



# Best Practices for Working Virtually

How can we prioritize human connection in a virtual setting?

Work happens through our conversations and relationships. When we meet in person, we talk, connect, work through projects and challenges together, strengthen our relationships, share ideas, have insights, and coordinate our follow-up actions.

*It can feel like all of this isn't possible when we meet virtually.*

However with a little creativity, we can accomplish this same work in virtual meetings—if we design them for *human connection*.

# Table of Contents

Create an environment that supports *human connection*

Creating the Right Conditions to Catalyze Connection	<u>3</u>
Virtual Meeting Design	<u>4</u>
Community Commitments	<u>6</u>
Four Methods of Working Together Virtually	<u>8</u>
Getting Your Business or Team Started With Video	<u>9</u>
Technical Standards for a Successful Virtual Meeting	<u>10</u>
Features to Consider in a Video Platform	<u>11</u>
Contact Conversant	<u>12</u>

# Creating the Right Conditions to Catalyze Connection

Work today is accomplished through conversation. We believe that in any conversation, meeting or gathering, it is essential to create an environment that supports human connection to produce the desired results. This is true whether it's an in-person or virtual setting; regardless of *how* we're having the conversation, we need to start with *why* we're having the conversation. The goal in virtual environments is to host conversations that immerse participants so thoroughly that they forget about the technology, enabling presence and a shared focus on purpose, outcomes and agenda.

Intentional planning with this aim in mind will set the stage for rewarding and productive meetings centered around human connection.

To create the conditions that catalyze this sort of robust dialogue, we recommend following some best practices that we have learned from our decades of experience in human connection and 7 years of applying this knowledge to the online space.

It may seem *easiest* to take an in-person meeting agenda and use it for a conference call in the same allotted time. However, we've learned that this approach often compromises conversational quality, negatively affecting engagement and fostering a lack of empathy. Both yield misalignment and inefficiency that impacts outcomes. How effectively the purpose and essential outcomes of a meeting can be achieved, and the available methods best suited to meet them, should drive decision-making when adapting to a virtual environment.

## Clarify purposes and outcomes *then* decide on the method

Too often we get caught up in jumping to a method (a tool, a magic technology, a "shiny new object") that we hope will solve a problem or make things easier. The technology and methods you use should serve what you are trying to accomplish.

First, get clear on why you are having a meeting and what you need to get out of it. Then, determine what conversations need to happen to accomplish those goals and who needs to be part of them. After those things are clear, select the technologies that will *enable* the conversations and outcomes needed.

## Here are some questions to consider when gathering, whether it's two people or several hundred:

- Why are we gathering? What important purpose are we here for?
- What is important for us to accomplish?
- How do we want people to feel as a result of this gathering?
- What do we want people to be thinking about?
- What actions do we want people to take as a result?

All these questions can then inform what methods of connection will be most important.

**Form follows function.**

- *American architect,*  
Louis Sullivan

# Virtual Meeting Design

## *Increase connection and decrease disconnection*

As we've mentioned, simply transferring existing plans to a virtual platform does not ensure the same crucial outcomes. Translating our design through the lens of *human connection* helps us adapt to these new virtual methods and successfully gather, discuss and learn.

We offer these guidelines to help optimize participant engagement, empathy, and collaboration as you brainstorm how to (re-)design your meetings for a virtual format:

### **Be prepared for the unexpected**

Your internet will suddenly lose connection. Your computer will reboot. These things *will* happen. The best way to manage these is to be prepared for them. For that reason, we highly recommend that there be at least two facilitators or people ready to lead the conversation. If you are going to be using a screen share, make sure more than one person has the document that will be shared. This way if one of you has a technical issue, the other can easily step in to continue the conversation.

### **Set ground rules and agree on expectations together**

Take the time, with your team or organization, to agree on norms and ground rules for virtual meetings. These are often unique to a business's culture, so be sure to have the conversation and agree, together. You can find some that we suggest in the section on [community commitments](#).

### **90 minutes per session maximum**

People simply cannot sit and stare into a computer screen for an entire day. We recommend limiting sessions to 90 minutes, followed by, at minimum, a 30-minute break.

Emphasize *conversation over presentation* by limiting presentation segments to 10 minutes followed by time for reflection, discussion, comments or questions. You can have multiple 90-minute sessions in a day, if you create these breaks along the way. If you have more than 90 minutes of content to cover, consider what the multiple purposes are being served during the conversation and break up the 90-minute segments to align with those unique purposes.

