THE
INVISIBLE
MEETING

*How productive was
your last conference call?*

CONTENTS

The point is that conference calls have to be taken every bit as seriously as face-to-face meetings.

- Stephen Matola

How productive was your last conference call?   As more and more people begin to work from remote locations, the number of "over the phone" meetings is increasing dramatically. Unfortunately, many people have not yet learned the skills needed to make this type of meeting effective. We have all participated in ineffective conference calls, wasting everyone's time and energy. Often participants don't take a conference call as seriously as a regular meeting, but in reality, a conference call **is** a meeting—a "virtual meeting" with some very unique challenges.

"**The Invisible Meeting**" demonstrates 6 effective techniques for making your conference calls more productive. This engaging program demonstrates the "challenges" and the "virtual rules" that both participants and meeting organizers need to know.   "The Invisible Meeting" will make your conference calls more effective, saving your organization time and money.

HOW TO USE THIS GUIDE

This program is suitable for group training as well as self study. Before beginning any training, take time to read through the entire guide. If you are planning a workshop, take special note of the **Preparing for the Workshop** section. The **Planning Considerations** and **Suggested Group Workshop** sections will help you determine your workshop agenda. All worksheets contained within the guide work for both groups and individuals. Instructions for both are given (as needed) at the beginning of each worksheet. This program may also be licensed for online training using video streaming. To obtain digital video rights, contact Video Visions. Phone: 800-929-3355 or email: info@videovisions.net

You will also find a copy of this leader's guide in PDF format on the enclosed CD-ROM. The leader's guide contains all the participant worksheets. Also included on this CD-ROM is a separate PDF file with just the participant worksheets. Use this file to easily print out copies of the worksheets as needed.

The graphic layouts, located at the end of this guide may be presented in a number of ways:

■ Video projection ■ TV monitor ■ Overheads ■ Flip charts ■ Handouts

For example, you can use the DVD to present the graphics onto your monitor by selecting the "Graphics" button on the DVD's main menu. Another option is to use the PowerPoint file on the enclosed CD-ROM and display the graphics using your laptop attached to a video projector. The PowerPoint file may be edited as needed; for example, you could add your company's logo or other additional content specific to your organization.

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1. Challenge:		Virtual Rule:
COORDINATION	⇨	**CYBER COORDINATE**

- Use scheduling software (when available)
- Consider time zones
- Provide agenda and necessary materials in advance
- Get confirmation

2. Challenge:		Virtual Rule:
DISTRACTIONS	⇨	**MINIMIZE NOISE**

- Don't multitask
- Find a place conducive to paying attention
- Use your mute button
- Keep meetings short and focused

3. Challenge:		Virtual Rule:
SURPRISE GUESTS	⇨	**ANNOUNCE - ALWAYS**

- Announce everyone at the start of a meeting
- Announce as people come and go

4. Challenge:		Virtual Rule:
MISSED BODY LANGUAGE	⇨	**GET VERBAL FEEDBACK**

- Probe for responses from all participants
- Conduct a poll on major decisions
- Create an atmosphere where people are comfortable speaking up

5. Challenge:		Virtual Rule:
MISUNDERSTANDING	⇨	**USE CLEAR LANGUAGE**

- Avoid jargon and idioms
- Ask for clarification

6. Challenge:		Virtual Rule:
ISOLATION	⇨	**BE A TEAM**

- Acknowledge accomplishments
- Take time for informal conversation
- Contact participants individually

TRAINING APPLICATIONS

This program is intended for training on <u>conference calls, virtual meetings, or virtual teams</u> and would benefit:

- **Managers**
- **Supervisors**
- **Team leaders**
- **Team members**

1. **Know Your Audience**
   Understand the training needs of your audience and target your training accordingly.

2. **Determine Objectives**
   Determine the objectives of your training session, considering your audience and their needs.

3. **View Video**
   Watch the program. Note situations that relate directly to your audience.

