Virtual Meeting Guide

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Technology

Working as a team is just part of the job. So is using technology. From emails and text messages to online chat and conference calls, determining how best to communicate is essential for a team to work together. In order for effective communication to work, teams must choose what methods work best for them and establish clear guidelines around when, where and how a team communicates with each other.

If your company has not established an online team communication strategy, please review these online meeting options that can keep your team connected.

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Slack

This team messaging tool brings all types of communication together seamlessly, eliminating the need for long email threads and links. Slack users report a 49 percent reduction in internal email, helping them streamline work and become more productive. Team conversations can be organized into open or private channels for particular departments or projects.

The app, which can be loaded onto both computers and mobile devices, integrates with all social media platforms, as well as file sharing programs such as Dropbox. Users simply drag, drop and share images, PDFs, documents and spreadsheets. Colleagues can add comments or flag messages for future reference, and the completely searchable platform instantly synchs with other programs.

The basic plan is free; three paid upgrades offer enhanced features and controls. Special pricing is available for qualified nonprofits.

Join.me

This versatile, easy-to-use program can be loaded onto desktop computers, laptops, tablets and smartphones. Join.me allows up to 10 individuals to view your screen at the same time, fostering collaboration for idea generation, sales demos and presentations. The online tool ranked No. 1 in customer satisfaction for ease of use, speed, and reliability in a 2014 survey, and was used to facilitate 30 million meetings last year.

The affordable program has three levels. The free version features instant screen sharing and video conferencing with VoIP; Pro adds online meetings with unlimited audio conferencing and costs less than $20 per month with an annual contract; while Enterprise offers advanced management capabilities and costs less than $25 monthly with an annual contract.

Dropbox

Dropbox co-founder Drew Houston developed the Dropbox concept in 2007 after repeatedly forgetting his USB flash drive while he was a student at MIT. Simple and easy to use, the file hosting service has won many awards. Offering cloud storage and file synchronization, it can house documents, photos and videos. Your team can access this material from anywhere, as the material will automatically show up on all synched devices, as well as the Dropbox website.

The tool is particularly helpful for sharing large files and backups. A basic account featuring two GB of free online storage and 20 GB of traffic per day is free; users can upgrade their accounts to provide more capacity. For Pro and Business accounts, the limit is 200 GB per day.

Google Drive

Launched in 2012, Google Drive is a file storage and synchronization service created by Google that allows users to store files in the cloud, share files and edit documents, spreadsheets, presentations photos and audio files. Many view it as the king of real-time document collaboration.

Individuals can write and edit on the same document, at the same time, with chat and comment features. All changes are automatically saved. Users can access the documents anywhere, at any time, from their smartphones, tablets or computers.

The program is compatible with Microsoft Word, providing editing and styling tools for formatting text and paragraphs. Links, images, drawings and tables can be added. Users get 15 free GB of storage that is shared across three of its most used services: Google Drive, Gmail and Google+ Photos. If that is not enough, they can purchase more storage for a monthly fee.

FaceTime

FaceTime is a video chatting tool for Apple users. With a simple tap, users can make video calls over Wi-Fi from their iPhone, iPad, iPod touch or Mac desktop or laptop to someone else's, using cameras on the devices. Availability over a cellular network depends on carrier policies, and data charges may apply.

The picture-in-picture view allows individuals to see how they appear to the person they are calling, using the front or rear camera, in portrait or landscape mode. Although groups can gather around the Mac screen or integrate the power of Apple TV, FaceTime does not support group conferencing.

Unfortunately, FaceTime is incompatible with non-Apple devices. Alternatives for Android users include Google Hangouts, Skype and Viber.

Skype

Skype, which was founded in 2003 and is headquartered in Luxembourg, is a division of Microsoft Corp. Many consider it the granddaddy of videoconferencing tools, and millions use the tool on a daily basis to network with colleagues around the world.

