Videoconference Etiquette Guide

Holding effective meetings by videoconference requires special skills and perhaps even some new habits. This guide recommends some specific strategies to help you build your videoconference repertoire. As your experience and skills continue to improve, we're sure you'll come up with even more ideas.

RESOURCES AND TOOLS:

1.   **Training Video - BSO OTN Videoconferencing Etiquette**
     - A before and after look at how to improve videoconferences as both a participant and moderator.

     How to use it
     - As you watch the video, use the **Videoconferencing Strategies and Skills Checklist** or **Videoconference Quick Checklist** to identify your strengths and areas you'd like to improve.
     - Watch the video as a self-directed learning opportunity.
     - Watch the video in a team meeting. To make it a fun learning opportunity, bring some popcorn and during the "before" section of the video ask people to watch for things they've experienced in videoconferences (without naming names). Ask for people's input into what would make their videoconference experiences better and what as a team everyone will commit to.
     - Make the video and other support tools in this guide part of your orientation package.
     - Include videoconferencing skills in performance/professional development plans.
     - Encourage your team members and members of groups that regularly meet by OTN (e.g. VTN, Geriatric Co-operatives, Long-Term Care Home Managers, Alzheimer Society project groups) to view the video.
     - Get new groups off to a good start by asking group members to watch the video and develop a set of ground rules. See Moderator Tools for more details.

2.   Videoconference Quick Checklist
     - A short reminder of basic videoconference etiquette. *See page 3.*

     How to use it
     o Place the checklist in a plastic sleeve or in a binder on the OTN cart for easy access.
     o Keep the checklist in front of you during videoconferences as a reminder during meetings.

3. Common Videoconferencing Complaints and Fixes
- Solutions to common conundrums of videoconference participants. *See page 4.*

<u>How to use it</u>
- If you're new to videoconferencing, prefer in-person meeting or are frustrated by some aspects of virtual meeting, check our pet peeves list to see if there are solutions that meet your needs.
- Ask your team to come up with additional ideas about how to overcome videoconference challenges.

4. Videoconference Strategies and Skills Checklist - Participants
- Practical tips about how to be a polite and active participant. *See page 7.*

<u>How to use it</u>
- Keep the checklist in front of you during videoconferences as a reminder during meetings. Each meeting, challenge yourself to focus on 1 skill/strategy that you'd like to improve.
- Use this as an orientation tool for new staff members who may be unfamiliar with videoconferencing or who previously may not have received any guidance about how to effectively participate.
- Challenge your team members who join you on videoconferences to tally up how many things you collectively do well during each meeting.

5. Videoconference Moderator Checklist and Tools
- Practical strategies for planning and facilitating meetings by OTN. *See page 8.*

<u>How to use it</u>
- Keep these handy for self-direct learning.
- Refer to the tips and resources when you want to give your skills a boost or when faced with a new challenge.
- Include enhancement of your videoconferencing skills in your professional development plan.
- Find a colleague who shares this development need and coach each other.
- Focus on one or two ideas at a time rather than taking on too many at once.
- Try the Facilitator Tips Tool when you face a certain challenge and you want to know what to do and what to say.

OTN Resources Available:
https://otn.ca/sites/default/files/vc_event_organizer_checklist.pdf
https://otn.ca/sites/default/files/vc_etiquette_guidelines.pdf

Videoconference Quick Checklist

Get Ready

☐ Arrive at least 10 minutes before the start time.

☐ Ensure the OTN equipment is turned on and working properly.

    ☐ Call OTN Service Desk (1 866 454-6861)

☐ Adjust the lighting in the room.

☐ Remote reminder. Find mute button.

☐ Frame yourself/ the group.

☐ Put all devices away.

☐ Go off camera to adjust clothes, hair, etc.

During the Meeting

☐ Introduce yourself before speaking.

☐ Look at the screen.

☐ Speak clearly and do not put your fingers in front of your face.

☐ Use the mute button when you're not speaking.

☐ Be polite and respectful.

☐ Mind your body language.

