How to have virtual meetings based on Behavioural Science

What is this guide about?

- *"You're on mute"*, *"I can't see you"*, *…*stone silence*…* Meetings have looked remarkably different since we started having so many of them virtually. Now virtual meetings (where one or more attendees are online) are often a staple of our working lives.

- In this document we use behavioural science, the study of human behaviour, to answer the question: How do we have effective virtual meetings?

- We show that, while virtual meetings pose challenges to having good meetings, we can overcome many of these challenges. In some cases, virtual meetings may even have benefits over meeting face to face.

Key idea

- The same factors that lead to unproductive face to face meetings are amplified in virtual meetings.

- This means that the tools that make face to face meetings more effective are even more important virtually. For instance, it's important to have an agenda in a face to face meeting, but it is *really* important to have an agenda in a virtual meeting.

Who is this guide for?

Anyone who is involved in virtual meetings

What is in this guide?

**Part 1: Should this be a meeting**: Sometimes the best meeting is no meeting at all

Part 2: Five principles for a good virtual meeting: These principles can be applied to all or most virtual meetings.

Part 3: How to brainstorm virtually

Part 4: 'Zoom fatigue'

Should this be a meeting?

Before thinking about the principles of a good virtual meeting, we must first ask if we should have the meeting in the first place. The flow chart below can help you decide if you really need a meeting, or not.
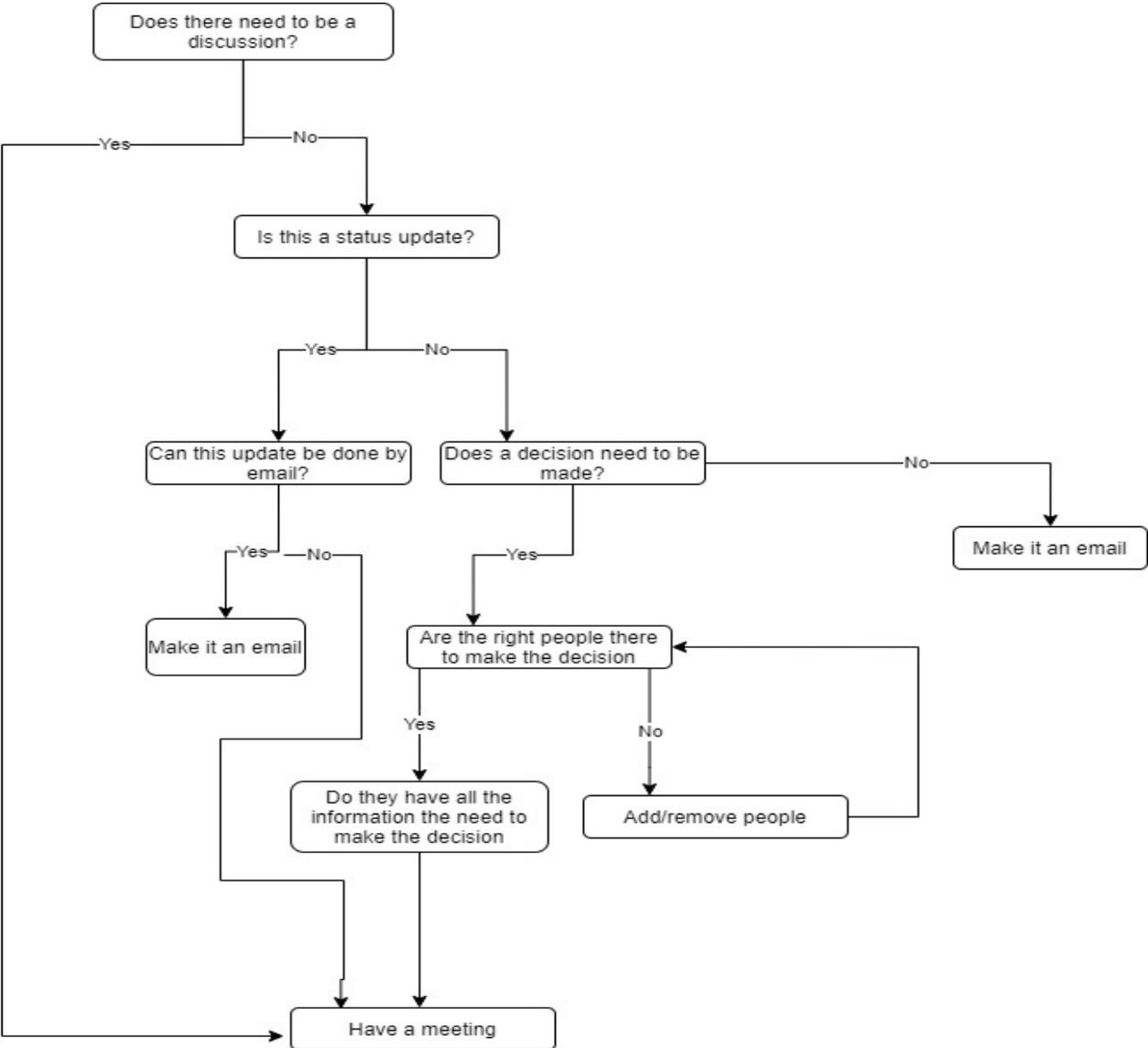
Five principles for a good virtual meeting

