

# Fundamentals of Successful Remote Meetings (2)

Dr. Eva Gallardo-Gallardo

Dr. Vicenç Fernández Alarcón



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# Learning Objectives



- How to make virtual meetings less horrible
- How to become a confident online facilitator
- How to deal with the problems that online meetings throw at you
- How to engage groups of distant participants in rich, multi-layered discussions

# Before start...

- *Some of these steps might seem elementary or redundant...BUT don't skip over any of them.*
- *The content of this course is technology-agnostic: Advices apply regardless of the application you use*
- *'Meetings' can be a boring topic... HOWEVER, they are the second-worst time-wasters in your work life. Thus, take them seriously*



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# 1. Introduction

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# What is a meeting?

*"a work meeting is defined as a gathering of two or more employees for a purpose related to the functioning of an organization or a group (e.g., to direct, to inform, to govern, to regulate). The gathering can occur in a single modality (e.g., a video conference) or in a mixed-modality format (e.g., mostly face-to-face with one participant connected via telephone). Typically, meetings are scheduled in advance (some notice is provided) and are informally or formally facilitated by one of the attendees. Meetings can be extremely brief (five minutes) to a full day in length."*

*(Rogelberg, 2018, p.4)*

# Two main problems with meetings

QUANTITY PROBLEM  
(Too many meetings)



Fewer meetings

QUALITY PROBLEM  
(Too many *bad* meetings)



