

Best Practices for Animating Meetings at a Distance (Video- and Tele-conference)

All Participants:

- When speaking, ensure you are close to the microphone and speak clearly. During videoconference, the camera should be on the speaker.
- Small noises in person are often magnified by a nearby microphone, so try to avoid shuffling papers, whispering, or making other noises that may be disruptive.
- Remember to include the entire group in discussions about the topics on the agenda, including side discussions.
- Members reporting to the board should “send out a simple half-page in advance to report on key agenda items...”¹
- When asking a question, begin with the name of the person or place you are addressing.
Examples: Jennifer, have you been able to..? Dalhousie, can you see..?
- When conducting a videoconference, hand signals may be used to indicate responses.
Example: In response to “James, can you hear us?”, James can give a thumbs-up.
- In videoconference, during times of casual conversation, make an effort to engage with those on the screen.

In-Person Participants / Distance Participants:

- Before speaking, say “Question” or “Comment.” This will allow the chair/moderator to call on you in turn and ensure that all participants have equal opportunity to speak on a topic. It isn’t necessary to wait for the chair/moderator to stop speaking before saying “Question” or “Comment” unless the group has been asked to hold questions and comments until the end, but you must wait for the chair/moderator to recognise you before you share your thought.
- Say your name before speaking if there are people attending by phone and if the chair/moderator hasn’t already identified you verbally.

Distance Participants

- Arrive on time. Arriving at least 5 minutes before the meeting begins is important in order to iron out any technical issues. Arrive earlier to engage in pre-meeting chat by videoconference.
- Try to avoid putting the call on hold to answer another call as you may miss critical aspects of the meeting and opportunities for input on these topics.

- Mute the sound on your end if required.
- Ensure that your coworkers and other people nearby do not interrupt you while you are attending the meeting. You might close your door or put up a sign.

Chair / Moderator

- Take time to remind the group of the basic rules (above) at the beginning of the meeting.
- Introduce or take verbal attendance of present members at the beginning of the meeting.
- Share all documents that will be discussed with all participants ahead of the meeting.
- Remember to invite input from distance participants on key topics. You might identify these topics ahead of the meeting. You do not need to seek input on each topic. Try to strike a balance.
- Ensure that the room you will be using has appropriate acoustics and is quiet. You may want to test a room before you choose it.
- Make certain that the technology is set up so that people can connect 15 minutes before the meeting begins.
- When in videoconference, turn on the video 15 minutes before the meeting and during lunch to encourage casual conversation among all attendees. Let everyone know you are doing this and why.

¹ <https://hbr.org/2015/03/how-to-run-a-great-virtual-meeting>