The app can be loaded onto smartphones, computers or even televisions that will support it. Free HD video calls can be made and broadcast to groups of up to 25 individuals; Skype can also be used for group chats. Photos and files of all sizes can be transmitted using the tool. Skype to Skype calls are free, anywhere in the world. Calls to mobile and landlines worldwide are charged at low rates.

The program supports instant messaging, texts and emojis. A special translator feature allows users chatting with someone who speaks another language to translate calls and instant messages.

Periscope

Periscope is a live streaming app for iOS and Android. Users broadcast live video from their phones, in real time. Planners could use it for a live interview that is then streamed to Twitter. During a conference, the planner could give those who could not attend the event a taste of what they missed.

Zoom

Zoom is an online video conferencing service that allows users to pull in up to 50 HD video streams at the same time. Zoom's engineers have more than 900 years of combined experience working on real-time collaboration software.

More than 200,000 businesses, including the California State University system, use it. It offers video, audio and screen sharing, as well as group messaging, on all sorts of devices. Meetings have a time limit for the free version, but the system can be upgraded for $14.99 per month.

Freeconferencecall

This aptly-named tool provides free online teleconferencing for up to 25 people. Calls can be recorded, shared or saved to be heard later on-demand. Free international service is offered to 58 countries, making hosting a global conference call a breeze. The company claims that it has hosted a billion calls. The meeting wall can be customized with a headshot or logo. Apps for mobile Apple and Android devices are available.

GoToMeeting/GoToWebinar

Business travel by plane or car is expensive and time consuming. Companies can significantly decrease costs using meeting/webinar tools. GoToMeeting/GoToWebinar is a flexible, professional and reliable platform used by 3 million users around the world per month. The company says it hosts 56 million online meetings annually.

Some attractions of this tool are live 24/7 support, and the fact that the number of online meetings a company can hold each month is unlimited. Privacy is protected with end-to-end encryption and strong passwords. Pricing for GoToMeeting/GoToWebinar ranges from $24 to $49 per month.

WebEx

This product, produced by global leader Cisco, is used by many Fortune 500 companies. The company states that 51 million people per month attend a WebEx meeting. The free version allows users to meet and work with two other people; the premium version offers tiered platforms ranging from $24 per month for up to 8 people, to $69 per month for up to 100 people. Features in the paid subscription models include multiple feed or side-by-side with screen sharing viewing modes, the ability to sketch ideas on a virtual whiteboard or annotate documents, and the ability to record meetings.

GroupMe

GroupMe is a free mobile messaging app that planners can use to coordinate private chats among coworkers. It works on all device platforms. Users can chat on the go, or from their office computers or from tablets at home. It can incorporate pictures, emojis and videos, and has other features such as location sharing and direct messaging.

Technology Checklist

When considering an online meeting platform for your team, use this checklist to guide you in making the decision.

- ☐ Features and functionality needs
- ☐ Ease of use
- ☐ End-user experience
- ☐ Cost and budget
- ☐ Set-up complexity

- ☐ Quality of service and features
- ☐ Solution reliability
- ☐ Vendor reputation and support
- ☐ Trade-offs of cost vs features
- ☐ Consult a trusted technology advisor

Planning

A virtual meeting needs to have a format established so that it runs smoothly. Just like in-person meeting, there are guidelines that participants should follow to assure a successful meeting.

Platform and Technical Assistance

Before meeting, assign roles and responsibilities for organizing the meeting. This includes setting up the online meeting, verifying software works and notifying attendees of software needs prior to the meeting. It also means being able to provide technical assistance and answer any questions a participant may have about accessing the meeting, the format used and troubleshooting to assure things run smoothly.

Identify team members who may already have knowledge of the platform used. Ask if the would be willing to assist team members with technical issues and serve as a Point-of-Contact for technical assistance. This can be something as simple as making sure a participant has the right phone number to dial into a conference call or a technical as assisting with downloading software.

Preparing for the Meeting

After identifying who is responsible for leading the meeting, an agenda is essential. Create an agenda by setting objectives and having a clear purpose for the meeting. This assures attendees they will know what is being discussed and how they are to be involved. Circulate the agenda beforehand. Send out materials at least one day ahead of time and make sure to include how a participant can access the meeting (such as phone number, URL, access code, passwords and who to contact if they need help, etc.). Ask participants to come prepared and ready to participate.