Common Videoconference Complaints and Fixes

Complaints	Fixes	✔ What you'll try
It is so impersonal	*Think about the reasons why it seems detached compared to in-person meetings. What's missing for you? Social interaction, ability to see people well, harder to read people?* Allow time at the beginning of meetings for social chatting* Build time in agendas for updates and recognition* Make it easier to see people - remind everyone to adjust the room lighting and frame themselves like a news anchor When there are large groups, encourage someone at each site to learn how to use the pre-sets on the remote to switch between the full group view and individual presenters	
Hard to get a read on people	*It can be more difficult to get a sense of the energy around the virtual table, gauge people's level of engagement and interpret body language.* Ask questions to check-in.* Check your assumptions.* Take accountability to share how you're feeling. This makes it safer for others to do the same*	
People don't take it as seriously as other meetings.	*Some people may not feel the same level of accountability as when they attend in-person meetings. They may feel that they can hide behind the technology.* Send the agenda in advance. Include a special note to people who are presenting information or who were to follow-up from a previous meeting. Indicate topics or questions that people need to think about in advance.* Be clear about the purpose of each meeting and the importance of participation.*	
People are distracted	*People checking email or working on other projects has become a challenge at all type of meetings. On videoconferences, some folks forget that others can see them.* Set ground rules that include putting devices away. Invite participants to share at the beginning of meetings if they might have to respond to a page or urgent situation.	

	If you notice someone on a device politely ask if they are working are an urgent matter or if they can join you. Be a good role model, and keep your devices off and away. Be fully present – if you're at a meeting, really be there.	
It is hard to get things done	*Many groups struggle with moving from ideas to action. Facilitation techniques and basic project management tools can help groups understand their role.* Be clear about the purpose of the initiative and the scope. Develop a timeline and get clear about who is accountable for what. Create meeting agendas that line-up with the actions required. Be realistic about what can be accomplished in a 1 hour meeting. Emails, calls and/or videoconferencing between main meetings may be needed to keep things on track. Break into sub-groups/ action teams so that progress can be made by a few committed people. At the end of each meeting wrap-up by stating who will do what, by when.	
I find it easier to work with people I've met in person	*If the only time you connect with certain people is by videoconference it is a challenge to get to know people and make a personal connection. Some of the ideas below may seem like they'll take additional time – which is true – and they may save you time in the long-run and enhance your work relationships.* Call or set up short videoconferences to introduce yourself to each team member. Share something about your professional and personal life; and invite them to do the same. Call to ask for advice or get more background information on a project. If you're going to be at an in-person conference or workshop make a list of who you want to connect with in person. Make arrangements to meet up at break or lunch time.	

Some people are rude; some take over meetings and some don't contribute anything	*Videoconference etiquette is a new way of thinking for some people and they made need prompts and coaching to help them develop new habits.* Be proactive. Set ground rules.* It is then up to members of the group to hold themselves and each other accountable. Use facilitation techniques to help keep people on track and encourage participation.* It may be a good idea to call people who don't contribute to ask the reasons for this and what you can do to create a more comfortable virtual setting.* When rude behaviour does not change, try techniques from Crucial Conversations**	
Training is boring	*It is possible to create meaningful, interactive learning experiences using videoconferencing.*	

* See Moderator Checklist and Tools
** https://www.vitalsmarts.com/crucialconversations/

Videoconference Strategies and Skills Checklist - Participants

Get Ready

☐ Review the agenda and identify questions, points to raise, resources, etc.

☐ Prepare to present the sections you're responsible for (**See Moderator Checklist)**

☐ Arrive at least 10 minutes before the start time.

☐ Ensure the OTN equipment is turned on and working properly.

  ☐ Call OTN Service Desk (1 866 454-6861) if there are any problems.

☐ Adjust the lighting in the room so that you can be well seen by others.

☐ Reacquaint yourself with the remote if you haven't used it in awhile.

  ☐ Make sure you can easily find the mute button.

☐ Frame yourself like a TV news anchor or if others are joining you, position yourselves and the camera so everyone can be seen.

☐ Turn off your phone.

  ☐ If you must leave your phone on (e.g. you're on call), place your phone at least 30 cm away from the microphone.

☐ Go off camera to adjust clothes, hair, etc.

☐ Unless you need it for the meeting, put away your device (e.g. laptop, tablet).

During the Meeting

☐ If the group is new, introduce yourself before speaking.

☐ Look at the screen while speaking.

☐ Try to be natural and use hand gestures just like you would when meeting in person

☐ Speak clearly and do not put your fingers in front of your face.

☐ Use the mute button when you're not speaking.

☐ If the moderator asks a question, and you don't have anything to contribute, say "I don't have anything else to add to the conversation" rather than just be silent.

☐ Jot down notes of items you want to share so that when it is your turn you can get your point across clearly and concisely.

