

## Effective Virtual Meetings and Teams

Teams of all kinds face a number of challenges when they cover a large geographical area. Among other issues, their face-to-face interactions can be restricted as the cost of travel increases. There are some technology solutions available to help stake and ward leaders decrease those travel costs, but they present their own challenges. This document provides some suggestions to help local leaders deal with these challenges as they move to a more virtual leadership model. As the technology recommendations for local units change, this document will be updated to include the use of those technologies.

### Guidelines and Tips

Explicitly define how work will get done and how communications and meetings will occur. Create a document that outlines the processes and procedures. A sample definition might appear as follows:

The group will meet face-to-face once per quarter. It is expected that all will make the sacrifice to travel to that one meeting. All other regularly scheduled meetings will be held in an audio bridge meeting. Members will dial in to that meeting from their home. They will not use a cordless phone. They will be alone in a room with the door closed to ensure lack of interruptions, to minimize distractions, and to preserve confidentiality. The meeting organizer will ensure that all members participate in the meeting. Members agree to speak up and participate even if they are uncomfortable with the technology or not seeing body language as sensitive subjects are discussed. If any meeting requires the sharing of a document or presentation, that meeting will be conducted using WebEx (an alternative tool would be Live Meeting; alternative methods could include e-mailing the document to all participants 24 hours before the meeting or mailing the document one week before the meeting).

Meetings will start and end on time. Those unable to attend must notify the organizer prior to the meeting. There will be an agenda for each meeting. The agenda will be shared at the start of each meeting. All assignments from the meeting will be tracked. Members will report on the results of assignments and provide any status updates as a standing agenda item.

All non-meeting communications will be by phone. Each member must have a working telephone with an answering machine or voice mail. Each member must check that voice mail daily and respond as needed to messages (an alternative could be the use of e-mail with the same kinds of rules).

Since you will not be meeting face-to-face as often, miscommunication is much easier. Having clearly defined ground rules for communications helps decrease the likelihood of miscommunication and helps improve the development of your team as a virtual team.

Define which technology will be used in which cases. Use the communication methods that best fit the situation. In the sample, we see that there are technology solutions when you need to share a document, but sometimes they could just be process solutions. If your team members cannot access a Web conference, they could use e-mail. If they cannot use e-mail, you could send out the document in

advance through regular mail. The important point is to define what the process is and always follow that defined process. The predictability helps all team members become comfortable with the virtual work that is going on.

For people who are not accustomed to virtual meetings, meeting facilitation is critical to the success of the meeting. The facilitator must encourage all to participate. It may help to assign someone other than the meeting organizer to monitor participation and draw in someone who does not participate due to discomfort with the technology. That way the meeting organizer can concentrate on running the meeting, not on ensuring the participation of everyone in the call. It is much harder to ensure full participation when many are in one room together and only one or two are on the phone. The meeting leader must work harder to ensure full engagement by those not in the room. For business, the optimal solution is for all to be on the phone so that all face the same limitations. This may not be practical in Church settings, but the meeting leader should keep in mind the severe limitations this places on those not in the room and foster participation accordingly.

The leader must be the role model in using the technology in order to build confidence in team members. This means the stake president must be a strong proponent of the use of technology to hold the virtual meetings.

Use meeting best practices: Always have an agenda and/or objective for the meeting. Have any documents for sharing ready in advance—uploaded to the Web meeting if appropriate prior to or at the start of the meeting. Start on time. End on time. Ensure that individuals provide notice in advance if unable to attend so the rest do not have to wait for that person. Minimize distractions. If participating from home, members should be in a room with the door shut. No interruptions should be allowed. Participants should not do other work during the meeting (such as reading e-mails, paying bills, and so on).

Someone must be able to support team members if they have problems using the technology. Phone support will likely be provided by the local telephone service provider. The stake technology specialist must be able to support any other technologies. These might be a computer, a Web camera, software for the Web, or video conferencing. ICS will provide self-help training material for stake technology specialists to help them improve their skills in these areas. All members need basic understanding of how to use the technology for the meeting. This understanding might come from a simple instruction document or practice using the technology.