At least three days prior to the meeting, organizers should do a test run of the technology to identify and address any issues that may exist prior to the actual meeting. Verify connectivity, Internet speed, sound quality and video functionality. The same goes for participants. Included in the agenda should be instructions and a request that participants sign-in to the meeting at least 15 minutes prior to its start to verify they can access the meeting without any issues.

Ensure all meeting participants have the meeting invitation link and materials in advance of the meeting. Consider setting up the meeting with no moderator. Make sure your presentation is ready to show. Test it before you start the call. If your presentation is visually dense or contains video, consider distributing it to participants in advance.

Be prepared to leverage good meeting practices, such as sending an agenda in advance; having a meeting facilitator, time keeper, and note taker; and sending out minutes after the meeting.

If you are the remote site on a video conference, seek as quiet a space as possible with no or minimal background noise. Arrive early to allow time to troubleshoot and resolve any potential issues with equipment. Ensure that everyone has their cameras on. This provides a more complete interactive experience for the meeting.

If you are connecting from a laptop, try to plug in to wall power, because battery use can adversely affect video quality. Consider setting up a back channel for communication to the other site(s), such as Slack, Jabber, or email. This allows for communication without interrupting the discussion.

Close all blinds and doors to cut down on potential glare. Interior lighting should not be too dark or too bright. Normally, the settings used in a traditional work environment are adequate. Adjust the camera angle or seating position to ensure you are on camera.

Checklist | 15 Minutes Before the Meeting

Organizer Tasks
Just before the meeting starts, organizers should:

- ☐ Set up tech and materials

- ☐ Make sure you are sitting in a well-lit location so participants can see your face

- ☐ Check email for responses and questions

- ☐ Double-check audio and video settings

- ☐ Have guides ready to send to people who have tech problems

Attendee Tasks
Just before the meeting starts, attendees should:

- ☐ Make sure your camera is on

- ☐ Make sure you are sitting in a well-lit location so participants can see your face

- ☐ Avoid distractions. Join from a place where you can focus and remove or avoid noisemakers (i.e. pets, children, public spaces)

- ☐ Mute yourself when you are not speaking

- ☐ Check your system in advance. If you need help, ask for it

It's Go TIme! Let's Meet

Once all attendees are present, take a minute to conduct an audio check. Making a quick round of introductions is an effective way to do this. Introductions break the ice and ensure that everyone can hear each other properly. If you plan to record the meeting, notify all participants at the beginning of the meeting.

Always remember and acknowledge when there are remote participants. Reach out to them periodically to see if they have a question or something to contribute. Having remote participants on video, versus audio only, ensures that you remember they are in the meeting. Remote participants should not be an afterthought.

Meet Checklist

If you've done all your prep work, conducting the meeting should be a breeze. However, there are a few things to keep in mind when you get started:

- ☐ Start on time

- ☐ Review expectations

- ☐ Allow for introductions

- ☐ Don't multitask

- ☐ Check attendee list

- ☐ Monitor for questions

- ☐ Direct questions to specific individuals to increase engagment

- ☐ Keep participants focused on the agena items and prevent off-topic discussions

- ☐ Use Webcams for better interaction

- ☐ Press the record button and share the recording afterwards

Virtual Meeting Rules and Etiquette

Virtual meetings require rules and etiquette just like regular meetings. But many of the rules apply to how an attendee or speaker engages each other using the technology for the meeting.

When not speaking, make sure your audio is muted. This will prevent inadvertent noises, such as coughs, rattling papers, or chair squeaks, from interrupting others. Do not shuffle papers or cover the microphones on the table as noises can be distracting or cause someone not to hear or understand what is being said. When presenting or asking a question, speak clearly and in a normal voice. There is no need to shout.