Better meetings

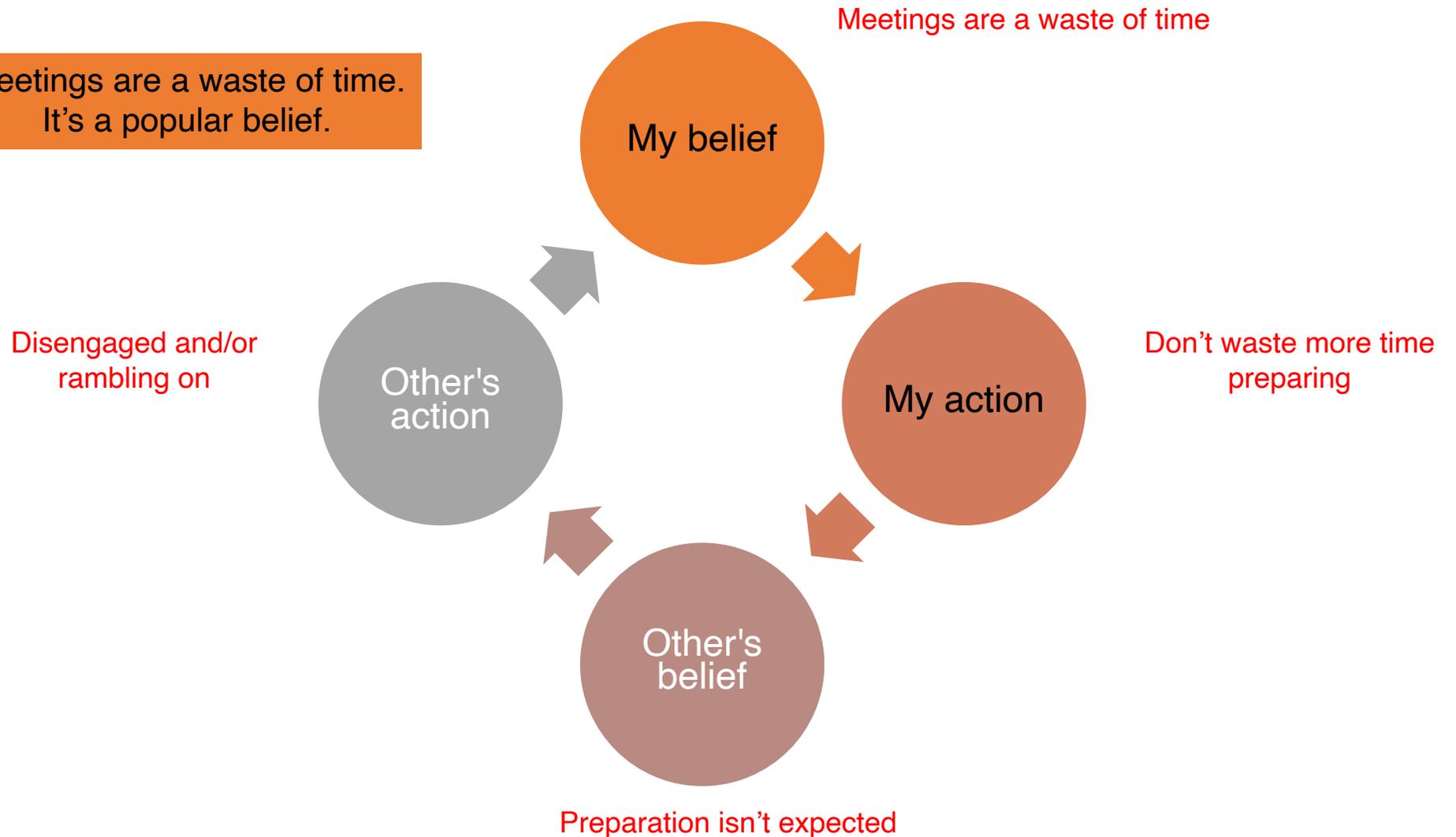
# The belief cycle

*Something that happened to you in the past, something that you read somewhere, or maybe something you saw in a movie one day*