### **Mix people up**

Although the temptation is often to split people up by work groups or function, there are often very surprising results when you deliberately include someone from a completely different group or way of thinking. Virtual sessions make this possible in a new way. Especially for longer meetings, periodically switch people up and have them join the breakout of another group, if only for half the time. They will not only contribute to their new group but will also bring back new learnings to their usual team.

### **Build in sessions for working groups**

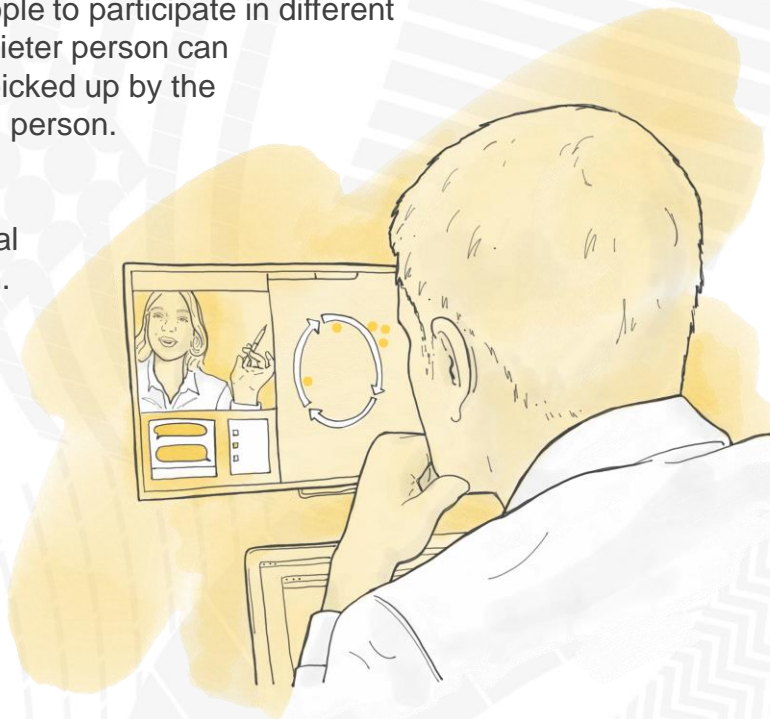
Breaking up big group sessions with smaller "working groups" creates space for focus on specific projects. Consider adding in a separate 90-minute slot (or whatever length works) to mix things up, split up the work, and increase engagement. You'll likely get even more done as a result. For example, you can have a large group participate in an initial 30-minute kick off/overview. Then have small working group(s) convene separately for 90 minutes. Afterwards everyone can come back together to learn from one another.

## Use whiteboards and chat to engage people in different ways

People think and learn differently, and our in-person meetings don't often engage the non-auditory folks as well as they could. Smart and creative use of digital whiteboards and chat (found in platforms like Skype, Zoom, and many more) allow people to participate in different ways other than speaking. For example, a quieter person can put something smart into a chat that is then picked up by the group in ways they likely never would have in person.

### Be creative

The methods for engaging and effective virtual meetings are limited only by your imagination. What we've listed here is just a start meant to spark your own thinking. Be on the lookout for jumping straight to method (the how) of what you will do, and always first be clear about your Purpose for meeting and the Outcomes you would like to meet. Then, get creative about how to cause the connection you're looking for. It's often surprising how intentional experiences can make the biggest impact.



## Use breakout rooms to increase conversation time

The more you can maximize each person's opportunity to contribute and to be in conversation, the more engaging and successful your meeting will be. 20 people on a call allows some voices to dominate and others to disappear into the background. Mixing up breakout rooms with 2-5 people each for small group discussions, then returning to the larger group to share insights, can be highly participatory and lead to new learning.

### Breakout room design also matters

When putting participants into breakout rooms, you'll need to be very clear about what you're asking them to do. We've found offering a topic for discussion or 1-3 questions for them to reflect on is useful. Ask them to assign a spokesperson from the beginning of the breakout so that person can be prepared to report out when they return. Provide guidance on what you want the person reporting out to focus on. As a facilitator, you'll want to decide if the discussion needs a facilitator present in each breakout room or not. One other alternative is to have facilitators drop into each "room" during the last 3-5 minutes of a breakout session to ensure teams are prepped for the discussion coming back. We find this to be most helpful with longer breakouts.