1: Set clear expectations

How do I know when I can talk? Should I have my camera on or off? Should I use the chat function? Should I send a meme?

Virtual meetings are often a struggle because people are unsure how they should behave. You can help minimise uncomfortable uncertainty by setting clear expectations for your attendees.

There are no rules when it comes to expectations, but clear expectations are better than none. Expectations can and should be adapted as needed (over time or from meeting to meeting).

Here are some expectations you might want to think about:

- **General social norms:** Be clear around behaviours that will help the meeting run more smoothly. For example:
    - Mute your microphone when you're not speaking
    - Start and finish on time
    - When you ask a question, start by saying your name and where you're from

- **How do we start and end?** Do we have an opening and closing karakia? If so, do attendees know where to find them?

- **How do attendees ask questions?** Do they use the chat function? Raise their virtual hand? Wait until the Q&A? Be clear when and how people can ask questions.

- **The structure of the meeting:** Will there be a presentation followed by a Q & A or are attendees expect to ask questions along the way?

2: Clarify roles and responsibilities

Clear roles and responsibilities can help a meeting run smoothly.

Below are some roles you might want to assign to attendees:

1. **Meeting conductor:** Someone who makes sure people stick to the agenda, don't run over time and don't get off topic.
2. **Facilitator:** Someone to lead the discussion. This person may call upon people in the meeting to share their thoughts "What do you think Jared?"
3. **Question Master:** People may send questions through in the chat and so this person can go through them, see which ones are most popular and then ask them to the group.
4. **Minute Taker:** Someone to take notes on the meeting.

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3: Be clear on the goal of the meeting

What is the goal of the meeting?

Attendees should know what the meeting is about, its goals and general structure. We know that meetings are more efficient when the goals of the meeting are clear (Leach, 2009). Here are some examples of goals your meeting might have:

1. **To make a decision** e.g. who do we hire?

2. **To discuss the merits of an idea** e.g. should we publicly release this how to guide?

3. **To brainstorm ideas** e.g. what qualities are we looking for when we put out a job advert?

Propose a process to achieve the goal of the meeting

Agreeing on a process to achieve the goals you set out significantly increases meeting effectiveness, yet leaders rarely do it. Below is an example of what the process could look like:

1. Gather all the relevant information (10 min)

2. Agree on what the problem is (10min)

3. Brainstorm some solutions (15 min)

4. Brainstorm the criteria we will use to determine if those solutions were effective (10 min)

5. Brainstorm how we will measure the impact (10 min)

Unless a process is explicitly stated, people in the meeting will usually just use their own process. Some will be thinking what the problem is, while others will be coming up with solutions.

Seem obvious?

See the appendix for why this seemingly obvious step is often overlooked.

