A guide to online meetings

Version 1.0 June 2020
Introduction

This guide builds on the University’s remote working resources, which we should all familiarise ourselves with. It forms part of a broader toolkit on Effective Meetings which will be published shortly.

Remote Working Resources

- Working Remotely as an Individual
- Managing Remote Teams
- Choosing the Right Digital Communication Tool

You may have participated in online meetings before, but for many members of staff this will be a new experience which comes with its own challenges and learning opportunities. Even if you have experience of remote meetings, the current context means the frequency of these has greatly increased. There are many things we can do to help make online meetings a more efficient and positive experience, and most importantly one that supports our wellbeing. Here are some quick tips and suggestions for working practices that can help combat some of the challenges we may face holding remote meetings over the coming period.

As part of the University’s new access to LinkedIn Learning you can now view more information and a range of resources on remote meetings via the LinkedIn Learning Path - UoC: Remote Working

For the latest institutional updates, policy and a set of FAQs about the University’s coronavirus response please visit the coronavirus webpages.

Contents

- Top tips for online meetings 3
- Tools and technology 4
- Top tips for a meeting chair 5
- Top tips for meeting attendees 8
- Top tips for meeting organisers 10
- Wellbeing 11
- Further resources and references 12
Top tips for online meetings

1. **Embrace video calling.** Being present and seeing each other is an important part of keeping connected. Don’t hide away or do other work during the meeting.

2. **Use headsets or earphones.** This will give better sound quality. Speak directly into the mic and remember to mute it when not speaking to limit background noise.

3. **Speak clearly and steadily.** This will help ensure everyone can understand you. And try to modulate your voice, to keep people interested and engaged.

4. **Establish etiquette guidelines.** Agree a system to give everyone a voice. Use the ‘hands up’ functionality to agree who speaks next and use chat functions to allow everyone to contribute.

5. **Repeat the question.** The chair or presenter should repeat questions they ask or before answering them, to ensure all participants are aware of the original question. Repeating the question in writing within a chat box could provide additional clarity.

6. **Use names and give context.** When responding to chat comments, repeat the relevant remarks and make clear who you’re responding to. Don’t just say ‘yes, Jane that’s right’ because others may not have seen Jane’s comment and it won’t make sense to them.

7. **Keep slides simple.** Keep to a single thought per slide to help participants understand and focus on what’s being discussed. It’s better to have more slides with fewer things on them.

8. **Keep slides visual.** Your participants may be joining from a mobile device and wordy slides will be tough to read. Anchor your presentation on relevant, image-based slides.

9. **Engage participants regularly.** It’s hard to simply listen online for a long time. Invite participants to give comments or ask questions, and use tools like chat or polls.

10. **Be explicit about actions and summarise.** Spell out clearly any actions that need to be taken and by whom. Summarise meeting takeaways and circulate notes promptly.

Source: [https://www.cipd.co.uk/knowledge/fundamentals/relations/remote-working-top-tips](https://www.cipd.co.uk/knowledge/fundamentals/relations/remote-working-top-tips)
Tools and technology

Whilst there are many options for hosting online meetings, this guide will focus on Microsoft Teams as the University’s preferred platform. In terms of accessibility Microsoft Teams currently has more benefits to support disabled users than other videoconferencing platform (as identified by a recent assessment conducted by the Disability Resource Centre). For more information regarding Teams accessibility features please read this useful resource.

Our colleagues in UIS have created a Teams Hub where you can get lots of very helpful top tips and detailed guidance on how to run effective meetings in Teams. This also includes best practice for meetings with 20 people or more. We have highlighted three top tips below:

1. **Share content during a meeting**: Share your entire screen, just a window, a PowerPoint presentation, or a whiteboard. You can also share your system audio, and give/take control of the content being shared.

2. **Blur or custom your video background**: when you're in a video meeting, you can blur the background to obscure your surroundings to preserve your privacy or set a custom background.

