



Meeting face to face or remotely: Evaluating the options

Wondering whether you can have a successful meeting by meeting remotely versus speaking eye to eye? Here's a checklist to help you assess the likelihood of success.

If you agree with most of the statements in the first table, chances are, a face to face meeting will help you achieve your objectives better than a remote meeting. If, however, your responses suggest that a remote meeting may be just as effective, consider the questions in the second table (see reverse) as you make your plans.

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
1. If we achieve our intended outcomes, we have a lot to gain. If we don't, we have a lot to lose. It's critical that we're successful					
2. We have a great sense of urgency to achieve our goals. Time is of the essence. Delays are unacceptable					
3. A high degree of trust among team members is critical if we are to meet our objectives					
4. In-depth conversations are necessary for us to make well-informed decisions and reach agreement					
5. Topics of discussion are likely to be contentious or may cause conflict or evoke emotion					
6. Tapping the enthusiasm and energy of all participants will be important for us to achieve our goals					
7. It is unlikely we can achieve our objectives over a series of several brief meetings					
8. Creative brainstorming and problem-solving will occupy much of our meeting time					
9. It's critical that we test understanding, validate assumptions and/or clarify expectations					
10. Key participants represent a variety of cultures and time zones					
11. Not all participants have equal access or comfort with technology used for meeting remotely					
12. The cost for failing to achieve our objectives is likely to exceed the costs for assembling participants face to face					

Making Projects Work Ltd.

Ludlow House, 1 Cumberland Road, Loughborough LE11 5DE, UK Tel: +44 (0)1509 821691
 penny@makingprojectswork.co.uk/www.makingprojectswork.co.uk

Created by Nancy Settle-Murphy, Guided Insights and Penny Pullan



Planning for a successful remote meeting

If you answer “yes” to most questions, then with good planning and clear communications, chances are, you will have a successful remote meeting.

1. Are participants likely to stay focused on the work if we meet remotely?	No	Yes
2. Do we have access to facilitators who are skilled in planning and running remote meetings?	No	Yes
3. Is it possible to carve up the agenda into smaller “chunks” and still achieve the desired results?	No	Yes
4. Can some of the work we would ordinarily do face to face be accomplished either before or after the meeting instead?	No	Yes
5. Are participants likely to pay attention to prework and advance reading that may be necessary if we run the meeting remotely?	No	Yes
6. Do most participants know each other and work well together?	No	Yes
7. Are most participants accustomed to working in a distributed fashion already?	No	Yes
8. Have we considered ways to follow up, maintain momentum, and track progress remotely?	No	Yes

Making Projects Work Ltd.

Ludlow House, 1 Cumberland Road, Loughborough LE11 5DE, UK Tel: +44 (0)1509 821691
penny@makingprojectswork.co.uk/www.makingprojectswork.co.uk

Created by Nancy Settle-Murphy, Guided Insights and Penny Pullan