4. **Prepare Environment**
   Reserve a comfortable room with easy access for viewing the video and for small and large group discussions.

5. **Prepare Materials**
   Use the Training Leader's Checklist to prepare PowerPoint slides and/or overheads and flip charts. Print or photocopy all participant worksheets.

6. **Check All Presentation Equipment**
   Test all audio and visual equipment **well before** the training session begins. At the beginning of the session, make sure everyone can see and hear the presentation.

7. **Send Out Invitations to Participants**
   A sample letter is provided for your use.

TRAINING LEADER'S CHECKLIST

1. **Reserve an appropriate location with:**
   ___ Comfortable seating ___ Easy viewing of visuals
   ___ Good lighting   ___ Adequate writing surface for participants
   ___ Good acoustics   ___ Accommodations for participants with disabilities

2. **Make sure all equipment is working by:**
   ___ Playing the video to make sure the player, monitor, and sound are functional
   ___ Checking overhead projector, laptop computer and any additional equipment

3. **Organize and prepare all materials, including:**
   ___ Training Leader's Guide ___ PowerPoint slides, overheads or flip charts
   ___ Paper and pencils   ___ Worksheets photocopied for participants

4. **Any additional materials (list below):**
   _____
   _____

FOR: 2 ½ -HOUR GROUP TRAINING SESSION

Activity	Time	Page(s)
"The Invisible Meeting" Welcome & Discussion Worksheet #1: "Challenges"	30 minutes	7 14
"Responding to the Challenge" Exercise & Discussion Worksheet #2: "Responding to the Challenge"	20 minutes	8 15
Video Presentation, Exercise & Discussion Worksheet #3: "The Invisible Meeting Video" Worksheet #4: "Key Training Points"	45 minutes	9-10 16-17 18
Break	10 minutes	——
"Action Plan" Exercise & Discussion Worksheet #5: "Action Plan"	30 minutes	11 19-20
Conclusion / Session Evaluation Worksheet # 5: "Session Evaluation Form"	15 minutes	12 21

(These times are approximate and may vary depending upon the size and responsiveness of your audience.)

This letter can be sent to your participants before the training session. You can customize it to fit your needs.

(Date)

To: (Participant's Name)
From: (Trainer's Name)
Re: **"The Invisible Meeting"**

The point is that conference calls have to be taken every bit as seriously as face-to-face meetings.

                     - Stephen Matola

You are invited to attend a workshop, entitled **"The Invisible Meeting"**. This thought provoking video & training session prepare both meeting leaders and participants for a more effective "virtual meeting" or conference call. As conference calls are rapidly replacing face-to-face meetings, we need to understand their unique challenges and the ground rules for making them more productive, including:

1. *Challenge*: Coordination   *Virtual Rule*: Cyber Coordinate
2. *Challenge:* Distractions   *Virtual Rule*: Minimize Noise
3. *Challenge*: Invisible People   *Virtual Rule*: Announce - Always
4. *Challenge*: Missed Body Language   *Virtual Rule*: Get Verbal Feedback
5. *Challenge*: Misunderstanding   *Virtual Rule*: Use Clear Language
6. *Challenge*: Isolation   *Virtual Rule*: Be A Team

Please mark your calendar for (insert date, time and place) so you can attend this important training session.

Thank you!

THE **INVISIBLE** MEETING	**Time Required:**	● 30 minutes
	Materials Needed:	● Graphic #1 (page 23)
		● Worksheet #1: "Challenges" (page 14)

Reveal Graphic #1:
"The Invisible Meeting"

Welcome:
Introduce yourself and welcome participants. Ask participants to introduce themselves and describe how conference calls are used in their work situation.

Read or Paraphrase:
This is a workshop about creating effective conference calls, which *are* really meetings that need to be taken seriously. We know the benefits of these virtual meetings – we can work from anywhere, people don't have to travel, we can work with qualified people all over the world…. However, virtual meetings have unique challenges that are worth considering.