3. **Take meeting notes during a meeting**: Meeting notes are a great place to capture and share notes before, during, and after a Teams meeting.
Top tips for a meeting chair

Remote meetings don’t have to be more challenging than the traditional face-to-face meeting. To help make them a positive experience for all attendees, and one which meets your objectives, we have included some top tips below. Whilst many of these are important for all meeting types, doing these well will have an even greater impact when the meeting is held virtually.

Before the meeting

Do you need to hold a meeting?
Before organising a meeting, consider whether the outcomes and aims could be achieved without holding a formal meeting. This could include a one-to-one phone call, emailing a document for review/feedback, or having an informal discussion on Microsoft Teams. This ‘Should we have a meeting’ decision tree is a useful tool for determining if a meeting is required.

Decide why you want to meet and the aims of the meeting
Pre-determine why you want to hold the meeting, and what a successful meeting would look like to you. For example, agree final changes to the launch event, or determine who will be leading on each section of the project plan.

Send out an agenda before the meeting
If you have decided a meeting is needed, include the aims of the meeting in the agenda and send to attendees before the meeting. Identify and pre-warn those who will lead the discussion for each agenda item. Be sure to upload the agenda onto Microsoft Teams so it can be referred to throughout the meeting. It is worth noting that some things can take longer in remote meetings, so it may be worth getting a colleague to look through the time allocated to agenda items before sending it onto attendees. Depending on the meeting, the agenda will vary in length, content and format. Sending it out beforehand empowers attendees to:

- Determine if they need to be at the meeting, or if attendance could be delegated
- Prepare for the meeting with questions/comments
- Focus on the meeting

Familiarise yourself with the software
Hold a practice call with a colleague to make sure you are familiar with the software features. Whilst this guide focuses on Microsoft Teams, it is important to note that each videoconferencing platform is unique in terms of layout, design and accessibility features. Make sure you have familiarised yourself with these prior to holding the meeting.
Assign a note-taker
Decide who you would like to take notes during the meeting and discuss the role with them. One way of doing this is to use meeting notes in Microsoft Teams. Meeting notes are a great place to capture and share notes before, during, and after a Teams meeting. As chair, your skills are best placed in facilitating and directing the meeting – you will not be able to do this as efficiently if you’re trying to take notes at the same time.

During the meeting

Agree meeting etiquette
This is particularly important for remote meetings. Agree for the meeting whether anyone not talking can turn off their camera or not. Or, if in a long meeting, if it is okay for people to turn off their cameras for part of the call. Agree on whether microphones will be muted and how attendees will ask questions (e.g. through a virtual raising your hand). This could include using the live chat function - assign a colleague to monitor the chat screen and bring any important comments/questions to your attention. You could also use the whiteboard as a holding space to note questions or comments that are not specific to the discussed agenda item, but should be reviewed. Be sure to come back to these at the end of meeting. When using chat and other instant messaging functionalities it is important to be mindful of any misunderstanding that might occur. It is easier for this to happen in text format, especially for non-native speakers, as it is hard to get a sense of the sender’s tone. The English language can be very ambiguous at times. Emojis also need to be used with caution, and it is important to note that certain emojis can have culturally specific meanings. In your role as Chair, follow up any chat conversations you are concerned may have been misunderstood after the meeting with a one-on-one call.

Record the meeting
A great asset of remote meetings is the ability to record in real time. This is a particularly good approach if a colleague is unable to attend the meeting, as you can share the recording with them afterwards. If you would like to record the meeting make sure this is seen as an optional approach, and check at the start of the meeting if everyone consents to the meeting being recorded. It may be that the assigned note taker decides to record the meeting and uses the transcript as a foundation to write notes and actions after the meeting.

Engage attendees
People perform better and are more likely to contribute when they feel relaxed and engaged. Ensure everyone is connected to Microsoft Teams and can see/hear each other.
- Your role as Chair is to introduce attendees and ascertain what they want to gain from the meeting. One way to ensure attendees remain engaged is to allocate each attendee a slot on the agenda, or assign the 3-minute rule (don’t listen to one person for any longer than 3 minutes and after they have finished...
speaking, invite someone else to ‘playback’ what they have understood, ask any questions for clarity, and invite the initial speaker to confirm the summary, or clarify their meaning).

