Forming and Norming the Team:
Face-to-face meetings allow full communication including team member’s words, silence or noises, and body language. These are all ways that a team leader can interpret receptivity to ideas and draw out feedback or new ideas from team members. The absence of visual cues and the potential for muted audio can leave a team coordinator swimming in the dark. This document provides ideas for bridging the virtual divide in order to strengthen communication and effectiveness of working with virtual teams.

Prior to Meeting:
- **Plan ahead** as virtual meetings require more preparation than a face-to-face meeting
- **Establish a regular meeting schedule** (send calendar/appointment invitations)
- **Prepare an agenda and related support materials early and distribute in advance** of the meeting. Include: items, responsibilities, timeframe, purpose, expected outcome/decisions, and estimated time during the meeting for the discussion.
- **Ask team members to provide written status reports prior to the meeting** for team members to pre-read before the call. Include finished actions, upcoming activities, any challenges, and any needed assistance/resources for the next steps. Limit verbal report to discussing any needed assistance or resources necessary for next steps.
- **Connect to technology early and test.** Have a back-up plan.

Starting the Meeting:
- **Have everyone speak at the start of the meeting** to ensure everyone’s technology is working and to set the expectation for participation.
- **Use people’s names frequently.** If someone signs on and their name is not displayed, provide visual cues for people to know who is on. For instance, in Zoom, you can change a phone number to a person’s name. Chat boxes can also help to identify people.
- **Set the expectations that the team members use their cameras** whenever possible. These should be aimed at the person’s face. Explain the importance of body language as cues in virtual meetings just as it is for face-to-face meetings. This also helps limit multi-tasking.
- **Build time into the agenda to foster social capital**, especially for new teams. Consider using introductory prompts to facilitate these conversations, such as:
  - A rewarding project for me is one that...
  - The best attribute I bring to this team is...
I am most motivated and engaged when...
Something going on around me today is...

- **Provide a quick orientation to the meeting’s technology** format including chat, mute, and other participatory features.
- **Establish ground rules** which might include:
  - Limiting personal distractions including phone and email
  - Avoid interruptions such as by posting a note on your door indicating you are in a meeting.
  - Participating fully
  - Balancing participation – giving space for quieter participants
  - Using a camera – aimed correctly

---

**During the Meeting:**

- **Provide aids to keep people on track** with the discussion:
  - Share a screen shot of the agenda.
  - Check to ensure everyone has all the required materials
  - Reference document names and page numbers, etc. often.
  - Be explicit when changing agenda items.
- **Speak clearly**, more slowly and use a microphone.
- **Record meeting** unless sensitive information prohibits or would deter participation.
  - Ask someone to take notes or minutes of the meeting
  - Let participants know the meeting is being recorded
- **Check in with team members regularly** during the meeting.
- **Use a touch-pad matrix** to monitor participation.
- **Organize communication, so that everyone can be heard.**
  - **Call on people one at a time** when you need to hear from everyone.
  - Use stacking when multiple participants want to respond. The facilitator can say "several of you spoke up at once – I think I heard Karen first, and then John, then Sarah. Did I miss anyone?"
  - Create space for someone who has not had a chance to speak up. The meeting facilitator might ask: "What do others think? Mark, you have been silent. What is your read on this?"
- **Allow for silence.** In a virtual setting, people often need more time to think and respond. Use the “10 Second Rule”: Ask a question, then silently count 10 seconds before speaking again. If no one has spoken up by that time, restate your question and wait again.
- **Establish decision making processes:**
  - Parliamentary procedure online. You might use the raised hand feature in your meeting platform to be certain that everyone who wants to speak is included.
  - Listen to each team member. Repeat key points (as appropriate) and ask if the team is ready to vote.
Email vote: If a delayed vote is acceptable, an email vote is an option.
Round robin vote: In small groups, you can go around the team and ask for a verbal vote.
Online polling within the meeting space or using a separate polling tool.

Meeting Wrap-Up:

- **At the close of the session**
  - Summarize key points
  - Recap decisions made
  - Identify action items
  - Check for agreement

- **Provide a process check-in** at the close of the session: How did this meeting go? What would make it better?