Hand Out Worksheet #1 and Read or Paraphrase:
Please take a few minutes to complete Worksheet #1: Challenges.

Small Group Discussion
After allowing time for participants to complete Worksheet #1, have them form groups of 3 or 4 to discuss their answers.

Large Group Discussion:
Ask participants to share some of the answers and situations listed on their worksheets. You may guide the discussion to include some of the 6 challenges illustrated in the upcoming video:
1. Coordination (get people in different time zones together)
2. Distractions (participants multitasking, noisy environments…)
3. Surprise Guests (someone may make a negative comment about a meeting participant he didn't realize was there)
4. Missed Body Language (50% of communication is non-verbal)
5. Misunderstanding (people of differing languages, cultures, areas of expertise may have more trouble understanding one another)
6. Isolation (remote locations, lack of informal conversations)

THE INVISIBLE MEETING	**Time Required:**	● 20 minutes
	Materials Needed:	● Graphic #2 (page 24)
		● Worksheet #2: "Responding to the Challenge" (page 15)

Reveal Graphic #2:

Virtual meetings are becoming more commonplace, but the old rules for running a meeting don't necessarily apply.

- cio.com

How can we take advantage of new technology to get work done across vast distances, without losing some of the valuable parts of face-to-face human collaboration?

- ravenwerks.com

Hand Out Worksheet #2 and Read or Paraphrase:
Now that we've identified some of the unique challenges of virtual meetings, let's consider practical ways to overcome those challenges. On this worksheet, you will be asked to find solutions to make your virtual meetings more productive. [You may have participants work individually on these worksheets or in small groups.]

Large Group Discussion:
Ask participants to discuss the challenges, ground rules and examples, which they feel are most useful and exemplary.

	Time Required:	● 45 minutes: Video, Plus Discussion
THE **INVISIBLE** MEETING	**Materials Needed:**	● Video – "The Invisible Meeting" ● Graphic #3 & #4 (page 25 -26) ● Worksheet #3: "The Invisible Meeting Video" (pp. 16-17) ● Worksheet #4 "Key Training Points" (page 18)

Reveal Graphic #3:

Running an effective teleconference requires new skills.

- cio.com

It's not just about connecting people via phone or video; it's about getting things done efficiently.

- computerworld.com

Video Introduction:

You may wish to introduce the video by saying, "The video we will be watching, 'The Invisible Meeting', dramatically illustrates the unique challenges of virtual meetings and the techniques for overcoming them to run a productive meeting. As you watch the video, please note those situations that relate to your own work experience."

Hand out Worksheet #3: "The Invisible Meeting Video" and Present the Video

Explain to participants that the questions on the worksheet will be discussed after viewing the video. They may wish to take notes as they watch. Present the video. After viewing, have participants discuss the following questions in small groups or in the large group.

Q: As Jon begins his first meeting, no one is there. What are some reasons participants give for missing the meeting?

A: (Suggested) *Takashi couldn't figure out the right day of the meeting; Alana called the wrong number; Estefan didn't know he was part of the meeting; Mitch couldn't connect his laptop as a phone; and Darla didn't know what the meeting was about.*

Q: When Jon says "Learn to cyber coordinate", what specifically does he suggest for effectively coordinating a conference call?

A: *Use good scheduling software (if you have it) or send detailed emails and require confirmation; factor in time zones and times of day for everyone; provide an agenda and relevant documents in advance.*

(cont'd)

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Q: Distractions are a major problem in virtual meetings. When Jon gives Virtual Rule #2 - Minimize Noise—what does he suggest to deal with distractions?

A: *Don't multitask; find a place conducive to paying attention; use your mute button; and the team leader should keep the meetings short and focused.*

Q: What example is used to illustrate why announcing participants is so important at the beginning of a meeting and as new people come in?

A: *One of the team members, Mitch, makes negative comments about a company vice president who is listening, but wasn't announced.*

Q: Jon says that half of all communication is non-verbal. So how does he suggest we make up for the absence of non-verbal cues in a virtual meeting?