Be intentional about the size and duration of a breakout room. We recommend some general guidelines:

- For getting connected and introductions: 6-8 participants, allow 10-20 minutes
- For generating ideas: 4-6 participants, allow 20-30 minutes
- For sharing an experience/story: 2-4 participants, allow 10-20 minutes

## Share the learning

So much of how we coordinate our work together happens implicitly by being part of conversations with our team. When rejoining the larger group, it is very important that breakout groups and subgroups take time to record and share what they learned together along with the thinking behind their choices.

Our [Adjust Protocol](#) can be helpful in what questions you should be answering together.

# Community Commitments

## *Establishing norms and ground rules*

In the virtual space we want to create an invitation to participate fully, while also being understanding that things *do* happen—cats walk across the screen, internet connectivity slows, kids come barging in, dogs bark. All of that *will* happen—having empathy, compassion and understanding that virtual meetings will have a different feel than meetings in an office is critical to creating an inviting space where people want to participate.

Getting meeting participants clear and aligned on a set of collective commitments sets a baseline expectation for how we will all interact with one another. While they might seem obvious to some, being explicit about these expectations frees us up to fully engage with the purpose of the call without worrying about the basics. We recommend that these be established prior to the actual virtual meeting and then discussed at the start of the meeting.

*Here are a few suggestions:*

### **Treat video calls like in-person meetings**

- Prepare for and be present in a video call the same way you would if you were physically sitting around a table with one another.
- Show up early, participate, listen to what others have to say and contribute.

### **Use of video**

Establish the expectation from the beginning that everyone be on video. Although it might feel uncomfortable at first, people quickly adjust. Additionally, there may be instances where someone is uncomfortable sharing their video for personal reasons; it's important to discuss any concerns people may have.

### **Be fully present**

Close all other programs on your computer. This is not the time to multi-task. Also, mute your line when you're not speaking to ensure limited feedback/background noise.

### **Participation is expected and important**

While there is value in the information being presented during virtual meetings, there is even greater value in the conversations they afford. Attendees should expect to participate, and facilitators should ensure space and opportunity for everyone to contribute. Establish at the start of the meeting whether facilitators will call by name people who are not vocal.

### **Prepare the physical space**

- Minimize environmental distractions to the best of your ability: Turn off audible notifications on other devices so that they don't interrupt.
- Have paper and a pen nearby so that you can take notes, reflect, and write down questions while staying engaged in the conversation.
- Have water and/or snacks nearby so that you do not need to go offline during the session for refreshment.

## **Decide how you want to use the chat and be intentional about it**

The chat is a great tool *AND* it can be a distraction. You may want to clarify with the group whether you are requesting they limit 'side conversations in the chat'. We recommend using it intentionally and having an explicit conversation about how you'll use it each time. Some examples of how to use the chat intentionally:

- To answer questions
- To add thoughts or comments that add to the dialogue
- To pose a question that you'd like the group to *ALL* answer
- To request input

## **Have fun!**

We often set this as a community commitment: for people to use the virtual space as a place to experiment and play.

# Four Methods of Working Together Virtually

In observing what successful distributed and remote teams do differently from unsuccessful ones, they all have found solutions to four core “problems” that remote teams often encounter.

Remote teams need a way to quickly ask one another a simple question (**chat**), have a more connected and significant conversation (**video**), track who is doing what and the status of their work (**task tracking**), and have a central repository of shared documents and a tool for co-authoring and collaboration (**documentation & collaboration**).

## Chat

A chat tool allows for continuous conversations, being able to “go back and catch up” on the conversations and context you might have missed, contribute asynchronously, and in many ways, duplicate some of the benefit of “popping your head” into an office to ask a question. With the right mutual expectations, chat tools can be even more effective for connecting because they allow the recipient to stay in their workflow and respond when they’re free.

**Examples: Slack, Microsoft Teams, Google Hangouts, Facebook Messenger, Skype, Skype for Business and more.**

## Video

As [\*The 5 Sense Solution\*](#) explains, the more senses you can engage, the more aligned and productive the conversation. In fact, research has shown that a high-quality video call is virtually the same in human connection as an in-person conversation would be, with one important requirement: that the people in the conversation have met in person before. Either way, a good video call is the most effective means of connecting, particularly for multiple geographies. Make video calls a part of your everyday work and you will notice the difference!