- In virtual meetings you will need to wait longer for input. In remote meetings it is harder for attendees to use the body language and non-verbal cues needed to ascertain the best time to contribute. To encourage feedback and ensure engaged attendees, pause and wait longer for a response.
- Ask specific attendees for their feedback. In virtual meetings attendees can be less likely to contribute as they don’t want to interrupt or speak over the top of each other. Ask specific questions to attendees and encourage all to contribute.

**End with actions**

Before the meeting ends summarise the key action points - this is a key time to refer back to the agenda. Make sure everyone knows and agrees the actions to take forward, including who each action has been allocated to each and the time frame for completion.

---

**Miro** is a virtual whiteboard tool which can be used to capture ideas and content in meetings and workshop formats. It is available for free using an education license.

---

**After the meeting**

- Ensure meeting notes and action points are circulated in a timely manner following the meeting.
- Ask for feedback and ideas on how to make future meetings more successful and effective.
Top tips for meeting attendees

Many of us are experienced at participating in meetings. Whilst these may vary in size and format, virtual meetings are now common practice. The skills and techniques applied to face-to-face meetings can be transferred to remote meetings, with some additional top-tips below. Participating in meetings can help you share and develop your ideas, gain clarification and commitment to your project and build your networks across the University.

Before the meeting

- Be sure to read the agenda and any accompanying documents. Come prepared with any questions you may have or points you may wish to clarify. Think about what you would like to gain from the meeting, and how you will get your questions answered.
- Have the documents you need readily accessible - whether these are in hard copy or uploaded onto Microsoft Teams.
- Make sure you have access to the meeting in Microsoft Teams and check that your microphone and camera are working. Close down any internet tabs, browsers or documents you will not need during the meeting and stop any automatic notifications. It can be distracting if an email notification pops up on your screen in the middle of the meeting.
- Whilst this guide focuses on Microsoft Teams, it is important to note that each videoconferencing platform is unique in terms of layout, design and accessibility features. Make sure you have familiarised yourself with these before the meeting takes place.
- It is good practice to join the meeting a few minutes before it starts. This gives time to ensure everything is working, but also provides a valuable opportunity to have an informal chat with your colleagues – something you may be missing out on when working remotely.

Remember that you can blur or change your background in Microsoft Teams. This is particularly helpful if you are working in a communal space, or have items in your background you would prefer attendees not to see.
**During the meeting**

Participating in a virtual meeting can be a different experience to the more practiced face-to-face format. It is harder to read attendees’ body language, pick up on non-verbal cues and there can sometimes be a slight time delay - all these things can take a while to get used to. To help with this we have included some top tips below:

- Speak clearly and concisely. If there is a particular colleague you are addressing, or you think would be able to answer your question, refer to their name when you start speaking.

- Wait longer for a response and pause before going onto your next point.

- Follow the agreed meeting etiquette when you want to raise a point or ask a question - remember to unmute your microphone before you speak. The chat and whiteboard function are a great resource when used appropriately.

- When using chat and other instant messaging functionalities it is important to be mindful of any misunderstanding that might occur. It is easier for this to happen in text format, especially for non-native speakers, as it is hard to get a sense of the sender’s tone. The English language can be very ambiguous at times. Emojis also need to be used with caution, and it is important to note that certain emojis can have culturally specific meanings.

- Keep your points snappy. Start them with ‘I would like to add…’ or ‘Can I say…’. Avoid starting with an apology, such as ‘I’m sorry but...’ as this tone can reduce the impact of what you are trying to say.

- Take notes as necessary in the format you find most helpful - you could use meeting notes in Microsoft Teams. Before the meeting concludes refer back to the notes you made on what you wanted to gain from the meeting. If you don’t have the answers you need, the AOB agenda item can be a great opportunity to ask your questions or seek any further clarification.