A: *The virtual rule is Get Verbal Feedback: probe for responses from all participants; conduct a poll on major decisions; and create an atmosphere where people are comfortable speaking up.*

Q: The designer, Mitch, uses a lot of jargon when describing how he wants the packaging for their product. What "challenge" does this illustrate and what is the solution?

A: *The problem is misunderstanding; only people in his field would understand him. The solution is to Use Clear Language: avoid jargon and idioms, and ask for clarification if you don't understand.*

Q: Isolation is a challenge for teams which meet only on conference calls. What are a few solutions Jon offers to overcome the isolation?

A: *Jon's suggestions for creating a feeling of a team are: allow time for informal conversation; acknowledge accomplishments; meet face-to-face when you can; contact people individually; and have team members talk to each other about specific issues that just involve them.*

Q: Which of the issues presented in the video are most relevant to your organization? Explain.

A: *Answers will vary.*

Reveal Graphic #4 "Key Training Points"
Hand out Worksheet #4 – "Key Training Points"
> Review the key training points. You may conclude the discussion by asking if there are any questions or comments about the training points or the video.

THE **INVISIBLE** MEETING	**Time Required:**	● 30 minutes
	Materials Needed:	● Graphic #5 (page 27)
		● Worksheet #5: "Action Plan" (pages 19-20)

Reveal Graphic #5 and Read:

The point of a meeting is to bring people together. A virtual meeting only brings to-gether their voices. To succeed, you have to make the extra effort to bring together everything else.

- "The Invisible Meeting" video

Hand Out Worksheet #5 and Explain:

Explain that this is the participants' opportunity to consider their own responsibility for making conference calls effective in their organizations. This exercise should also help them remember the points they found most useful in the video and workshop session.

Large Group Discussion:

After everyone has completed the worksheet, ask which actions might be the most diffi-cult for them to maintain. Why?

THE **INVISIBLE** MEETING	**Time Required:**	● 15 minutes
	Materials Needed:	● Graphic #6 (page 28) ● Worksheet #6: "Session Evaluation Form" (page 21)

Reveal Graphic #6 and Read:

At some unidentified moment in the last year, conference calls replaced meetings, and answering machines replaced conversation. No sense complaining, it is now time to make the best of it.

- Peter Block, OnlyConferenceCalls.com

Hand Out Worksheet #6 and Conclusion:

Ask participants for any final questions or comments. Thank your group for their participation, hand out Session Evaluation Forms, and ask participants to complete them before leaving.

PARTICIPANT WORKSHEETS

(For use in group workshops or self study)

> *Virtual meetings come with a unique set of challenges.*
>
> *It doesn't take much to bring a virtual meeting to a grinding halt.*

- "The Invisible Meeting" video

Instructions:

For Group Workshops: Please answer the following 2 questions, which you will be discussing in a small group later.

For Self Study: Please answer the following 2 questions before you watch the video:

1. List what you have found to be the unique challenges of conference calls or "virtual meetings."

_____

_____

_____

_____

_____

2. Give a specific example from a conference call where one (or more) of the "challenges" (listed above) negatively affected the meeting.

_____

_____

_____

_____

Virtual meetings are becoming more commonplace, but the old rules for running a meeting don't necessarily apply. Managers need to learn new skills to keep people engaged and to use the time (and technology) effectively.

- cio.com

How can we take advantage of new technology to get work done across vast distances, without losing some of the valuable parts of face-to-face human collaboration?

- ravenwerks.com

Instructions:

For Group Workshops: Working alone or in small groups, list 3 of the challenges from your Worksheet #1 (or from the large group discussion). For each challenge, come up with a solution to overcome the problem and provide an explanation or example. A sample has been done to clarify the instructions.

For Self Study: List 3 of the challenges from your Worksheet #1. For each challenge, come up with a solution to overcome the problem and provide an explanation or an example. A sample has been done to clarify the instructions.

