



**ENGAGING**

# VIRTUAL MEETINGS



*ENGAGING*

# **VIRTUAL MEETINGS**

**openers, games, *and* activities**  
*for* **communication, morale, *and* trust**

**JOHN CHEN**

**WILEY**

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# PART 1

## Principles and Preparation for Engaging Virtual Meetings

# 1

## The ENGAGE Method for Leading Great Meetings

If you want engaging virtual meetings, then learn the ENGAGE method. The method has been refined over the past 35 years and has a remedy for the most common virtual meeting problems. ENGAGE stands for:

**E**ngage and interact with every attendee.

**N**ever lead a meeting alone.

**G**ood looks.

**A**ir traffic control.

**G**et productive with virtual tools.

**E**nd your meeting on a high note.

### **A Brief Overview of the ENGAGE Method**

*Engage and interact with every attendee.* If you want engagement, engage! If you want your next virtual meeting to be engaging, then try different ways to engage your attendees. Greet all of your attendees as they arrive. Have every attendee check in. Ask your attendees to chat. Keep track and check in with the attendees who haven't said anything and give them the opportunity to pass if they don't want to contribute.

Go to [bit.ly/evmengage](https://bit.ly/evmengage) to see a video of a professional host giving a demonstration of engaging and interacting with every attendee.

*Never lead a meeting alone.* If you want engagement, assign an attendee or someone you invite to a meeting a role in the meeting (after you have trained them). Roles include chat engagement, muting and unmuting, renaming, and security. Any or all of these roles can be delegated. They must be engaged to do their job and it allows you, the host, to focus on connecting with your attendees.

Go to [bit.ly/evmnever](https://bit.ly/evmnever) to see a video of a professional host working with a producer as an example of never leading a meeting alone.

*Good looks.* If you want engagement, look good. Take a shower. Dress up. Frame your face. Clean up your background. Turn on your lights. Wear your company gear. Wear bright colors.<sup>1</sup> Like Bruno Mars says, “If you want to show up, then show out.”

Go to [bit.ly/evmgood](https://bit.ly/evmgood) to see a video of multiple backgrounds evaluated for good looks.

*Air traffic control.* If two or more people talk at the same time, no one can hear. An engaging meeting is when you understand what is said. You can help by creating air traffic control. From physical to virtual hand raises or other types of talking sticks, help find a way for attendees to communicate without stepping on each other’s auditory toes. Until a videoconferencing platform perfects simultaneous audio, use air traffic control.

Go to [bit.ly/evmair](https://bit.ly/evmair) to see a video of a professional host demonstrating air traffic control.

*Get productive with virtual tools.* A virtual meeting is about getting work done. We all have to meet to get our job done. As the host, you need to value the time even more, because as soon as you log in, you start an invisible timer to each attendee’s “I’m done” factor, or when they cease to be productive. Virtual meeting fatigue is real and you’re doing everyone a favor if you can get your collaborative work done and get back to nonvirtual meeting work. Arrive on time. Plan. Value each other’s time. Make decisions everyone buys into. Document your decisions. Get out. Your attendees will feel valued and more engaged if you can host productive virtual meetings.

Go to [bit.ly/evmget](https://bit.ly/evmget) to see a professional host working with attendees to get productive with virtual tools.

*End your meeting on a high note.* You want your attendees to have more energy after your meeting. Product teams did research on product demonstration meetings. They discovered that if you end your meeting on a high note, customers are more likely to buy your product.<sup>2</sup> Your meetings are exactly the same. If you can find a way to end positively, your attendees are more likely to come back and they are more likely to be engaged. Ask for feedback. Do a cheer. Play a video. Celebrate success. Say thank you. Then log off.

Go to [bit.ly/evmend](https://bit.ly/evmend) to see a professional host end their meeting on a high note.

## The ENGAGE Method in Depth

### *Engage and Interact with Every Attendee*

As the host of a virtual meeting, one of the ways to create engagement is to engage with every attendee.

Engaging every attendee solves one of the biggest problems with virtual meetings, which is logging in and feeling left out. Every attendee wants to feel valued and know that their work is meaningful. All you have to do is engage them, which you can do by talking to them, by chat or by one of the many virtual tools available to you.

In a one-on-one meeting, you'll find it easier to be engaged in the conversation. As more and more attendees join your meeting, you'll have to think about different ways to engage with every attendee. The following is an easy activity to engage with every attendee.

### **Check-in**

**Goals:** Show how checking in with every attendee can make your meeting more engaging. Ensure that every attendee's audio and/or video is working.

**Time:** 5–30 minutes

**Participants:** 2–25

**Technology:** Audio, video, chat

**Category:** Opener

**Game Summary:** Have every attendee check in by saying their name, location, and where they work.

**Rules:** Attendees must raise their hand to speak. If their video is not on, they need to raise their virtual hand or unmute and say their name. Choose one person to be air traffic control and if two people want to speak at the same time, the air traffic controller will choose an order. Every attendee must have an opportunity to check in. If an attendee's audio and video is not working, ask them to check in by text.

