

IOM3 Guidance for Running or Participating in Virtual Meetings

1. Introduction

Audio or video virtual meetings are effective ways of enabling geographically distant individuals or sites to interact successfully. They reduce the time lost to individuals in travel as well as helping the Institute reduce its costs and its environmental impact.

Virtual meetings tend to be more tiring than physical ones, perhaps because participants need to concentrate more to absorb information. It is therefore strongly recommended that they either be kept to a maximum of 90 minutes, or that there is a comfort break of at least ten minutes every 60-90 minutes if a longer meeting is needed.

2. Technical Considerations

Modern virtual meeting technologies can work exceptionally well. There are two main types – audio virtual meetings, generally conducted by telephone, and video virtual meetings, conducted via specialist videoconferencing kit or regular smartphones, tablets, laptops and desktops with suitable cameras, speakers and microphones¹.

Audio Virtual Meetings

Audio virtual meetings with a 3-5 participants can often be set up from a single phone. If this is the size of your meeting this might be worth considering, depending on the technology available.

For larger numbers, IOM3 currently uses [FreeConferenceCall.com](https://www.freeconferencecall.com). You can create your own free account with a meeting code and host PIN. Local dial-in numbers are available for over 70 countries. The caller pays the cost of the call. With modern mobile and fixed line phone contracts this will usually be included in the free minutes allowance, but callers may wish to check whether there is a fair usage policy that requires them to drop out and rejoin every so often to avoid a charge.

If some participants are gathered together in person and others are attending virtually, then using a good quality speakerphone will make the meeting much easier to conduct.

¹ For many uses, including on computers, a 'normal' smartphone headset works perfectly well, whether connected physically or via Bluetooth.

Video Virtual Meetings

IOM3 currently uses three main platforms, all of which can be joined via a normal laptop with a built-in camera, a desktop computer with attached web cam, a smartphone; or a tablet.

- **LifeSize Cloud.** This must be booked with the IOM3 team and can be joined via specialist videoconferencing equipment, an app (on smart phones, tablets and computers), Skype or a web browser. Joining instructions will be provided. This platform works well for multi-site videoconferences (a theoretical maximum of 50 per meeting).
- **Microsoft Teams.** This requires the organiser to have access to Microsoft Teams, but others can join via a web browser even if they don't have Teams. Again, joining instructions will be provided but usually are as simple as clicking a link.
- **Adobe Connect.** This must be booked with the IOM3 team and needs to be hosted by one of them, who will also need to be available to host the meeting and allocate presenting rights. This platform is good for screen-sharing of desktops as well as documents and some apps. It requires a Flash-enabled browser, which is still common but please note some users block Flash and some browsers are ending support for it later this year. Participants can join by webcam and/or computer audio, though the quality of the latter for speakers is known to be variable. If you prefer to use the phone for audio, you'll need to use your Freeconference call number.

It is recommended that participants test their connection to the service in advance to ensure there are no problems with firewalls, hardware such as microphones, etc.

To book a meeting using LifeSize Cloud or Adobe Connect, please speak to IOM3 Reception (reception@iom3.org or 020 7451 7300) who will be able to advise on availability and book as appropriate.

Sometimes the meeting Chair will have access to other services and will make the necessary information available in advance.

Generally, these services will also allow someone to join with audio only if no camera is available, or indeed via telephone if no computer is available.

3. Etiquette

Normal meeting best practice applies to virtual meetings too:

- Setting the date and time sufficiently in advance, and where possible, sending out a calendar appointment with accurate timings and joining instructions

- Circulation of an agenda and relevant papers sufficiently in advance (the IOM3 standard is a full week)
- Apologies or confirmation of attendance sufficiently in advance for administrative or organisational purposes
- Attendance on time – ideally joining up to five minutes before the scheduled start time. Late arrivals to virtual meetings are even more disruptive than for physical meetings
- The Chair should clearly and concisely summarise the main points and/or decisions for each item before moving to the next. All actions should also be repeated and the lead person responsible identified
- The date of the next meeting should ideally be agreed before the meeting ends

Specific audio and video virtual meeting best practice suggestions follow.

Audio Virtual Meetings

For everyone:

- Stay on the call from start to finish. If you cannot stay on the call, let people know at the start of the call.
- Be fully present. Have someone else handle business while you're on the call. Taking notes during the meeting can help maintain your concentration. Refrain from side conversations. If they are essential, mute your microphone
- Always identify yourself, especially when there are many participants. Where appropriate clearly identify by name the person to whom you are addressing a particular comment
- Wait for one person to finish before speaking; otherwise, comments will be muddled or cut off on speaker phones. Ideally, wait for a slight pause since many systems have a little time lag
- When you are not speaking, put yourself on mute to avoid stray background noises from interrupting the meeting. If this isn't possible, hold the receiver away from your mouth. Breathing noises may cause interference on all the phone lines. Refrain from shuffling papers, clicking pens or making other distracting noises if not on mute.
- Enunciate clearly and use concrete examples. Speak at slightly slower than normal speed. Experienced communication observers report that conference participants are heard more clearly if they slow down their delivery a bit.
- Be especially conscious of your tone and vocal inflections. Research indicates that people interpret vocal cues more accurately than facial expressions or body language. Alliances and factions are more easily recognized, as are resisters and supporters.