☐ Respect the timeframes for discussion. If you didn't get a chance to share all your ideas, send an email to the group members following the meeting.

☐ Be polite and respectful. Give your full attention to the meeting – do not check your phone or do other work.

☐ Mind your body language. In some cases it is more difficult to pick up on social cues (e.g. tone of voice) during videoconferences and in other cases body language (e.g. sighing and arms crossed) may seem more exaggerated. If you're frustrated, explain why. If you're unsure about someone else's reaction, ask for clarification rather than making assumptions.

Videoconference Moderator Checklist and Tools

Get Ready

☐ Plan to spend at least as much time preparing for each meeting as moderating it. Block time in your schedule at least 1 week before the meeting. Your preparations will pay huge dividends in terms of having effective, productive and less stress meetings.

☐ Create a detailed agenda (See **Videoconference Agenda Template Tool)** that includes what needs to be accomplished, topics and a detailed time breakdown.

☐ Send out the agenda in advance and highlight who is expected to give a presentation or moderate a discussion.

☐ Identify anyone who you need to connect with before the meeting to ensure they are on track or require some coaching support

☐ Prepare to present the sections you're responsible for

> ☐ If you're using slides, do a quick test run to make sure you know how to hook up the laptop, and use the remote to switch between presenter and slides

> ☐ *S*end pre-reading and questions about items you'd like people to think about in advance

☐ If you expect any "hot topics" come up with a plan about how to handle them. This may include asking for support from a colleague; and thinking about tough questions that may be asked and how you'll respond.

☐ Decide if it would be helpful to have someone else take notes so that you can focus on moderating the meeting.

☐ Print out a copy of the Ncompass event so you have the event # and list of a sites registered for the event. This list can be used for the check-in for participating sites.

During the Meeting

☐ As sites join, do a site check-in and ask them to resolve issues such as framing, lighting and audio. If they cannot quickly resolve technical issues, ask them to call the OTN Service Desk (1866 454-6861). If you have added an audio line to your event, ask for any audio only participants to identify themselves.

☐ Do round table introductions. (**See Facilitation Tips Tool)**

☐ Introduce the purpose of the meeting and the agenda.

☐ Remind participants about the ground rules. (**See Ground Rules Tool**)

☐ Guide the discussion and keep your eye on the time. (**See Facilitation Tips Tool**)

☐ End the meeting by recapping the action items (who will do what by when).

☐ Thank the participants and provide some feedback about what went well.

After the Meeting

☐ Spend a few minutes reflecting on what went well and what you'd like to focus on next time. Summarize your follow-up actions.

Videoconference Agenda Template Tool

Date:
Time:
OTN Meeting #:

Purpose of meeting:
[Consider what the group needs to share, discuss, decide, plan]
[By the end of this meeting we will have accomplished ….]

Resources to Distribute and/or Make Available during the Meeting (e.g. Pre-reading
Pre-questions, Link to website, Meeting notes, Recommendations, Notice)

Time	Topic	Who	Resources/Notes
10-15 minutes before start time	Set-up OTN Equipment, Slides, etc.	All sites Moderator – site check-in	
5 minutes	Welcome Review purpose, agenda and ground rules	Moderator	Notes from Previous Meeting Agenda
10 minutes	Introductions & Setting the Stage for Collaborative Work	Moderator	
15 minutes (5 min. presentation or update 10 min. discussion)	Topic A	Topic A Action Team Lead	
15 minutes (5 min. presentation or update 10 min. discussion)	Topic B	Topic B Action Team Lead	
10 minutes	Updates from Participants	Moderator	
5 minutes	Recap action items Provide feedback about what went well	Moderator	

Videoconference round Rules Tool

The purpose of ground rules or group agreements is to help groups identify principles and ways of behaving that will govern their interactions and how they work together.

By making them explicit, ground rules become "rules of the road" that everyone understands and commits to follow. Ground rules clarify expectations, reduce conflict and misunderstandings, and help videoconference moderators and participants hold each other accountable. It provides new comers with a picture of the meeting culture.

It is often helpful to present some choices for group members to select from rather than to start from scratch. Try to keep the ground rules to 3-5 items. They should be periodically reviewed to see what can come off the list because they are no longer needed as a reminder because habits are solid (e.g. everyone puts their phones away) and as new challenges emerge (e.g. eating at meetings).

Here are some ideas to get you started.