When videoconferencing with many sites, start your comment or question by stating your name. This helps other sites identify who is speaking. When you ask a question or request information, allow time for slightly delayed responses because the system may experience slight transmission delays. Direct your questions to a specific individual. When leading a call, keep inventory of who's talking on the calls and reach out to people you haven't heard from.

When possible, avoid interrupting others as they are speaking. Many video conferencing systems have a voice-activated switching feature to automatically move the camera to the active speaker. Interrupting another speaker may confuse the voice activation. Establish an understanding among participants of when and how to interrupt. For example, have people raise hands or otherwise signal that they want to speak. As with any meeting, limit side conversations and multitasking.Listen for virtual "hand raising" and periodically pause to let people on the phone speak up.

Leverage online collaboration tools like Google Drive to take notes, share content, and collaborate real-time. This enables all participants to interact, versus using a physical whiteboard or other physical visuals only available in the primary conference room. Consider posting pending questions via chat.

Something that participants need to remember is simply how they appear on camera to a viewer. For example, don't turn your back on the camera and maintain eye contact with the camera to appear engaged in the meeting. Make sure you dress appropriately. This goes beyond making sure you're not in your PJs. It refers to how a camera's lens interprets you and movement. For example, striped shirts do not transmit well on camera, nor does large shiny jewelry. Both can be visually distracting. Also, when using a webcam, you should keep your body movements to a minimum as excessive movement can actually degrade video quality. Avoid quick movements, which make it difficult for cameras and microphones to keep up with you. Quick movements may appear jumpy or choppy to others on the call.

Do's
- Do be prepared
- Do be courteous to other participants
- Do ask questions
- Do speak clearly
- Do keep body movements minimal
- Do move and gesture slowly and naturally
- Do maintain eye contact by looking into the camera
- Do dress appropriately
- Do make the session animated
- Do be yourself and have fun!

Don'ts
- Don't be late
- Don't talk constantly. Share the forum.
- Don't interrupt
- Don't make distracting sounds
- Don't shout
- Don't make distracting movements
- Don't interrupt other speakers
- Don't carry on side conversations
- Don't wear "noisy" jewelry
- Don't cover the microphone

Fun and Games: Conference Call Bingo!

Virtual meetings can be...how do you say it...BORING! But they don't have to be. After a few times of meeting you'll discover that there are a lot of frequent activities that happen on a call. A dog barking. Noises in the background. Someone forgot to mute their phone. The feel good cliche someone always says during a team meeting. You get the idea!

We've decided to take these instances that are a regular part of a virtual meeting and make them fun by including them in a Conference Call Bingo game. The game is designed to help you maintain your sanity while you sit through the tedium traditional conference call. Plus, it's really fun. The game is totally optional, but after a few meetings, we're sure you'll be digging out the Bingo boards and playing along.

How to Play
- Share the bingo cards as part of the materials and agenda sent to attendees
- Provide a set of rules that works for your meeting. For example:
    - Print out the card and keep it near you during the meeting
    - When someone says a phrase or does an action, put an X on the square
    - If the phrase or action happens multiple times, use ⦀⦀ to records it.
    - Each square is worth 5 points and 1 point for each additional time the square is used.
    - BINGO wins if the card either contains a blocked out full row, column, diagonal, border or entire card. You decided when announcing the game.
    - Announce BINGO only at the end of the call so that the game does not cause any additional interruptions.
    - If there isn't a BINGO, ask participants to add up their score and announce a call winner.
- Once on the call, let the attendees know the game is available if they want to play.
- Include the game's rules in your agenda's housekeeping duties before starting the meeting's discussion.
- Finally, keep it business as usual, but have fun, because we all know something is gonna make you say BINGO!

The following pages contain six BINGO game boards with common phrases and actions that occur during a virtual meeting. You may want to create your own and we've provided you a blank version for that reason.

Have Fun!