Sample Challenge: Invisible Participants
Sample Solution: Announce all participants, at the beginning of the meeting and as new people enter.
Sample Explanation/Example: In a project team meeting, it would be essential to identify any customer present at the meeting, so no one says anything he or she would not want the customer to hear. In a face-to-face meeting, this obviously would not be an issue.

Challenge #1: _____

Solution #1: _____

Explanation/Example: _____

_____

Challenge #2: _____

Solution #2: _____

Explanation/Example: _____

_____

Challenge #3: _____

Solution #3: _____

Explanation/Example: _____

_____

Instructions:

For Group Workshops: After watching the video "The Invisible Meeting" answer the following questions—the workshop leader will have you discuss these questions in small groups or in the large group.

For Self Study: After watching the video "The Invisible Meeting" answer the following questions.

Q: As Jon begins his first meeting, no one responds. What are some reasons participants give for missing the meeting?

A: _____

_____

_____

Q: When Jon says "Learn to cyber coordinate," what specifically does he suggest for effectively coordinating a virtual meeting?

A: _____

_____

_____

Q: Distractions are a major problem in virtual meetings. When Jon gives Virtual Rule #2 - Minimize Noise – what does he suggest to deal with distractions?

A: _____

_____

_____

Q: What example is used to illustrate why announcing participants is so important at the beginning of a meeting and as new people come in?

A: _____

_____

_____

(cont'd)

Q: Jon says that half of all communication is non-verbal. So how does he suggest we make up for the absence of non-verbal cues in a virtual meeting?

A: _____

_____

_____

Q: The designer, Mitch, uses a lot of jargon when describing how he wants the packaging for their product. What "challenge" does this illustrate and what is the solution?

A: _____

_____

_____

Q: Isolation is a challenge for teams which meet only on conference calls. What are a few solutions Jon offers to overcome the isolation?

A: _____

_____

_____

Q: Which of the issues presented in the video are most relevant to your organization? Explain.

A: _____

_____

_____

The following are for your review only, as a reminder of the video's training points.

CHALLENGE		VIRTUAL RULE

1. Coordination ⇨   **Cyber Coordinate**
- Use scheduling software (when available)
- Consider time zones
- Provide an agenda and necessary materials in advance
- Get confirmation

2. Distractions ⇨   **Minimize Noise**
- Don't multitask
- Find a place conducive to paying attention
- Use your mute button
- Keep meetings short and focused

3. Surprise Guests ⇨   **Announce – Always**
- Announce everyone at the start of a meeting
- Announce as people come and go

4. Missed Body Language ⇨   **Get Verbal Feedback**
- Probe for responses from all participants
- Conduct a poll on major decisions
- Create an atmosphere where people are comfortable speaking up

5. Misunderstanding ⇨   **Use Clear Language**
- Avoid jargon and idioms
- Ask for clarification

6. Isolation ⇨   **Be a Team**
- Acknowledge accomplishments
- Take time for informal conversation
- Contact participants individually

I want to remember and use…

List 3 things from the video and/or workshop that you would like to remember and implement in your conference calls:

1._____

_____

_____

2._____

_____

_____

3._____

_____

_____

When will you have an opportunity to implement these actions?

_____

_____

What obstacles, if any, may prevent you from taking the above actions? How can you overcome those obstacles?

_____

_____

_____

_____

(cont'd)

What changes in your conference calls can you predict (if any) as a result of these actions?

_____

_____

_____

_____

<u>One month later…</u>

What changes have you implemented in your conference calls?

_____

_____

_____

What has been the benefit of these changes?

_____

_____

_____

What further actions do you plan to take to make your conference calls even more effective?

