

The Seven Secrets of Successful Virtual Meetings
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Abstract

Virtual meetings are a key part of the lives of today's project managers. The trouble is that they are often difficult to handle and most conference calls, audio conferences and online meetings are frustrating time-wasters. This paper will outline the seven secrets that project managers need to know to have successful virtual meetings, based on the author's work with hundreds of project managers worldwide in multinational organisations, from pharmaceutical and IT companies to banks and government agencies.

The presentation will help the reader to :

- Understand what goes wrong with virtual meetings and be able to diagnose how virtual meetings can improve;
- Prepare for and structure the next virtual meeting in a way that makes it more likely to succeed;
- Think through all the aspects of virtual meetings beforehand to check that the virtual meeting will be as productive as possible.

This paper will explore the vital area of how to run effective project meetings when you cannot be face-to-face with your team and stakeholders. Issues covered include building trust remotely and being aware of cross-cultural issues. We will touch on the tools used (but not go into detail on specific tools by vendor), look at communication on global projects, how social media can help and how to prepare for and structure effective online meetings.

Why are Virtual Meetings So Important for Today's Project Manager?

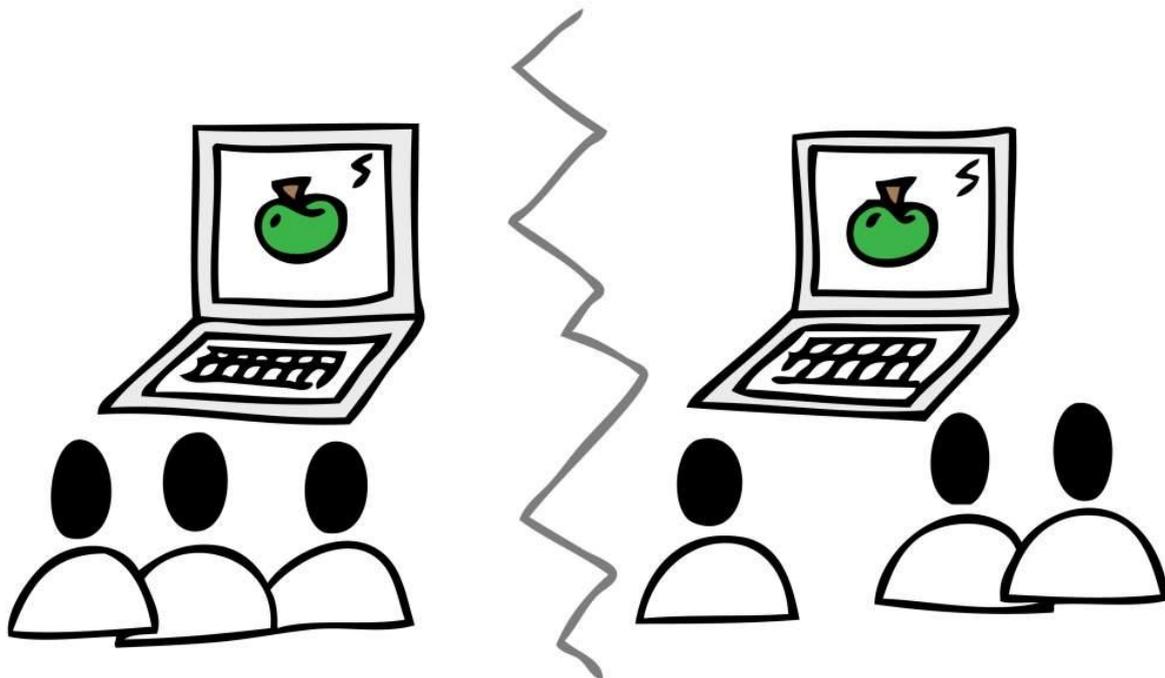


Exhibit 1: Cartoon showing two working groups in a virtual meeting with a common, shared screen

Over the last decade, the number of virtual meeting has increased dramatically, from the very occasional conference call to a situation where many project managers spend a large proportion of their time on conference calls and other virtual meetings. This rise has been driven by several global trends:

- the development of new technologies such as VOIP telephony (voice over internet protocol, an example of which is Skype) and shared computer screens;
- project managers often being located away from many of their project team members and stakeholders, with many more regional and global projects, especially since the surge in outsourcing and off-shoring;
- home working and telecommuting.

