

Virtual meeting etiquette – one year on

March 2021

As we reach the anniversary of a year of remote working, most of us would not have imagined how adept we would become at navigating virtual meetings. Here we share some of the things we have learned to help keep virtual meetings on track, whether you are chair, scheme secretary, or trustee.

Sackers

Chair and scheme secretary

- 1 Maintain the focus:** the meeting needs to be kept focused and effective. Strip out all the unnecessary content and focus on the decisions that need to be made.
- 2 Keep to time:** decide the agenda and timings beforehand and stick to these. Make sure you sum up the decision taken at the end of each agenda item. Set some time to ask at the end of the meeting what worked and what could be improved.
- 3 Be human:** remember to build in breaks within long meetings. Consider having a 'soft' start time 15 minutes beforehand to allow for informal catch ups before a 'hard' start time – maintaining good interpersonal relationships is as important as ever.
- 4 Make the rules clear:** make sure everyone knows the rules of conduct, for example cameras on, only unmute for speaking and 'raise a hand' to speak.
- 5 Get to grips with the controls:** the meeting host should take time beforehand to learn the controls, for example managing the chat function, setting everyone to mute, and using break out rooms.
- 6 Let no one go unnoticed:** the chair will need to actively reach out to participants to ask their views to ensure everyone's points are heard, more so than in-person meetings. The secretary can help with this by noting who has indicated they wish to speak.
- 7 Stay secure:** there is no one-size-fits-all answer to whether you should discuss sensitive matters in an online meeting. Pay close attention to the security and encryption used by your meeting provider before deciding this. Activating passwords and host-controlled waiting rooms have quickly become minimum standards. Enabling Multi-Factor Authentication (MFA) whenever available helps protect your account should your password be compromised, and if it isn't an option, you may want to consider a different platform.

Trustees

- 1 Prepare to be active:** there will not be much or any time devoted to running through papers to get everyone up to speed, so make sure you have done your reading beforehand, are clear on what the meeting agenda is and noted any points or questions you wish to raise. Regard yourself as under a responsibility to contribute actively.
- 2 Appearances count:** make sure you are positioned somewhere with good lighting and you have angled your camera correctly – other participants don't want to see a silhouette or just the top of your head. Invest in good quality headsets and speakerphones.
- 3 Testing, testing:** if you have consistent issues with broadband, consider fixes such as using a mobile 'hotspot' for meetings. Some connection issues are still inevitable, but most meeting platforms have a dial in function so that participants can at least use a landline to join the call if there are issues on the day.
- 4 View papers separately:** screen sharing on an online platform is not always a success and reduces the visibility of those on camera. Everyone should be given easy separate access to papers. View papers on a second screen so that you can see the other participants clearly.
- 5 Check your settings:** there are plenty of viral videos circulating of virtual meeting mishaps, from humorous filters to unwanted interruptions. If you share a computer with someone else, check they have not left a funny filter on, changed the background or changed your name before you join the meeting!