- Keep notes about points you want to make. Don't offer your thoughts immediately. Wait until it's your turn, or until you have several things to say. Use WAIT (Why Am I Talking).

If some people want to talk after the call for any reason, this is best arranged between them while all the other people are still on the line. It can only be accommodated if the facility is not booked by others.

For the Chair:

- If only a subset of participants are attending virtually, then the Chair of the meeting must remember to actively involve them in the meeting, for example by asking each of them in turn to contribute to each relevant agenda item.
- Be conscious of your "air time." Ask for the thoughts of others who may not be contributing enough
- If people are sharing a speakerphone, encourage them to seat themselves close enough to the microphone(s) so they are clearly audible, or move it round the table as appropriate.

Video Virtual Meetings

Most of the tips for audio virtual meetings apply here too. In addition, all participants should also:

- Speak as you would normally.
- Look into your camera while speaking. Looking off at another angle can be extremely disconcerting for other participants. Ideally, set up your camera so that looking at it and the screen is aligned
- Refrain from side conversations. If they are essential, blank your video feed as well as muting your microphone
- Think about what will be behind you on screen and if available, consider using a virtual background or background blurring
- Avoid moving around or fidgeting a lot or making sudden gestures, especially if you are using a virtual background.
- Note that the relative position of participants can be different on each screen so cannot be used to identify someone; it is best to use names where possible.

Summary of Best Practice Recommendations for Participants

Audio	Video
Stay on the call from start to finish. If you cannot stay on the call, let people know at the start of the call.	Stay on the call from start to finish. If you cannot stay on the call, let people know at the start of the call.
Be fully present. Have someone else handle business while you're on the call. Taking notes during the meeting can help maintain your concentration. Refrain from side conversations. If they are essential, mute your microphone	Be fully present. Have someone else handle business while you're on the call. Refrain from side conversations. If they are essential, blank your video feed as well as muting your microphone
Always identify yourself, especially when there are many participants. Where appropriate clearly identify by name the person to whom you are addressing a particular comment	Most videoconference platforms label your image, but it is still good practice to identify yourself fully early on. Where appropriate clearly identify by name the person to whom you are addressing a particular comment; note that the relative position of participants can be different on each screen so cannot be used to identify someone.
Wait for one person to finish before speaking; otherwise, comments will be muddled or cut off on speaker phones. Ideally, wait for a slight pause since many systems have a little time lag	Wait for one person to finish before speaking. Ideally, wait for a slight pause since many systems have a little time lag
When you are not speaking, put yourself on mute to avoid stray background noises from interrupting the meeting. If this isn't possible, hold the receiver away from your mouth. Breathing noises may cause interference on all the phone lines. Refrain from shuffling papers, clicking pens or making other distracting noises if not on mute	When you are not speaking, put yourself on mute to avoid stray background noises from interrupting the meeting. If this isn't possible, ensure you are in a quiet space and the microphone isn't close to your mouth and refrain from shuffling papers, clicking pens or making other distracting noises if not on mute. Also try to make sure you won't be interrupted for example by the ringing of a landline, etc.

<p>Enunciate clearly and use concrete examples. Speak at slightly slower than normal speed. Experienced communication observers report that conference participants are heard more clearly if they slow down their delivery a bit.</p>	<p>Speak as you would normally. Look into your camera while speaking. Looking off at another angle can be extremely disconcerting for other participants. Ideally, set up your camera so that looking at it and the screen together is lined up. Think about what will be behind you on screen and if available, consider using a virtual background or background blurring</p>
<p>Be especially conscious of your tone and vocal inflections. Research indicates that people interpret vocal cues more accurately than facial expressions or body language. Alliances and factions are more easily recognized, as are resisters and supporters.</p>	<p>Avoid moving around or fidgeting a lot or making sudden gestures, especially if you are using a virtual background</p>
<p>Keep notes about points you want to make. Don't offer your thoughts immediately. Wait until it's your turn, or until you have several things to say. Use WAIT (Why Am I Talking)</p>	<p>Keep notes about points you want to make. Don't offer your thoughts immediately. Wait until it's your turn, or until you have several things to say. Use WAIT (Why Am I Talking)</p>