- **Record and post an Action Plan** that includes what, when, and who of each step. This tool becomes both a reminder and an accountability record for the team. It also helps ensure important steps aren’t dropped along the way. Each meeting should include a review and updating of the tool, adding completed dates, new tasks, etc.

<table>
<thead>
<tr>
<th>Action</th>
<th>Lead Person</th>
<th>Others Assisting</th>
<th>Deadline</th>
<th>Completion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Find the RFP and distribute to the team</td>
<td>Bob</td>
<td>Susan, Tom</td>
<td>January 18</td>
<td></td>
</tr>
<tr>
<td>Draft the literature review</td>
<td>Angela</td>
<td>Ed, Susan</td>
<td>January 30</td>
<td></td>
</tr>
<tr>
<td>Draft a summary of steps completed to date</td>
<td>Tom</td>
<td>Alex, Jane</td>
<td>January 30</td>
<td></td>
</tr>
<tr>
<td>Set up a shared folder in Dropbox</td>
<td>Bob</td>
<td></td>
<td>January 18</td>
<td></td>
</tr>
</tbody>
</table>

Immediately After the Meeting:

- **Copy the chat** before ending the meeting and save it as a document
- **Send out minutes** as soon as possible - within 48 hours. Include responsibilities/tasks/deadlines, decisions made, action steps
- **Send out the recordings.** Consider content, edit out extra time where possible
- **Set up prompts to follow up on action steps** as needed—talk about how to do this, why it is important

Communicating between meetings:

- Celebrate successes – look for creative ways to celebrate together - BYO Cupcakes; open a gift together
- Maintain a shared plan of action chart. Address where to house, who updates, etc.
- Check in regularly with individuals and work teams on progress.
- Select the best tool for the purpose of the communication. The chart below provides some guidelines:

<table>
<thead>
<tr>
<th>Tool</th>
<th>When To Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone</td>
<td>● Quick sync-ups or situations where you need an immediate answer.</td>
</tr>
<tr>
<td></td>
<td>● Times when you need a more personal connection</td>
</tr>
<tr>
<td></td>
<td>● When you need to solve a more complex question</td>
</tr>
<tr>
<td>Email</td>
<td>● Communications that don’t need a fast response</td>
</tr>
<tr>
<td></td>
<td>● Messages that need to be recorded</td>
</tr>
<tr>
<td>Group Project Management Platforms</td>
<td>● Post announcements to the whole group</td>
</tr>
<tr>
<td></td>
<td>● Pose questions/processes that need the entire team’s collaboration</td>
</tr>
<tr>
<td></td>
<td>● Information that needs to be recorded.</td>
</tr>
<tr>
<td></td>
<td>Examples: Basecamp, Microsoft Teams, Chatter,</td>
</tr>
<tr>
<td>Instant messaging/texting</td>
<td>● Messages that need a quick answer, but don’t need to be recorded.</td>
</tr>
<tr>
<td></td>
<td>Examples: Skype messaging, Slack, Google Chat, cell phone texting</td>
</tr>
<tr>
<td>Web conference</td>
<td>● Scheduled team meetings</td>
</tr>
<tr>
<td></td>
<td>● 1 on 1 or small group check-ins</td>
</tr>
<tr>
<td></td>
<td>● Meetings you need to record</td>
</tr>
<tr>
<td></td>
<td>● Times when seeing body language is important such as problem solving, decision-making, or conflict resolution.</td>
</tr>
<tr>
<td></td>
<td>Examples: Zoom, Skype, Adobe Connect, GoToMeeting</td>
</tr>
</tbody>
</table>

Chart adapted from Virtual Collaboration – Develop Your Virtual Strategy
[https://trailhead.salesforce.com/en/modules/manage_the_sfdc_way_virtual_collaboration/units/msfw_virtual_collab_develop_your_strategy](https://trailhead.salesforce.com/en/modules/manage_the_sfdc_way_virtual_collaboration/units/msfw_virtual_collab_develop_your_strategy)