_____

_____

_____

Instructions:

Please circle the number that best describes your evaluation of the training session:

	Strongly Agree	Agree	Uncertain	Disagree	Strongly Disagree
This program clearly demonstrated the unique challenges in a virtual meeting.	5	4	3	2	1
This program clearly demonstrated the techniques for improving the effectiveness of virtual meetings.	5	4	3	2	1
This program provided practical information I can use in my work situation	5	4	3	2	1

The best part of the program was: _____

_____

The program could be improved by: _____

_____

_____

Additional comments: _____

_____
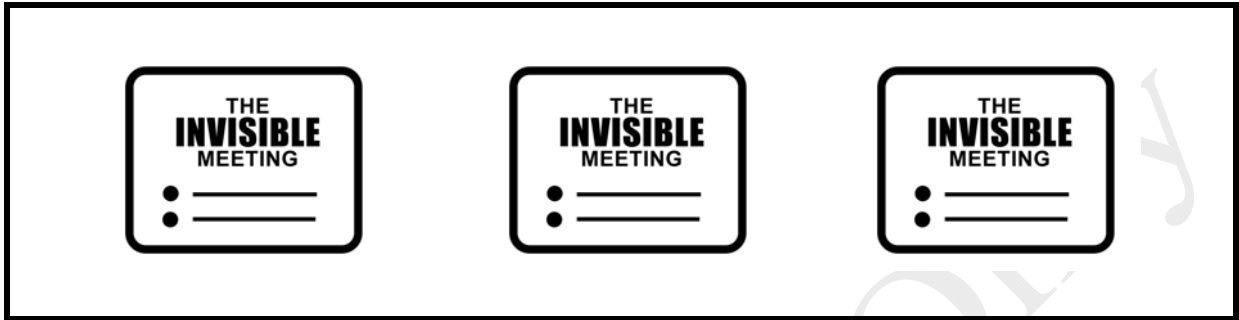
The following pages contain graphics that can be accessed and displayed in the following ways:

■ Video projection   ■ TV monitor   ■ Overheads   ■ Flip charts   ■ Handouts

Also, these graphics can be found within a PowerPoint file on the enclosed CD-ROM . Another option is to call up similar versions of these graphics using the DVD. Look for the "Graphics" button located on the main menu screen of the DVD. You will be able to display the graphics directly to your monitor before or after playing the video. Lastly, if ever needed, you can download the PowerPoint file directly to your computer from the Video Visions website:

www.videovisions.net

To download from the Video Visions website, look for the "Downloads" button on the home page—then navigate to the appropriate link.

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THE INVISIBLE MEETING

Virtual meetings are becoming more commonplace, but the old rules for running a meeting don't necessarily apply.

- cio.com

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Running an effective telecon-ference requires new skills.

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It's not just about connecting people via phone or video; it's about getting things done efficiently.

- computerworld.com

KEY TRAINING POINTS

CHALLENGE	VIRTUAL RULE

1. <u>Coordination</u> ➪ <u>Cyber Coordinate</u>

- Use scheduling software (when available)
- Consider time zones
- Provide an agenda and necessary materials in advance
- Get confirmation

2. <u>Distractions</u> ➪ <u>Minimize Noise</u>

- Don't multitask
- Find a place conducive to paying attention
- Use your mute button
- Keep meetings short and focused

3. <u>Surprise Guests</u> ➪ <u>Announce – Always</u>

- Announce everyone at the start of a meeting
- Announce as people come and go

4. <u>Missed Body Language</u> ➪ <u>Get Verbal Feedback</u>

- Probe for responses from all participants
- Conduct a poll on major decisions
- Create an atmosphere where people are comfortable speaking up

5. <u>Misunderstanding</u> ➪ <u>Use Clear Language</u>

- Avoid jargon and idioms
- Ask for clarification

6. <u>Isolation</u> ➪ <u>Be a Team</u>

- Acknowledge accomplishments
- Take time for informal conversation
- Contact participants individually

The point of a meeting is to bring people together. A virtual meeting only brings together their voices. To succeed, you have to make the extra effort to bring together everything else.

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At some unidentified time in the last year, conference calls replaced meetings, and answering machines replaced conversation. No sense complaining, it is now time to make the best of it.

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