- Start and end on time.
- Be polite and courteous.
- Follow good etiquette – take care of personal matters off camera.
- Follow good etiquette – framing and lighting.
- One person speaks at a time.
- Put devices away.
- Use mute when you're not speaking.
- Pay attention to the agenda timeframes.
- Come to meetings prepared. Review agenda. Share resources.
- Speak up when you have a question or concern.
- Respect different perspectives.
- Eating and drinking are allowed.
- Eating is not allowed.
- No side bar conversations.

Videoconference Facilitation Tips Tool

If you want to …	Then …	Examples of what to say …
Make video conferences more personal		
Be clear about the purpose of each meeting and the importance of participation.	▪ At the top of meeting agendas include what needs to be accomplished; be clear about what needs to be shared, discussed, decided and planned.	*"I realize that this is a particularly hectic week with budgets due and we really need everyone's attention and brain power to come up with a solid plan for next year."*
Get a better read on how people are feeling	▪ Delegate note taking to someone else so you can focus on facilitating and noticing group dynamics	*"I asked Susan to take the notes today so I can really focus on the discussion."*
	▪ Ask more open ended questions	*Instead of: "Are there any concerns?"* *"What do you see as the benefits of this recommendation?"* *"What concerns do you think staff might have about this?"*
	▪ Check in regularly	*"I'd like to check in with everyone before we move on. On a scale of 1-10 how enthusiastic are you about the progress made? And why?*
	▪ Go around the virtual table and ask for contributions from each site and/or person	*"It is really important that we hear from everyone. Let's go to each site – tell us what you agree with and what questions you have. Grand Bend please go first."*
	▪ Call what you notice in a respectful way.	*"It seems that some folks are frustrated, let's take a few minutes to discuss what's going on before we make a final decision."*
	▪ Make it safe for people to share what they notice.	*"I'm tired today because I was up all night with a sick kid so I apologize if I seem distracted." "I feel that we've been spinning our wheels and not making progress for the past 3 months; and I have a suggestion. But before I share it, is anyone else feeling this way?"*

Get a better read on how people are feeling (continued)	▪ Check your assumptions.	*"I see that the folks in Pleasantville are having a side conversation – do you disagree with the plan?"* *"Sorry about that no. There's a code for a missing patient – we're sorting out who needs to go and who can stay in the meeting."*
Encourage everyone to participate	▪ Provide materials and questions in advance so people who prefer to think before speaking have time to ponder. ▪ Go around the virtual table in a systematic way. ▪ If you know there are people whose strength is to sit back and listen, and then make a contribution, ask them to go last.	*"We sent around a proposal and some questions in advance to give you some thinking time, who would like to start with their feedback?" …. "Great I think we've heard from all sites except, Chelsea. What would you like to add?"*
Keep the meeting dominators in check	▪ At the start of each agenda topic remind the group about how much time is available. ▪ Politely ask the person to wrap-up so others have a chance to contribute. ▪ Invite people who didn't have a chance to share everything to send an email after the meeting and include their ideas in the meeting notes. ▪ You may need to have a conversation outside the videoconference.	*"I'm sorry to interrupt but we only have 2 minutes left and we haven't heard from everyone. Could you please wrap-up your final point."* *"I realize that we ran short of time so please email me your ideas and we'll include them in the notes."*
Get more done in meetings	▪ Reduce the number of agenda topics. ▪ Limit the time spent on updates that can be shared via email. ▪ Focus on what needs to be done together. Identifying what can be done independently and/or by email. ▪ Be clear about the purpose of each topic on the agenda (e.g. discussion, decision, education). ▪ Make "who will do what by when your mantra" so every	*"I'd like to thank Brad and Vera for the work they did to bring this proposal to the meeting. So that we keep our momentum there are 2 things we must achieve between now and our next meeting. Rita, early you said you're interested in the communication piece – is this something you can commit to?"*

	- action item is clear. - Encourage touch base points in between meetings. - Provide regular reminders about the timeline; actions completed; and what's left to do. - Offer suggestions for people to respond to rather than generating ideas from scratch. - Set time limits for brainstorming and discussions; and then moving to action planning. - Provide positive feedback and recognition to people who do get things done.	
Address poor etiquette or ground rule infractions	- Include the ground rules at the top of the agenda and referring to them at the start of each meeting. - Remind people about a specific ground rule when things go off-side.	*"Excuse me, I'd just like to remind everyone about our ground rule about checking the room lighting. "* *If no change: "Excuse me Larry, we cannot see you because it is very dark. Can you please turn the lights on?"*