In the last year, the trend has been exacerbated due to:

- volcanic ash clouds over Europe in Spring 2010;
- the fear of epidemics, such as swine flu;
- the need to cut travel to reduce costs in an uncertain economic climate, with ever-higher petrol prices.

At the same time, climate change is an issue. Around 8% of the world's carbon emissions come from business travel, and perhaps a third of this could be replaced immediately with virtual meetings, if people knew how to use them effectively (Kane, 2010, p70; see also Smart2020, 2008)

My own story demonstrates how quickly a project manager may need to switch to virtual working due to the environmental pressures. In 2001 I was running a global project in a multinational company, improving processes in preparation for the implementation of SAP. My project team were dispersed all over the world, so I spent a lot of time travelling to meet people and run workshops.

Then something happened which changed everything. I was getting ready to run a big workshop in the United States. I was meant to fly out on the 13th September. Unfortunately two days before, 9/11 happened. Air travel just stopped. For several months, none of us were allowed to fly anywhere. I had to work virtually. We had an early form of instant messenger. We had some fairly primitive screen sharing applications. We had audio conferencing. We even had video conferencing. On top of this technology, I had the advantage of having been trained as a facilitator. So, as one does, we made do. We found people to advise us and got on with doing the project as best we could, learning all the time. I'm still learning nearly a decade later as I work with people in multinational companies who are struggling to be effective when they can't meet face-to-face.

What Goes Wrong with Virtual Meetings Today?

Unfortunately, working virtually hasn't lived up to all the expectations. When I speak to project managers at professional associations and on client sites, I ask them how many hours per week they spend on conference calls. To date, I have always found several project managers who spend more than twenty hours per week on these calls, most often from the pharmaceutical or telecoms industries. When I ask groups if they feel that their conference calls are the best use of their valuable time, only one person has ever agreed. Hundreds have disagreed.

This seems to fit what others find. One survey showed that only 23% of managers gave their full attention during conference calls, while 25% dealt with their e-mail and 27% did other work. This level of distraction is much higher than in face-to-face meetings (Hall, 2007, p53).

To find out more, I ran a survey of project managers in 2008 (Pullan, 2008) and found out what they were frustrated about with their virtual meetings. Here are some of the points which came up, in no particular order:

- People are easily distracted by other things such as work, e-mail, instant messenger, Facebook and more.
- Sometimes you can't hear clearly because of background noise. This can be due to people using speaker phones.
- Actions are far less likely to be done after virtual meetings compared to face-to-face meetings.
- The start of the meeting is often delayed, especially if you have complex technology to set up and people who are new to it.
- Often there is no level playing field; people are expected to dial in to a face-to-face meeting and sit listening all day, possibly in a different time zone.
- Not knowing who else is in the meeting, let alone who is speaking at any particular time.

- Lack of preparation.
- Not being able to get a word in.
- When you ask a question, nobody answers. When you ask for volunteers or you want someone to take an action, there can be absolute silence.
- Conference calls and virtual meetings can last far too long and people's concentration levels tend to drop.

How Can We Improve This Situation?

When working with virtual meetings, many different variables come into play which the project manager must be aware of. These include: the levels of trust in the team, the urgency of the work, the potential for conflict, the need for in-depth conversations, the mixture of cultures, the need for engagement and enthusiasm, the variety of time zones, the need for creativity and innovation in the team, as well as both access to and familiarity with the technology involved among team members (Pullan & Settle Murphy, 2005). Sometimes, especially at the start of a project, given the mix of these variables, it would be a good idea to bring everyone together before working virtually later on.

Once the project manager has decided that virtual working is appropriate, there are seven secrets which, when applied, will make their virtual meetings much more effective.

Secret #1: Technology isn't the Silver Bullet

The range of technology available for virtual working is growing all the time. Compared to when I started out in 2001, tools are very sophisticated with much more life-like "tele-presence" video conferencing on the market nowadays.

I've learnt from my clients that people often think that technology will solve *all* the issues of virtual working. Examples range from the CIO of a multinational spending six figures on tele-presence to the charity buying new laptops with webcams for every employee. In both cases, they thought they were doing the right things for their people. Although the tele-presence video suite is much closer to real life, to use it means travelling to the video suite. Will everyone be able to do this for each virtual meeting? No! Virtual meetings across time zones often involve participants joining outside working hours. Would you rather dial into a conference call at 3am or get dressed, drive into the office, go to the video suite, have your meeting, go home and go back to bed? I know which one I'd prefer to do!