This is the most basic activity that can help you engage and interact with every attendee. You may see more engagement during your meeting after a check-in and you may see more engagement after your meeting if your meeting was successful.

The following is a collection of best practices.

*Hello:* Make sure to greet every attendee as they arrive for the meeting. There's nothing worse than arriving in a strange new location and having no one talk to you. Think of yourself as the greeter or welcoming host to your virtual meeting by saying hello.

*"A person's name is the sweetest sound":* This quote comes from Dale Carnegie's book *How to Win Friends and Influence People*. Use an attendee's name as often as possible. If someone is new, ask if you are pronouncing their name correctly. If you get the pronunciation, make a phonetic note on how to say their name. Make sure you have the correct spelling when you edit or transcribe their name. There's no faster way to disengage someone than to miss a detail like their name. Using an attendee's name is a sure way to engage them, as they will look back to the screen and figure out what's going on.

*Chat:* If your meeting starts to be bigger than 15 attendees or if you have a lot of presentation material, then you can use chat to engage your guests. Even if you are in the middle of a discussion with an attendee, you can send a quick "Hello" chat to someone who just logged in without disturbing your conversation.

*Engage Your Quiet Attendees:* One of the most common challenges is getting attendees who have their video or audio off to engage in the meeting. These attendees are quite often shy or introverted. Help create a safe environment for your attendees to contribute. A good practice is to wait longer than is comfortable for you when you ask a group question. Allow the attendees to figure out when they want to answer the question. The reason this will get your quiet attendees to engage is because they are offering to talk when *they* are ready, not when *you* are ready. A professional host shared that he had an attendee who did not want to turn on her camera. The host thanked her for sharing by audio. The host continued the meeting and eventually the attendee offered to answer a question on her own. Later in the meeting, the attendees were tasked with writing in a shared document. For this quiet attendee, it turned out that writing was her passion. This attendee went on to write 75% of a work assignment. The host believed she contributed because she felt safe. Google conducted 18 months of research for high-performing teams and discovered that psychological safety is one of the top five factors. Creating psychological safety in your virtual meetings will help them be more engaging. See Chapter 3 for more on psychological safety.

*Log in Early/Stay Late:* The most important meeting is the meeting before the meeting and the meeting after the meeting. One of my strategies for being the host of a virtual meeting is to log in 10–30 minutes early and stay logged in for 10–30 minutes after the meeting. This will give you extra time to meet your attendees and get to know them better before everyone is logged in. Also, it will give you time to have extra conversations after an important meeting to clarify and plan. I discovered this secret while working at Microsoft. I was able to have important conversations with busy but important developers, executives, and employees who were too busy to schedule a one-on-one. I got the information I needed and I accelerated many projects and relationships this way.

*Create a Checklist:* In smaller meetings, from 5 to 15 people, you can ensure that you have engaged every attendee by creating a simple checklist of every attendee and making sure you check off each one as you engage them with a question, a report out, or a chat. Make sure to find a way to end the meeting by attempting to engage everybody at least once.

*“Pass”:* Allow an attendee to say “Pass” if they are called on during a meeting. The key here is to not force someone to engage if they don’t want to, and allowing them to pass is a simple way to do that. This means that they don’t have anything they’d like to contribute or they would rather use the time for something else, while making it known that you made an attempt to engage with that person.

*Let the Inmates Run the Asylum:* An incredible strategy to engage your audience is to give control of the meeting over to them. The original concept derived from Edgar Allan Poe’s “The System of Dr. Tarr and Professor Fether.” Here, it means that you let the attendees run the meeting. If you find ways to hand over control of the meeting to your attendees, they become immediately engaged.

The Association of Talent Development (ATD) states that the top three adult learning theories are:

1. *Adragogy: Tapping into prior experiences.* This means that adult learning attendees arrive already smart in many areas and you should let them share their expertise.
2. *Transformational learning: Revealing perspectives to create aha moments.* This means that you should help create adult learning experiences where attendees can draw their own lessons or *aha* moments. Whatever an attendee decides to get out of an experience is 10 to 100 times more powerful than anything the presenter will ever say.
3. *Experiential learning: Tying reality to create meaning.* This means that you should create adult learning where attendees get to try something themselves and create meaning out of that experience. If you let them do something, they’ll engage.

For instance, the activity “A to Z” (see Chapter 8) is a case where after you teach how the activity works, you let the inmates run the asylum, which means that you turn over total control to the attendees. Resist your urges to assist or coach the attendees. Ideally, do nothing. Have a backup plan at key points to give hints without giving a solution away. If you give the solution to the attendees, you rob them of the learning lesson and they will take nothing away, except to give you their problems. If your attendees own the solution, they will also own the learning they derive from the activity.