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4: Take the time to connect

When meeting virtually, one of the things people tend to miss is interacting with others.

We can replicate some of the connection that would take place in the real world.

Management literature suggests that an effective way to do this is through **high-quality connection** interactions. These are short interactions that build relationships between people (Cameron, 2011).

Here are some examples:

- Introductions if attendees don't know each other
- Question of the day
- Taking turns to do a home office tour

As well as building connections, getting people talking at the start of a meeting also increases the chance they will participate in discussions during the meeting.

5: Ask for feedback

Collect feedback from attendees on how the meetings are going and if anything should be improved. Asking for input helps people be more involved.

Time for feedback can be built into the agenda. For instance, if this is a regular weekly meeting, the final 5 minutes of the last meeting of the month could be spent on feedback.

Some questions that could be answered are:

1. Was the agenda distributed in time for everyone to prepare?
2. Was the purpose of the meeting clear?
3. Did the process we use in the meeting work?
4. How well did team members prepare for the meeting?
5. Did we take the time to connect?
6. How well did we estimate the time needed for each agenda item?
7. How well did we allocate our time for decision making and discussion?
8. How well did everyone stay on-topic? How well did team members speak up when they thought someone was off-topic?
9. How effective was the process for each agenda item?

Many of the questions on this list were taken from:
https://hbr.org/2015/03/how-to-design-an-agenda-for-an-effective-meeting

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How to brainstorm virtually

Why normal brainstorming does not work online

There are at least three problems with traditional brainstorming, which are amplified when we go online:

1. **Production Blocking:** A few people dominate the conversation and therefore not everyone's ideas get heard.
2. **Ego Threat:** People don't want to be embarrassed or be criticized and so they hold back on some of their ideas. This is especially true for their most original ideas.
3. **Conformity:** As an idea becomes popular everyone starts to favor that idea rather than creating new and original ideas. This leads to ideas that are similar to each other rather than a range of possibilities.

Three steps for virtual brainstorming

To overcome the problems of traditional brainstorming, break down the creative process into 3 steps.

1. **Idea generation:** Here people come up with ideas by themselves. Perhaps everyone is on mute for a set amount of time while people write down ideas.
2. **Idea building:** All ideas are shared with the group. The group can build and develop on each other's ideas. Evidence suggests that teams produce higher quality ideas when groups brainstorm individually and then bring their ideas together[1]. For example, attendees could send their ideas to the moderator of the virtual meeting, who can then share them with the whole group to receive feedback. This way the author of each idea is anonymous, which makes it is more likely each idea will be judged on its merits rather than who its creator was.
3. **Idea selection:** Here the group decides which ideas show the most promise. This could be done by voting anonymously or by discussing each idea's merits and vices.

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'Zoom fatigue'

Why do people get 'Zoom fatigue?'

The short answer is that we don't know for sure, since research on Zoom fatigue is in its infancy. However, there are at least two potential reasons.

1. **Virtual meetings use a lot of mental resources.** When you are in a virtual meeting with 10 people staring back at you, your brain is automatically trying to process everyone's facial expressions and body language. This intense mental effort can lead you to feel exhausted, especially when you have a day filled with virtual meetings (Bailenson, 2021).

2. **The ease of virtual meetings means you have a lot of them:** Alternatively, because virtual meetings are easy to schedule, we may just be more likely to have more meetings than normal. We may feel more tired simply because we have more meetings in general. However, people may misattribute their increased tiredness to virtual meetings, rather than the increased number of meetings.

What is 'Zoom fatigue?'

Zoom fatigue is when we feel tired or burnt out because we have had too many virtual meetings.

How can we reduce 'Zoom fatigue'?

1. **Turn off your video camera:** This reduces the mental load on attendees. If you are running the meeting, give attendees permission to turn off their own camera. If you want to turn your own camera off, it might be helpful to explain to others why. (Refer to the first principle of good virtual meetings: setting clear expectations)*

2. **Reduce self-consciousness**: Turn off self-view (if this option is not available, try fitting a notepad window over your self-view). This can also reduce distraction

3. **Have fewer meetings** (refer to 'Should this be a meeting')

*Of course,some people like to have their cameras on. So if this is you, feel free to leave the camera on. Leaving your camera on shows others that you are paying attention. It allows for better non-verbal communication which can minimise misunderstandings. A visual connection builds trust and confidence and can foster a better connection between people and minimise feelings of isolation.

