning – you can trigger an epidemic of yawning!

## Annex 4 Suggested feedback form for bigger meetings

<b>Name (optional)</b>	
<b>Date and meeting</b>	

### Before

**1. The advance material was helpful**

1 2 3 4 5 6 7 8 9 10  
I disagree I agree

**2. The purpose of the meeting and agenda were clear**

1 2 3 4 5 6 7 8 9 10  
I disagree I agree

### During - comfort

**1. The pace of the meeting was...**

1 2 3 4 5 6 7 8 9 10  
Too slow About right Too fast

**2. The meeting length was....**

1 2 3 4 5 6 7 8 9 10  
Too long About right Too short

**3. The number of breaks were...**

1 2 3 4 5 6 7 8 9 10  
Too few About right Too Many

**4. When it comes to the online meeting technology**

1 2 3 4 5 6 7 8 9 10  
I need more help I will be fine once I am familiar with it I am fine with it

### During – content

**1. The meeting was well structured**

1 2 3 4 5 6 7 8 9 10  
I disagree I agree



**2. I felt my input was heard**

1 2 3 4 5 6 7 8 9 10  
I disagree I agree

**3. I felt it was worthwhile and purposeful**

1 2 3 4 5 6 7 8 9 10  
I strongly disagree I strongly agree

**Any other comments?**

	
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