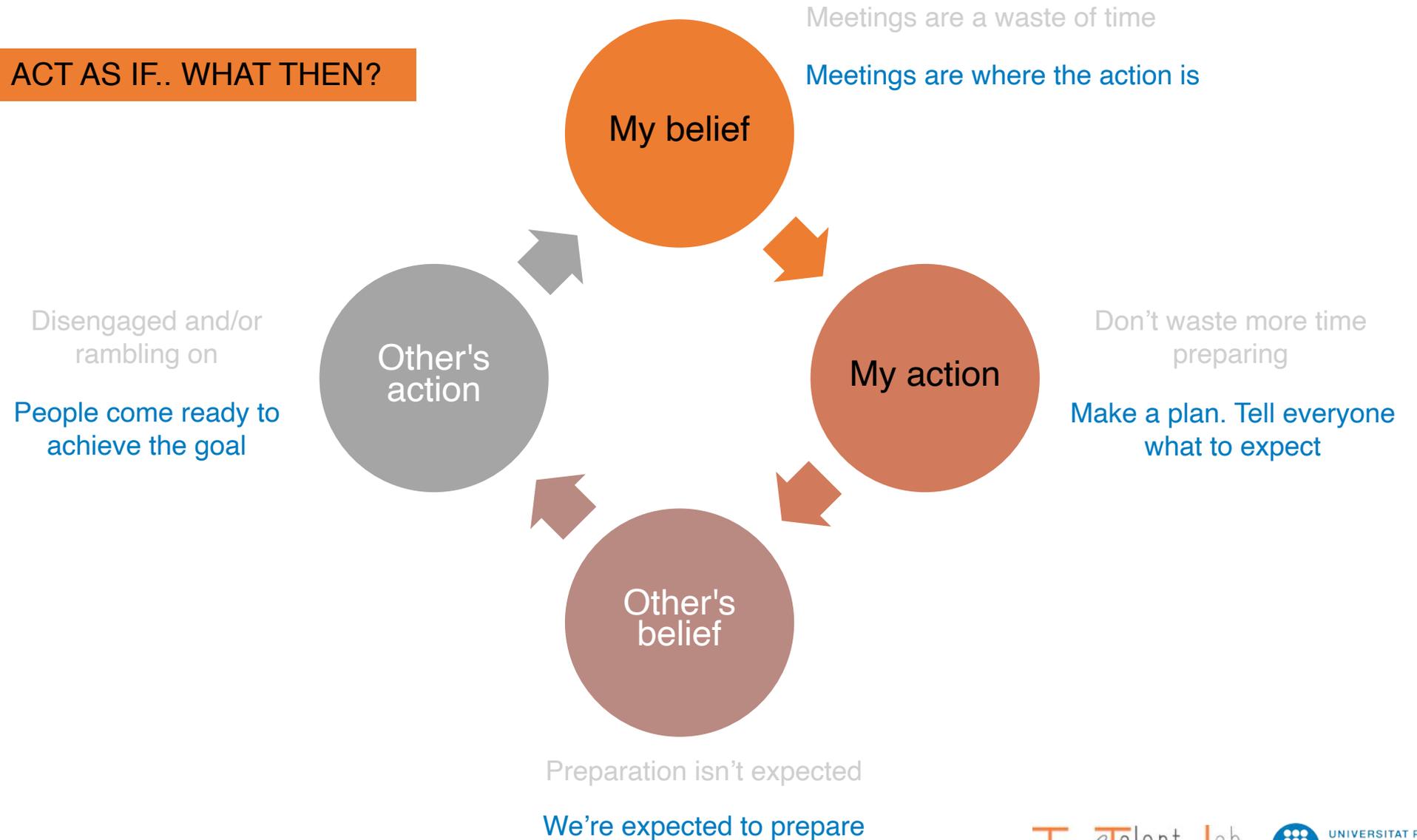
# The belief cycle on meetings

Meetings are a waste of time.  
It's a popular belief.



# The belief cycle: Breaking the Doom Loop

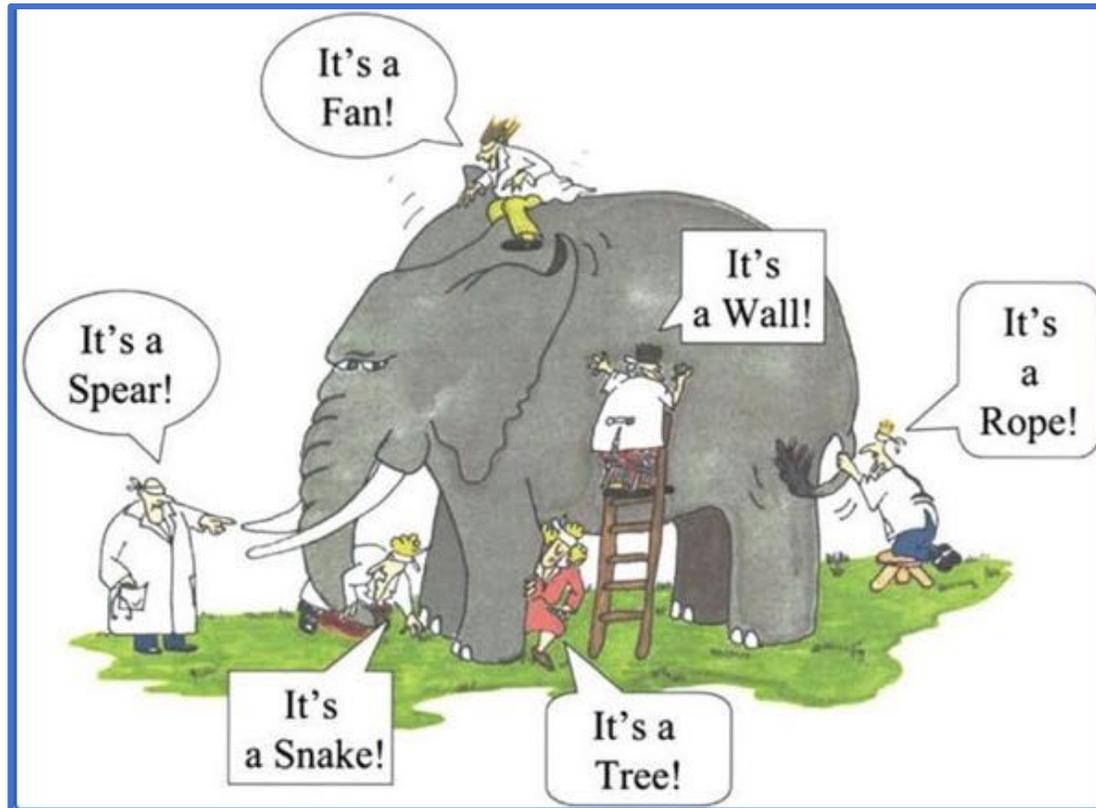
ACT AS IF.. WHAT THEN?