**After the meeting**

- Ensure the action points assigned to you are completed and you have updated the Chair as appropriate.

- Provide any feedback and ideas you may have on how to make future meetings more successful and effective.
Top tips for meeting organisers

Our colleagues in the Leadership Community of Practice have written a great series of ‘8 simple tips for scheduling meetings’. The top three key points are:

1. Check people’s calendars for availability.

2. Make sure you only invite people who need to be there.

3. Try to avoid Monday mornings and Friday afternoons if possible.

We have added some additional ideas below:

- Try to ensure attendees are not booked into back-to-back meetings. Allow the space you would normally allocate as travel time for attendees to gather their thoughts, have a comfort break and prepare for the next meeting.

Instead of meetings starting on the hour or half-hour mark you could try starting them at 5 minutes or 35 minutes past but finish at the standard time of on the hour or half-hour. Since it can be irritating to schedule meetings starting at what most calendaring software regards as ‘odd’ times - and it's easy to forget to manually adjust the meeting times you could adopt the etiquette that all meetings actually start 5 minutes after the scheduled time to give attendees time to have a comfort break, arrive, get a drink and settle down.

Alternatively, instead of booking a meeting for one hour, you could try 45 minutes.

- Encourage part time staff to ensure their calendar and email signature includes the hours they are in the office and available.
Wellbeing

At the forefront of the University’s messages during this time is the health and wellbeing of its staff. The message from our senior University leadership is clear:

“When anxiety is high, when personal plans have been disrupted, and when worries about our health are paramount, the kindness of fellow staff and students can make an enormous difference. We are a decent and caring University community. I am certain that, with each other’s support, we will get through what may become a difficult period.”
– Professor Stephen J Toope, Vice-Chancellor 5 March 2020

We are currently spending an increased amount of our time online, and not just during remote meetings. Whilst we may have previously called a friend or colleague, this is now often replaced with the use of online platforms to video call and chat. The result of which is a new phenomenon known as Zoom fatigue. A day of remote meetings and video calls can leave you feeling drained and fatigued. Zoom fatigue is caused by; having to focus and concentrate harder to absorb the same amount of information remotely, a possible desire to multi-task during the meeting, and the psychology behind how we process information over a video call.

The Harvard Business review have listed five research-based tips on how to reduce Zoom fatigue:

1. Avoid multi-tasking

2. Build in breaks

3. Reduce on-screen stimuli

4. Make virtual social events opt-in

5. Switch to phone calls or emails

As noted above another key element to increasing wellbeing when attending meetings is try to ensure you do not book yourself or a colleague into back-to-back meetings. Allow the space you would normally allocate as travel time to gather your thoughts, have a comfort break and prepare for the next meeting. If your meeting is a 1-to-1 why not consider a phone call rather than a Teams meeting.
Further resources and references

### University of Cambridge

- Working Remotely as an Individual
- Managing Remote Teams
- Choosing the Right Digital Communication Tool
- Microsoft Teams at Cambridge Hub
- Eight Simple Tips for Scheduling Meetings
- Minute taking online
- Presentation skills online
- Key Principles of Effective Meetings
- Microsoft Teams Meetings tips - Cambridge University Libraries
- Video Conferencing Accessibility Assessment

### External resources

- LinkedIn Learning – Leading Virtual Meetings
- Harvard Business Review – How to run a great virtual meeting
- Harvard Business Review – What it takes to run a great virtual meeting
- Harvard Business Review – How to Combat Zoom Fatigue
- 3c Training – How to Manage Conference Calls and Online Meetings
- OpenLearn – Effective Communication in the workplace: Participating in Meetings
- BBC – Why Zoom Video Chats are so Exhausting
- Association of Chairs - Top tips: board meetings during coronavirus crisis

This guide is a first iteration and will be added to and amended as we build a bigger ‘Effective Meetings’ toolkit. If you have any suggestions or feedback on this guide, please email ourcambridge@admin.cam.ac.uk.

Find this guide useful? Please do let us know, so we can ensure we are producing valuable information and making a positive impact.