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Appendix

The curse of knowledge

Step 3 seems obvious. Yes, thanks Jared, whoever you are, a meeting should have a goal, thanks heaps for that.

I totally get your point anonymous reviewer, it does sound obvious, but here is why it's not.
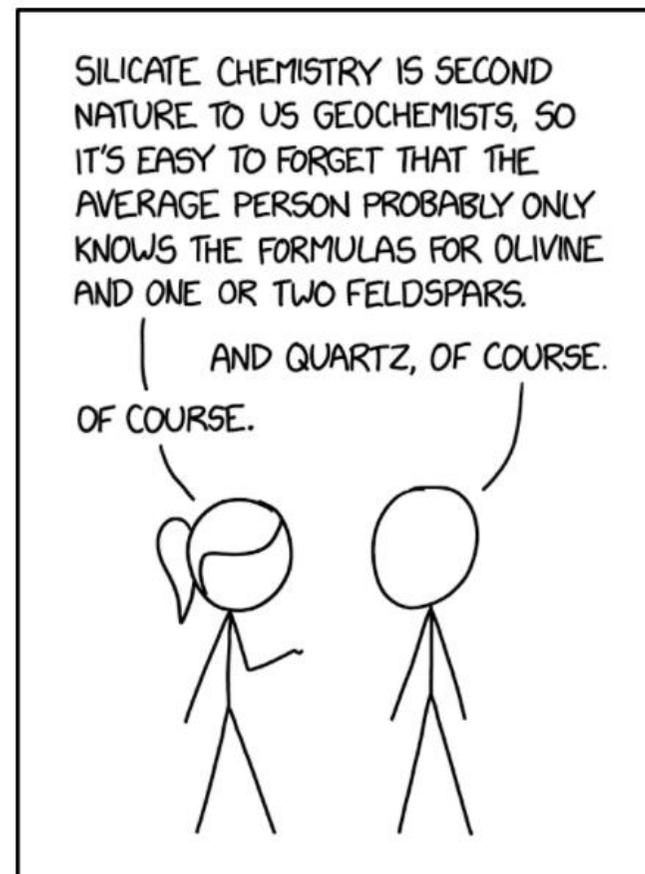
We all know a meeting should have a goal, but often this goal is not explicitly stated. Instead people often assume that everyone has the same goal in mind, but this is often wrong. This idea is best explained by **the curse of knowledge.**

The curse of knowledge is the idea that when you know something, it is hard to imagine what it's like not to know that thing.

When you're chatting to a friend about work one night and you know what a governance group is, how an agile project unfolds, or what we mean by an evaluation framework, it's hard to imagine what it's like for our poor friend who doesn't work in government and has no clue what strings of jargon you have just unleashed on them.

In short, we assume people know and think the same things we do.

Thus, we think the goal of a meeting is to get a firm grasp on what the core issue of a problem is, but someone else thinks the goal is to evaluate solutions and another to brainstorm ideas. If the goal of the meeting is not understood by everyone, progress is slow and frustrating. The solution? Be explicit about what the goal of the meeting is.

SILICATE CHEMISTRY IS SECOND NATURE TO US GEOCHEMISTS, SO IT'S EASY TO FORGET THAT THE AVERAGE PERSON PROBABLY ONLY KNOWS THE FORMULAS FOR OLIVINE AND ONE OR TWO FELDSPARS.

AND QUARTZ, OF COURSE.

OF COURSE.

EVEN WHEN THEY'RE TRYING TO COMPENSATE FOR IT, EXPERTS IN ANYTHING WILDLY OVERESTIMATE THE AVERAGE PERSON'S FAMILIARITY WITH THEIR FIELD.

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