

Innovation insights

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Virtual Meetings and Virtual Teams Using Technology to Work Smarter

You need to have a meeting. Some of the people you'd like to include are located at other campuses. All are eager to participate. But schedules and travel funds are so tight that none of the participants can find the time to travel to one location to meet face to face around a table.

You want to maximize the benefits of interaction and synergy while minimizing the resources needed to bring people together. You want all participants to be able to communicate at the same time, in real time, from different locations. You decide you'd like to use technology to schedule a "virtual" meeting, communicating without having to travel. What are your options, and what do you need to do to have a successful meeting?

The following is a means to increase your awareness of the options available, give you some pointers for success, and provide you with resources for additional information. It's not a definitive review of options for holding a virtual meeting. This is a field in which the options are continually expanding.

MEETING BASICS

First, the components of a successful traditional meeting still apply. Determine the purpose of the meeting you will be having: sharing information; generating ideas; evaluating options; or making decisions. Let participants know who will be attending the meeting. Develop an agenda, and provide it to participants, in advance if possible, so all can be prepared. For each topic on the agenda, indicate who has the lead, and how much time you expect to spend on it. Identify someone to record the decisions made at the meeting, and afterwards promptly distribute minutes containing those decisions, next steps, action items and individuals responsible, and a proposed agenda for the next meeting, if there will be one. If the group will have a series of meetings, have the group develop ground rules, so they know what to expect from each other. If there will be just one meeting, you can probably rely on common courtesies, such as not interrupting and being respectful of each other.



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VIRTUAL MEETINGS

A virtual meeting adds a few more factors, since all at your meeting are not in the same room. The first factor is related to preparation. You won't be able to hand out materials, so you'll need to plan how you will be providing all participants with any documentation. Fax or e-mail may be available, but you'll still need to allow some time for sending, receiving, and printing the documents. Make sure at the start of the meeting that all participants have all of the needed materials. You'll also need to make it clear during the meeting which document, and maybe even which page or section, is being referred to.

The second factor is related to communication. The most frequent concern regarding virtual meetings is that you lose non-verbal communication. Even if you can see the other participants on a video or PC screen, you may not be able to observe the finer points of their body language. If you are in a chat room, you can't hear the tone of their voice. However, there are also less obvious issues. You may not know for sure that your communication was received. You may not have any indication that others are listening. You may not be sure how long to wait for responses. These issues can be addressed by proactively discussing them at the start of your virtual session. They may also involve adding a section to your ground rules to specifically address issues related to a virtual meeting.

OPTIONS FOR VIRTUAL MEETINGS

You have several options for your meeting, and they are not all high-tech. For more information about these options, check the Penn State University Web resources listed at the end.

The easiest option to start with is telephones for a **conference call**. Technical requirements are simple: you'll need a phone at each location, and a speaker phone if more than one person is at that location. You'll be able to hear each other, but you won't be able to see their face, body language, or how they are referring to written material. A three-way call capability is available on all telephones at University Park. For more than three participants, Penn State's Call Center Services offer several scheduling options.

If you'd like to see the other participants and their materials or documents, you can use **videoconferencing**. There are two approaches. The first is to meet in rooms equipped with dedicated videoconferencing equipment, including one or more monitor screens, camera(s), and a control system. The second is to meet via PC, for desktop video conferencing (DVC). For this, you'll need a camera, microphone and speakers at each PC. Broadband connections will reduce delays in transmitting video images. There are tradeoffs of image quality, cost, access, and convenience between the two approaches.

A third alternative is **instant messaging** in a chat room via your PC. This is written, real time conversation via PC. A PC with the basics – monitor, keyboard – as well as Internet access is needed. Some advance planning will be required to determine the instant messaging provider you will be using and download their software, generally at no cost, to each meeting participant. Participants will use 'buddy' names, and you may want to consider selecting names that will be easy for each participant to associate with each individual. Participants will need some basic keyboarding skills to be able to keep up with the conversations,

If you do not need to meet at the same time, but need to exchange information, you have additional asynchronous options: fax, voice mail, e-mail or an e-mail mailing list.

Finally, you have Web conferencing applications and Web groupware packages such as ANGEL (A New Global Environment for Learning, Penn State's course management system). Web conferencing uses a Web browser to allow you to share presentations over the Web in real time, and includes instant messaging. However, you may need to include a conference call for voice communications. Web groupware include both synchronous tools (chat rooms, and possibly voice or video via your PC) and asynchronous tools (shared space for document access and storage) tools.

ADDITIONAL TIPS FOR VIRTUAL MEETINGS

Use this checklist as you examine the options and decide how you can increase the input to your virtual meetings without increasing your time and cost for travel.

Planning your meeting

- Select your meeting medium: Look for a fit between the individuals in the group, the size of the group, the type of meeting, the meeting format, meeting length, and the technology available.
- Keep technology as simple as possible to meet your needs, so the technology doesn't interfere or compete with the content or flow of the meeting.
- Determine in advance what, if any, technical personnel support is needed and ensure that it will be available so your meeting can start on time.
- Have a back-up plan if there are technical difficulties (this may be as simple as being ready to switch to a conference call if there are PC difficulties).
- Distribute documents: allow enough time for receipt and printing of documents, and make sure all are in hand at the start of the meeting.
- If you select an approach using your PC, Penn State's information technology security recommendations apply: use firewalls, antivirus software, and spyware protection, update your security tools, and keep your passwords secure. Do not give any personal or confidential information, especially when using your PC for a virtual meeting. Also comply with any additional PC security policies in your unit.

At the start of the meeting

- Start with a face-to-face meeting whenever possible if subsequent meetings will be virtual.
- For a one-time virtual meeting, plan on introductions of all participants if there are those who do not know each other. If they do, a "Hello" from each person will allow everyone to know who is at the meeting.
- Consider a more formal opening, moderating, periodic summarizing, record keeping, and closing to keep the meeting on track and the participants aware of progress and decisions.

- Review with those attending any guidelines for the meeting, such as stating your name when you speak (if there are those who won't recognize each others' voices), and whether you plan to take a break during the meeting.
- Let the others know if you may have to leave the meeting early, or leave and return during the meeting.
- Consider providing some indicator to those in your work area that you are in a virtual meeting, not just working at your desk, and should not be interrupted.

During the meeting

- As the group leader or facilitator, consider creating more opportunities for remote participants to speak by specifically asking them if they have comments, so you don't fall into "out of sight, out of mind" low participation.
- In a chat room, consider using easily identifiable "buddy" names, and different colors and fonts for different individuals so you can quickly tell who's talking. Also, be ready to recognize multiple responses to one comment, and moderate the discussion so each response is addressed.

Asynchronous Collaboration

- Ensure that all know and agree on the task, and when each step will be completed. Consider sending reminders, agreeing to send an announcement to all when a step is completed, or checking the central site for progress on a regular basis.

These pointers have been developed to provide you with the information you need to make the best use of technology in order to conduct successful meetings with satisfied participants. There are many ways to effectively use resources and technology to increase the exchange of information and discussion, and increase effectiveness and efficiency

FOR MORE INFORMATION

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PENN STATE UNIVERSITY WEB RESOURCES

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Information Technology Services Telecommunications and Network Services. (2005, February 15). *Videoconferencing User Services*. Retrieved February 24, 2005 from <http://tns.its.psu.edu/Services/video/video.html>

For more information, contact the Office of Planning and Institutional Assessment at 814-863-8721 or psupia@psu.edu, or visit our website: <http://www.psu.edu/president/pia>.

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