# What is *really* a meeting?

- A place to clarify your real priorities
- A place to show your true culture
- A place where the action is!

# WHY we meet?



We meet to quickly create shared perspective in a group!

Keith (2018, p. 456)

# WHAT DO YOU GET FROM TEAMS THAT HAVE A SHARED PERSPECTIVE

Source: after Keith (2018; pp. 1216-1227)

## CLARITY REGARDING THE WORK

- What's done.
- What remains.
- Who's doing what next.
- Which option the team is going with.
- What problems need to be solved. Which questions still need answers.

## TRUST (or, at least, the seeds of trust)

- When you hear other people's ideas.
- When other people listen to your ideas.
- When you learn about the context of other people's work.
- When other people make commitments.
- When other people report back on completed commitments.
- When the agreements you make and commitments you keep are appreciated by others.

To achieve a shared perspective you need two things:  
CLARITY about why you are meeting and what you need to accomplish;  
and a STRUCTURED plan for achieving that goal as a group

# The intention behind a meeting...

**MEETINGS' PURPOSE**

&

**DESIRED OUTCOMES**

human  
connection

+

work  
product

# Again... WHY we meet?

They allow us to create shared perspective ....

## Quickly

Email, reports, books, chats,  
video call can all work... but not  
so quick

## Reliably

No other communication tools give  
the clarity and level of control of a  
meeting