CONFERENCE CALL

BINGO

B	I	N	G	O
Someone Enters Late	"At The End Of The Day"	Two People With Same Name	Sneeze	Soft Talker
"Can You Repeat That?"	Loud Talker	Uncontrollable Cough	Hold Music	Someone's Eating
"Hit The Ground Running"	"Can Everyone Hear Me?"	★	"Did Everyone Get The Attachment?"	"Win-Win"
"Call Me After We Hang Up"	Dog Barking	"Drink Our Own Kool-Aid"	Two People Talking At The Same Time	Someone Working From Home
"Let's Move On."	"Talk Offline"	Inappropriate Comment	Baby Crying	Question Avoided

CONFERENCE CALL

BINGO

B	I	N	G	O
Someone Typing	"Drink Our Own Kool-Aid"	Sneeze	"Is Everyone Here?"	"Let's Move On."
Someone Calling In From Car	Two People With Same Name	Soft Talker	Someone Enters Late	"Talk Offline"
Dropped Caller	"Win-Win"	★	Weather Mention	Uncontrollable Cough
"Leverage"	No Idea What They're Talking About	"On The Same Page"	"I Have To Drop Off"	"At The End Of The Day"
Someone Working From Home	Argument	"Did Everyone Get The Attachment?"	Baby Crying	"Can Everyone Hear Me?"

CONFERENCE CALL

BINGO

B	I	N	G	O
Stranger Enters Call	No Idea What They're Talking About	"Can You Repeat That?"	"You're On Mute."	Someone Enters Late
"Out Of Pocket"	Cell Phone Ringing	"Can Everyone Hear Me?"	Inappropriate Comment	Misuse Of Word
Someone Calling In From Car	Someone Working From Home	★	"Call Me After We Hang Up"	"Did Everyone Get The Attachment?"
Loud Talker	"At The End Of The Day"	Dropped Caller	"Touch Base"	"Leverage"
Question Avoided	Know-It-All	Someone's Eating	"Drink Our Own Kool-Aid"	"Win-Win"

CONFERENCE CALL

BINGO

Dropped Caller	Misuse Of Word	"Is Everyone Here?"	Know-It-All	Stranger Enters Call
"Call Me After We Hang Up"	Two People Talking At The Same Time	"Leverage"	"Talk Offline"	"You're On Mute."
"I Have To Drop Off"	"Out Of Pocket"	⭐	Soft Talker	Someone Typing
Hold Music	Someone Repeats Themself	Sneeze	"Hit The Ground Running"	Uncontrollable Cough
"On The Same Page"	Argument	Inappropriate Comment	Loud Talker	"Drink Our Own Kool-Aid"

CONFERENCE CALL

BINGO

B	I	N	G	O
"At The End Of The Day"	"You're On Mute."	Someone Calling In From Car	Weather Mention	Cell Phone Ringing
Someone Repeats Themself	"Did Everyone Get The Attachment?"	Someone Working From Home	Argument	Someone Typing
Dog Barking	"Can You Repeat That?"	⭐	Know-It-All	Inappropriate Comment
"Can Everyone Hear Me?"	"Drink Our Own Kool-Aid"	"Call Me After We Hang Up"	Baby Crying	Two People Talking At The Same Time
Misuse Of Word	Loud Talker	Question Avoided	No Idea What They're Talking About	Someone Enters Late