I once worked on a project with governments in West Africa, with the UN and with representatives from international chocolate companies. We had to have all our remote meetings by conference call because telephones were the most reliable technology. If you're working across companies, the likelihood is that you will need to have a backup plan in place, because technology doesn't always work seamlessly due to company firewalls and other security. I advise clients to have a conference bridge line that you can call as a fall back. Share the presentations beforehand. Practice the technology. Then your meeting technology should support you, but there is much more to effective virtual meetings than that.

Secret #2 Make the Most of Different Time, Different Place

It is natural for a project manager to replace a face-to-face meeting with a conference call, video conference or online meeting. All three of these happen synchronously, the same as a face-to-face meeting.

<p>Same Time, Same Place</p> <p>Traditional meetings</p>	<p>Different Time, Same Place</p> <p>Project war rooms Shared displays</p>
<p>Same Time, Different Place</p> <p>Conference Calls Video Conferences Online Meetings Instant Messenger Text Messages Second Life</p>	<p>Different Time, Different Place</p> <p>Email Recordings Discussion Forum Social Media Blogs, Wikis, Video</p>

Exhibit 2: The Time and Place Grid

The second secret is to make use of the fourth quadrant: different time, different place. These asynchronous tools are often forgotten, but can make a real difference.

Here's an example: instead of spending the whole of your virtual meeting showing presentations (which is likely to take a long time and risk losing engagement), share the presentation on a discussion forum and ask for comments before your meeting. Then you can use the virtual meeting to focus in on questions that people have raised and areas of interest.

Another example is the use of social network tools inside an organisation to help project teams to get to know each other better. Many more examples of the use of social media for project teams can be found in Harrin, 2010.

Secret #3 Preparation is Crucial

Virtual meetings need preparation. This doesn't just mean setting up the technology, but making the following clear before and at the start of the meeting:

- What the purpose of the meeting is;
- The objectives which need to be achieved by the end of the meeting;
- A timed agenda;

- Clear roles, including facilitator (or chair), timekeeper and scribe (to take down action points and record decisions made);
- Agreed ways of working (or ground rules) such as 'State your name before contributing' and 'Mute when not speaking if you are in a noisy environment';
- Agree how actions will be recorded, communicated and followed up.

Our clients have found the graphic in exhibit 3 to be a good visual reminder of each of these points:

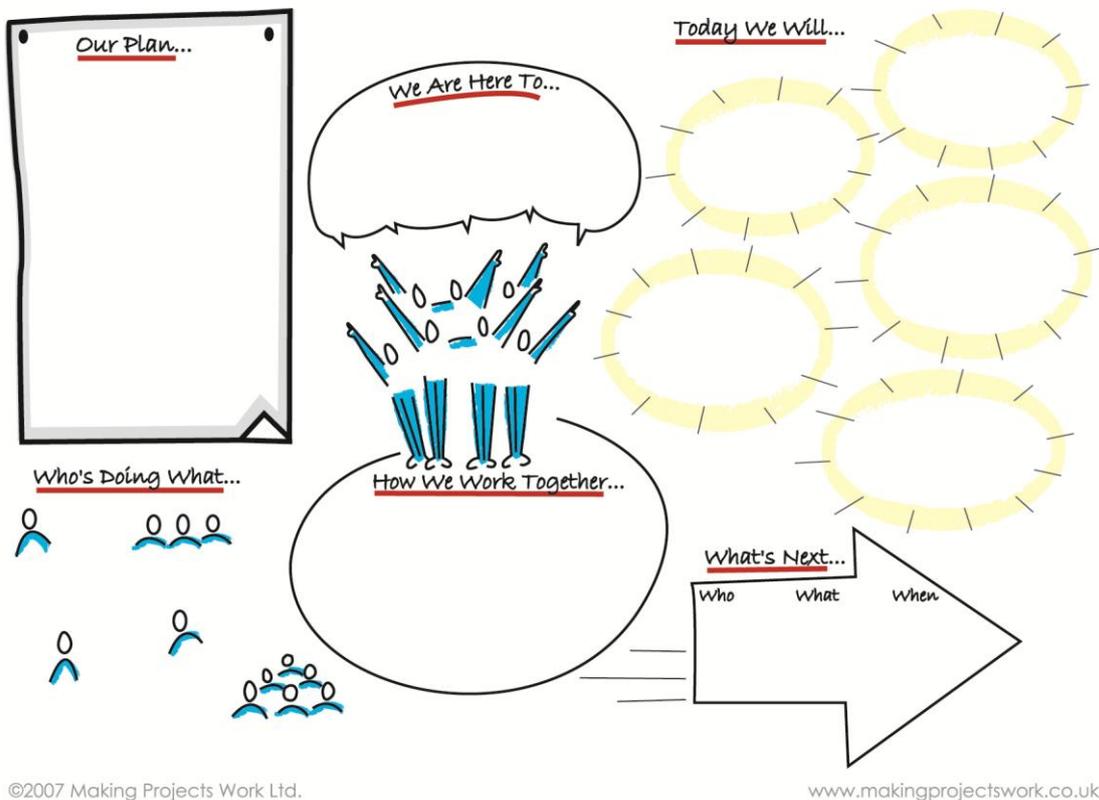


Exhibit 3: The Making Projects Work Ltd Start Up Template for Meetings

Secret #4 Give Up on Control

In face-to-face meetings, command and control sometimes still works. The leader can say, “You do this. You do that.” It just doesn’t work virtually, although I know there are people who try. You can’t control people when they are in a different location and you can’t see what they are doing. Some people will disconnect. Others will pretend to be present, but work on their e-mail instead. What’s needed in virtual meetings is collaboration, to engage people and work together. This means that the leader must take on the role of facilitator, drawing out what’s needed from the rest of the group and literally 'making it easy' (the root of facilitator) for the group to succeed.

Secret #5 Create a Level Playing Field

I often hear horror stories of how individuals are asked to join workshops by dialling in all day from a remote location. In one such story, the individual was in the UK and the group were in the USA. The individual dialled in at 2pm and staying on the line until 10pm at night. After a short introduction, the face-to-face team appeared to forget about him and, looking back, he felt that the entire eight hours spent on the phone had been a complete waste of his time.

The secret to solve this is to design for a level playing field. If one person needs to dial in, then why not have everyone dial in? An alternative is to hold a face-to-face meeting and reserve a portion of that meeting for talking with and focusing on the individual, who can dial in just for that part.

Part of this secret is to be aware of people's cultures and treat everyone with respect, not just those who happen to share your culture. A level playing field isn't just about access to technology!

Secret #6 Keep People Engaged by ...

The biggest challenge for companies that I work with is to keep people engaged and interested in virtual meetings. The most powerful things that I have found to keep people engaged are:

- the use of story,
- visuals representing the work and picture maps of everyone,
- keeping people involved,

Our brains are hard-wired for story from thousands of years of oral tradition. I took part in an international research project which established that information in story form was more effective in building relationships than simple lists when working in virtual teams (Thorpe, 2006).

As humans, we have multiple senses and on conference calls, we are only using our hearing. By adding visuals, whether on a shared screen or on pre-printed sheets, we are adding another sense. When people are concentrating on a visual related to the work, they are less likely to be distracted by e-mail or things going on around them.

Many of my clients explain that it is very difficult to engage with disembodied voices. One way to counter this is to provide a picture map, with a photo of each person on the conference call or online meeting superimposed on a map.

My final suggestion for engaging people is to give them things to do. Roles such as timekeeper and scribe can be rotated around the team. Different people can facilitate different parts of the virtual meeting. Ask people for their input. Make sure that everyone has a chance to put their point of view.

Secret #7 Check for Intentionality

It appears to be much more difficult to get people to take action after remote meetings, compared to face-to-face meetings. This is my own experience and also that of my clients. Project team members take action as a result of the commitment they have to the project. It is more difficult to build trust virtually and lack of action destroys what little trust has been built up. This can become a vicious circle.

To make actions more likely to be carried out, agree how actions will be documented and followed up, right at the start of your virtual meeting. Run through the actions at the end and check that everyone is clear on what they need to do and when. It is worth checking people's intentionality: on a scale of 1 to 10, how sure are they that they will carry out each action? If this number is lower than 10, it might be better to change the action slightly to make it more likely that it is carried out. After all, imperfect action that is taken trumps perfect action that never happens.

Conclusion

Virtual meetings are a fundamental way of getting things done for many project managers today. Many virtual meetings are frustrating and ineffective. With a little thought and preparation, they can be made both effective and efficient.

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