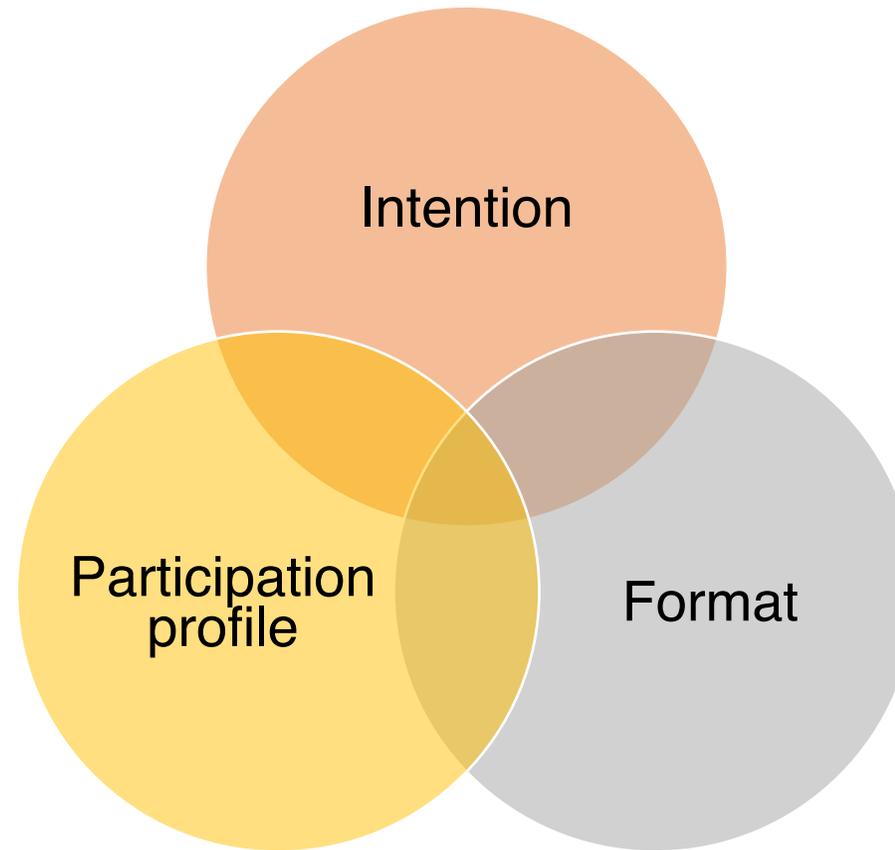


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## 3. Types of meetings

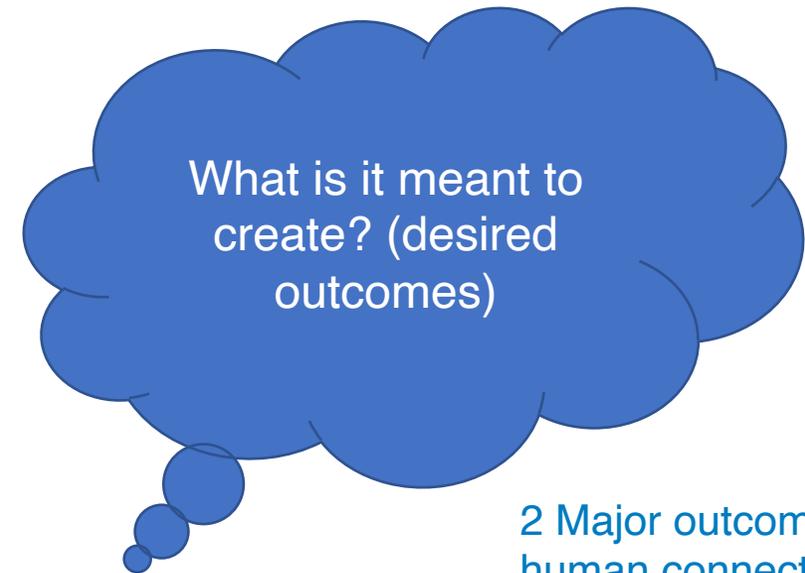
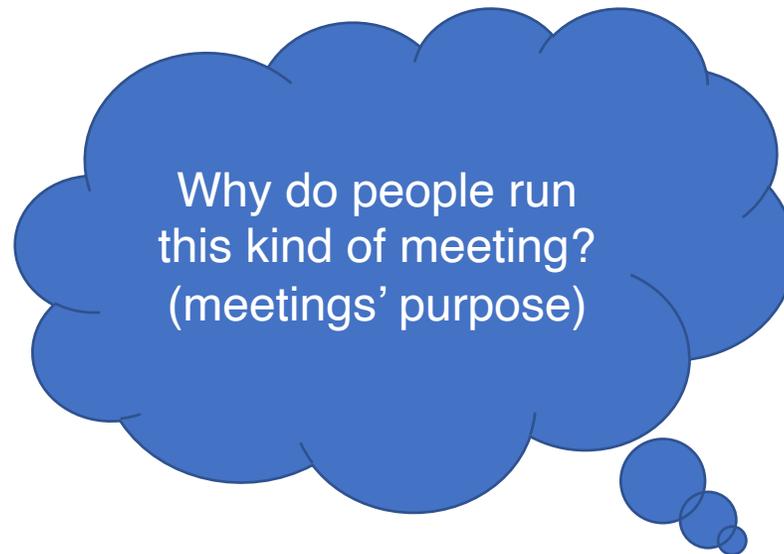
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# The differentiators



# The differentiators (I)

## Meetings' intention



2 Major outcomes: a human connection & a work product

We need to consider the meeting purpose and both kinds of outcomes when describing the meeting intention. (p. 912)

# The differentiators (II)

## The format

The strength of governing rules or rituals

The role of serendipity and tolerance for surprise

It turns out that formal and informal told me more about a participant's perception of social anxiety than it did about the type or format of the meeting.