CONFERENCE CALL
BINGO

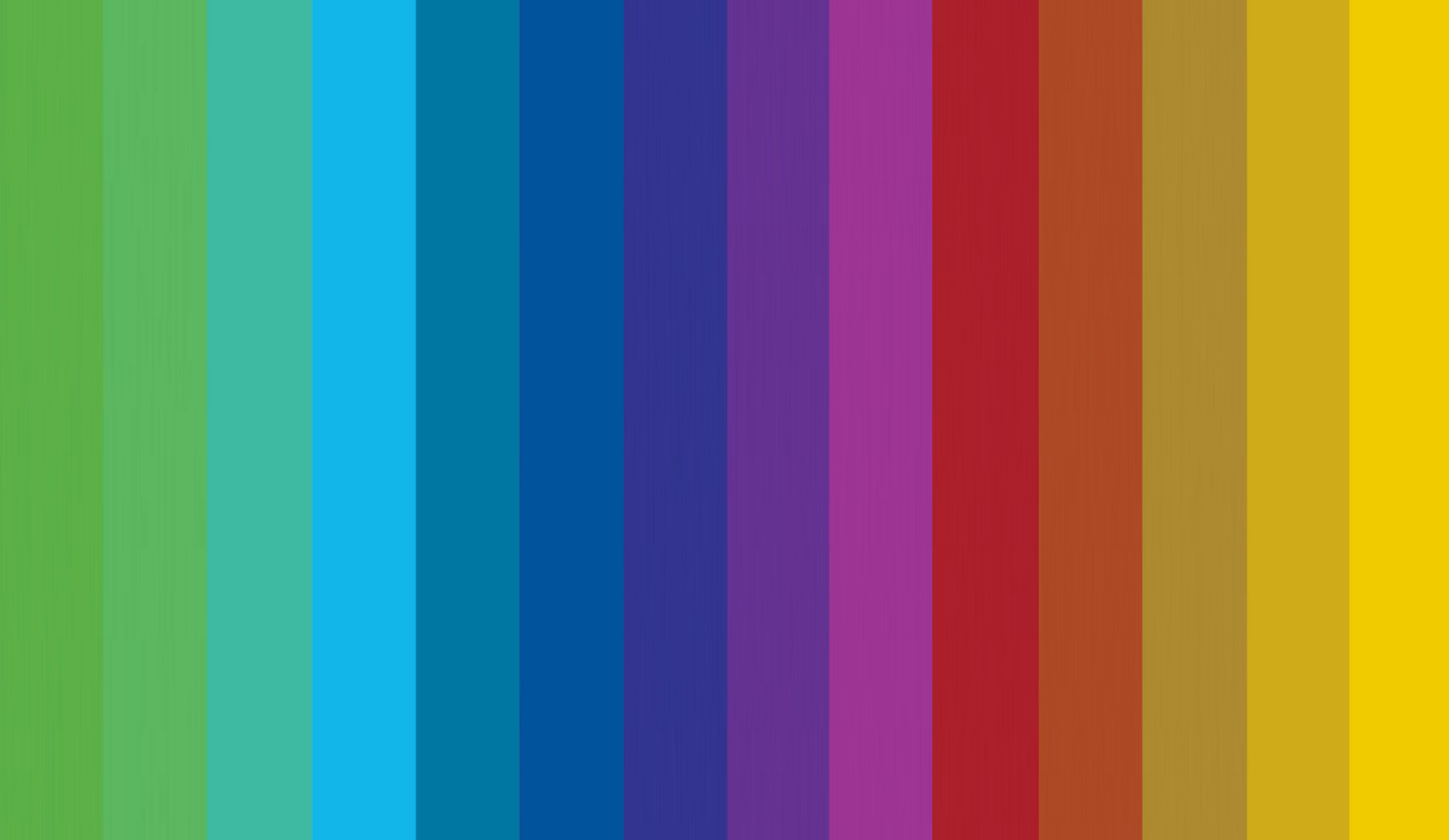| B	I	N	G	O
Loud Talker	Soft Talker	"Did Everyone Get The Attachment?"	Question Avoided	Someone Enters Late
"Hit The Ground Running"	"Can Everyone Hear Me?"	Uncontrollable Cough	"Low Hanging Fruit"	Two People Talking At The Same Time
"I Have To Drop Off"	"Drink Our Own Kool-Aid"	⭐	"You're On Mute."	Foreign Accent
Stranger Enters Call	"Let's Move On."	Misuse Of Word	"At The End Of The Day"	"Can You Repeat That?"
"Out Of Pocket"	Dog Barking	Someone Repeats Themself	Someone's Eating	"Is _____ On The Call?"

BINGO

B	I	N	G	O
		★		

Quality Improvement Organizations
Sharing Knowledge. Improving Health Care.
CENTERS FOR MEDICARE & MEDICAID SERVICES

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