Protocols for Effective Virtual Conversations

Before the Meeting

♦ Plan to be in a meeting: make sure you have access to good phone and internet lines and a quiet space for the call.

♦ Call/sign-in to the meeting at least 3-5 minutes ahead of time and provide your name so the facilitator can track who is online <u>and</u> start the meeting on time.

♦ If you have never used the remote platform for your meeting, do a test run before the meeting to limit distractions to you and others.

During the Meeting

As the Facilitator or Chair:

♦ Review, at the start of the meeting, who is on the call, what the purpose of the call is, remind everyone of the meeting protocols, and state whether the session is/is not being recorded.

♦ Identify a topic lead for each agenda topic and ask the topic lead to say what outcome is being sought, e.g. decision, discussion, input, or report.

♦ Use a clarified "round-robin" order to check in with participants (suggested order might be: alphabetical, by decision-maker, agency, or individual).

♦ Direct the conversation to and between the appropriate speakers, as needed.

♦ Pause the speaker in order to allow questions and input from other participants.

As Participants:

♦ Stay focused and engaged in the meeting (don't multi-task just because you are on your computer!).

♦ Use the "mute" button when not speaking if you can anticipate distractions from your remote/home office (e.g. pets, people, traffic etc.).

♦ Allow the facilitator/chair to direct who will speak instead of interrupting or speaking over others.

♦ Follow the discussion protocols for effective conversations (see page 2).

♦ Use the chat function where available to let the facilitator and group know:
  o When you would like to speak or ask a question;
  o You want to indicate agreement with other speakers;
  o That you would like the speaker to clarify something; or
  o You need a break/need to step away.

Closing the Meeting
As the facilitator/chair (and group member), be sure to leave enough time at the end to:
♦ Review the action items that have been identified during the call and expected next steps, including who will do what and by when. Send a summary of this asap so those who 'drift' can stay on task after the call.
♦ Encourage the group to stay in touch as needed to accomplish their shared goals.
♦ Formally close the meeting: "Thank you for your time, I'm going to close the meeting now."

Discussion Protocols for Effective Remote Conversations

♦ Approach the discussion with a willingness to hear others' views so you may solve problems together

♦ When you do speak:
  ➢ Speak as though you are right, listen as though you may be wrong
  ➢ Maintain a professional tone and approach to the discussion

♦ Remember W.A.I.T: Why Am I Talking?!
  ➢ As you consider what you will add, focus on what is important to you and what you need, rather than on an argument for the sake of arguing.

♦ Separate the people from the problem: be hard on the problem and easy on the people
  ➢ Speak for yourself/your organization and let others do the same

♦ Treat each other with respect by listening to each other's thoughts without interjecting meaning, words (or body language).

♦ If the chat function is not available, let the facilitator know when you would like to speak or ask a question

♦ Speak again only after others who want to have done so.

♦ If your question or comment has already been said, don't say it again unless you need further clarification or unless you want the group to know that more than one person shares a point of view.

♦ If there is a video feed, stay conscious of the messages you may be sending with your body and facial expressions.
  o Ask others to clarify what their facial expressions may be saying if you need that added information.