Keith (2018; pp. 941-942)

# The differentiators (III)

## The expected participation profile

WHO is expected to  
attend

HOW they are meant  
to interact

Weekly team meetings often fail because people run them like project status updates instead of team meetings, focusing too heavily on content at the expense of connection, and their teams are weaker for it.

Keith (2018; pp. 977-978)

# Types of meetings: categories

Category	Description
<b>Cadence Meetings</b>	<p>They are used to review performance, renew team connections, and refine their approach based on what they've learned</p> <p>Involve an established group of people, with perhaps occasional guests. Most happen at regular and predictable intervals, making up the strategic and operational cadence of the organization.</p> <p>Follow a regularized pattern. Since the participants and the format are all known, they often require less up-front planning and less specialized facilitation expertise to succeed</p>
<b>Catalysts Meetings</b>	<p>These meetings change an organizations' work (e.g., new ideas, new plans, new projects, decisions to make). They are scheduled when needed, and include the people the organizers feel to be best suited for achieving the goals. They succeed when following a thoughtful meeting design. There is a lot more variation in format. This is the realm of engagement, decision and sensemaking activities.</p>
<b>Learn &amp; Influence Meetings</b>	<p>They are all designed to transfer information and intention from one person or group to another. They are scheduled by the person who wants something with the people they want to influence or get something from. Despite could sound Machiavellian, these meetings often indicate a genuine interest in learning, sharing, and finding ways to come together for mutual benefit. The format and rituals have more to do with etiquette than regulations or work product.</p>

# 16 Types of meetings

## Cadence Meetings

1. Team Cadence Meetings
2. Progress Checks
3. One-on-Ones
4. Action Reviews Meetings
5. Governance Cadence Meetings

## Catalysts Meetings

1. Idea Generation Meetings
2. Planning Meetings
3. Workshops
4. Problem Solving Meetings
5. Decision Making Meetings

## Learn & Influence Meetings

1. Sensemaking Meetings
2. Introductions
3. Issue Resolution Meetings
4. Community of Practice Meetings
5. Training Sessions
6. Broadcast Meetings



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## 4. High-Quality Meetings

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# How we can identify high-quality meetings?

Perceived  
Meeting Quality  
(PMQ)

Net Positive  
Impact (NPI)

What makes people feel like the meeting they just attended was worthwhile?

How what we do in meetings impacts what happens outside of meetings? How we can successfully use meetings in our overall work?