**Examples: Slack, Microsoft Teams, Zoom, Google Hangouts, Skype, Skype for Business, WebEx, BlueJeans, ReadyTalk, and more.**

## Task and/or Project Tracking

One of the unique challenges of remote and/or distributed teams is that people are often working on the same projects together but in different time zones and/or at different times. One of the greatest sources of waste in distributed teams is coordinating timing. Task or Project Tracking Software becomes an online white board tracking what everyone is doing and where they’re at in their respective projects. This information is crucial for both planning and preparing your work and makes handoffs much smoother.

**Examples: Asana, Trello, Microsoft Project, Capterra, Wrike, Smartsheet and more.**

## Communication, Documentation, & Collaboration

Having a common place to store shared files and documentation, to co-author documents, presentations, and spreadsheets, and to collaborate on your work together is crucial for distributed and remote teams. In a common office, it is easy to lean back in your chair and ask your colleague for the document you need. You can easily get up and go into a conference room together to collaborate on a project. These methods don’t work in the virtual world. Instead, dispersed teams need to be creative in how they store, find, access and collaborate on files with one another.

**Examples: OneDrive and Office 365, Google Drive and Google Docs, Microsoft Teams, Slack, Asana and more.**



# Getting Your Business or Team Started With Video

## Does your network have the bandwidth to run multiple video call sessions simultaneously?

A stable internet/Wi-Fi connection is crucial to smooth calls. Depending on the company culture, people may join from home and use their own bandwidth, though personal Wi-Fi accessibility and quality is not guaranteed. If most come into the office for calls, you may need to upgrade the speed of your company network to allow for volume. The price you pay will be worth the benefit it provides in stable connections and clear video and audio.

## Do company computers have the capability to run smooth video calls?

Ideally, computers should provide good audio, clear video, and have powerful enough processing to host valuable video call capabilities (screenshare, virtual whiteboards, breakout rooms, etc.). Offering external cameras, headphones and ethernet adapters can add extra support.

### **Best Practice:**

***If one or two people are virtual, then everyone should be virtual.***

It might seem strange to have 10 people in the office spread out into separate rooms calling into a meeting, but this dramatically increases (and equalizes) participation. While we can try our best to be inclusive, the experience and participation is dramatically diminished for those not physically able to be with the larger group.



## Does your company or business have a preferred and supported video platform?

It's easiest to use what is supported because everyone is familiar with the technology, there are likely already established cultural norms around it, and IT folks can troubleshoot any problems. This decreases stress on the group allowing them to focus on connecting with one another, while IT gets to do what they're best at and support successful use of the technology.

# Technical Standards for a Successful Virtual Meeting

## **Everyone should be visible on video**

A video component can greatly enhance group engagement. High-quality video calls have been shown to be almost as connecting as in person conversations. Although it might feel uncomfortable at first, people quickly adjust.

## **Capable computer**

Make sure you have clear video and audio and that your computer has powerful enough processing for you to participate fully. If you notice a frequent "spinning ball" or crashes, slowness, or hanging of applications, chances are it is not up to the task. Confirm with a computer specialist, but you may need to invest in a new computer to do your work well.

## **Audio**

For the best audio, set yourself up in a quiet, uninterrupted location with headphones (they can improve sound quality).

## **Strong internet**

Make sure you are in a location with a strong and stable internet connection.

## **Lighting**

Make sure that the lighting in the room is in front of you and that people can see you clearly.

## **Test your computer and setup in advance**

Download all necessary software in advance and when possible try connecting before the scheduled meeting.

## **1-2 participants per computer**

Ideally each person should connect with his/her own computer to have access to chat and other platform features. If you must share a computer, no more than 2 people per computer is recommended.

# Features to Consider in a Video Platform

- ✓ Ease of use
- ✓ Open to all, or proprietary? (Can all participants easily access it, or do they need an account with the platform's host?)
- ✓ Does it support multiple people on video? How many?
- ✓ Does it include telephone numbers for people to join from their phone?
- ✓ Does it have a mobile application for people to join from a phone or tablet?
- ✓ Does it support screen share?
- ✓ Other useful options for engaging people fully:
  - Chat
  - Online whiteboard
  - Online breakout rooms



If you want our support putting all of this to work for a meeting you're planning, we would love to help:

### **Connect with us**

Join our [Presence Practice Community](#)

Find us on [LinkedIn](#)

### **Sign up for our [newsletter](#)**

to receive more resources and insights on building human connection that unleashes our collective brilliance.