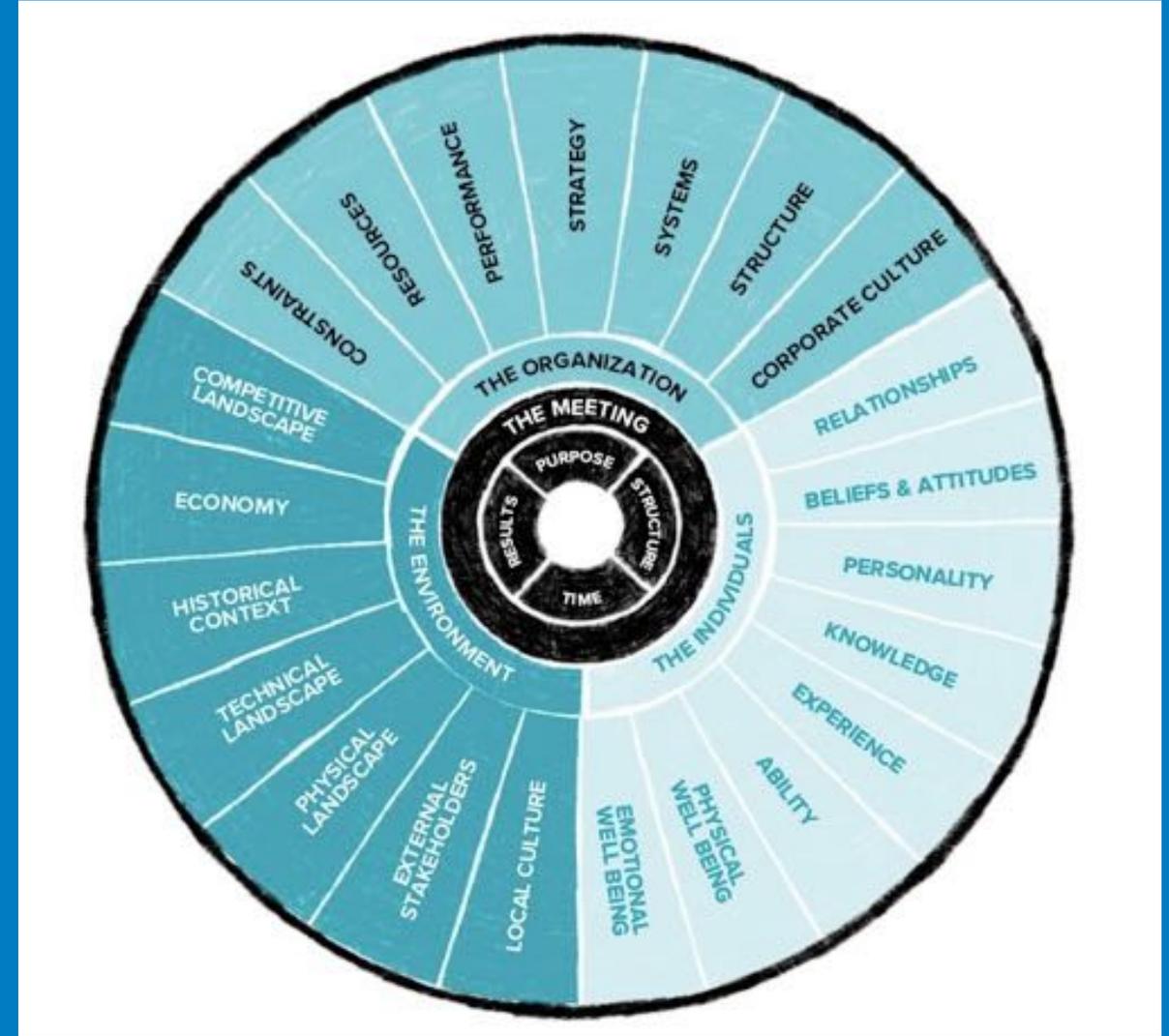
# Core competencies of High-Performing Meetings

- **Know the meeting's purpose and desired outcome.** Be specific. Why are you meeting? And What is the meeting meant to accomplish?
- **Structure meetings to achieve the desired outcome.** Use a process that helps the team achieve the goal, at the right time, in the right space, and with the appropriate people.
- **Respect the time invested.** Temporal courtesy. Starting and ending on time matters!
- **Structure meetings for engagement.** Know how everyone present will contribute to the outcome.
- **Take visible notes.** Visible agendas and taking notes that everyone can see makes progress visible, improve engagement, & clarify outcomes.
- **Publish meeting records where everyone can find them.** Central records make it possible to build on results, reuse successful meetings designs, and keep meetings small. Transparency about what happens in meetings helps everyone to avoid personal politics. 'It's our meeting'

# Interesting thought!

Success in meetings requires getting the mechanics right, and building the relationships, and producing useful business results.

Source: Keith (2018, 175-176)



# Final thought!

Many of the basics about running successful remote meetings are the same as for in-person meetings





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# REFERENCES

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*Further readings:*

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you