*The Participation Map:* When your meeting grows to more than 15 attendees or if you have a more complex meeting, such as a learning meeting, consider using a participation map. A participation map can help you recognize common patterns of problem meetings, such as one or two people dominating the meeting, certain members contributing nothing, and helping shy attendees turn on their camera or engage.

Use our template or make your own. On the left side, write every participant's name, in alphabetical order by first name so they are easy to find. On the top, write your key goals or time marks. For this first participation map, you can use "Logged In, Checked In, Chat, Share, End." When you conduct your meeting, make a checkmark or write a comment anytime someone participates. If someone participates too much, make sure to call on other people. If someone does not participate at all, make sure to check in with them. Remember that you can allow them to "Pass." Checking in with them lets them know they were given an opportunity to contribute as opposed to feeling ignored or left out. You can use a spreadsheet if you have multiple screens or you can print the map if that is more comfortable for you. Inclusion is a powerful engagement tool and it will help engage all your attendees of various personalities and styles. This can be difficult for one person to do, so this is one of the first roles I delegate (see "Never Lead a Meeting Alone").

Engaging Virtual Meetings 1	0:05	0:15	0:25	0:15	0:30	
Participation Map	Air Traffic Control	Good Looks	Shared Document	ENGAGE	Last Word	Q&A
	1:30 PM	1:35 PM	1:50 PM	2:15 PM	2:30 PM	3:00 PM
	1:30 PM	1:35 PM	1:50 PM	2:15 PM	2:30 PM	3:00 PM
	0:00	0:00	0:00	0:00	0:00	0:00
Screen Name	Air Traffic Control	Good Looks	Shared Document	ENGAGE	Last Word	Q&A
Christina Hake - Sacramento, CA - Avery Murphy, LLC	Enjoying weather, SO	Change photos	x	x	Enjoyed	
Debbie Ann Schneider - Queens, NY - Geoteaming	Out of eggs	More lighting	x	x	Learned a lot	
Fatima -, -	Out of almond milk	Add art	x	x	I like the poem	
Maha -, -	Taking online courses	Interesting items	x	x	air traffic control	
Mahanned -, -	No gym	Something	x	x	I needed you 2	
Mahoud -, -	Spending time with	Wear nice	x	x	thank you!	
Maryam -, -			x			
Perry Lam - Hong Kong, HK - LAM Institute	Jeddah, cook for	Add bookshelf	x	x	Participation	
Quoc-Hoan Do - Federal Way, WA - Speaker	Reading books	Put up logo	x	x	I'm improving my	

Source: Used with permission from Microsoft

In this participation map, you can see the attendees' names on the left. The names are sorted by first name so it's easy to find them. On the top of the document, I have the plan for this meeting. I have the Planned Time and the Actual Time, which I fill in with the time I start the activity. During the meeting, I can enter the time I start and it will help me calculate if I'm ahead or behind schedule. The name of every activity is at the top so I know where I am in the agenda. You can see comments made by the attendee in the Air Traffic Control column. All of these notes help the host know if they have engaged everybody. The host can create more engagement by reusing comments that were made earlier.

Go to [bit.ly/evmmap](http://bit.ly/evmmap) to see a professional producer edit a participation map during a meeting.

During my trainings, I show my participation map toward the end of the meeting to show what we have been doing. For most attendees, this is the biggest surprise because they didn't see it coming. This is the biggest takeaway, as almost none of the attendees were using a map before the training.

I've been using participation maps since 1999 to track participation on teleconference-based trainings. The response was enormous then and continues to be now. Many non-engaging meetings are dominated by one person and leave many people out. Use participation maps and you can balance your meeting's engagement.

I find when we're doing our calls, two people are stone rolling the whole meeting. They are going off and nobody gets a word in edgewise. The participation map will be very useful for fixing that.

**Christine Wagg, Ontario, Canada**

The participation map I absolutely *love!* I can't wait for you to share that!

**Julie Rocks, corporate trainer, Costa Mesa, California**

You taught me something very important with the participation map. I never saw that coming! That was *tremendously* useful.

**Jegatheeswaran Manoharan, Accordia Training & Development, Malaysia**

Virtual meetings have a variety of engagement tools. The most important one is you. Be engaging and your meetings will be engaging, too.

### ***Never Lead a Meeting Alone***

If you are new to virtual meetings, there are a lot of different elements to creating an engaging meeting. In a face-to-face meeting, you've had years of practice to notice body language, watch for breaks in the conversation, and see when people are engaged or not. In virtual meetings, you need to relearn how to do all this.

The fastest way to make your meetings more engaging is to never lead a meeting alone. This means meeting as a team and delegating key roles, as necessary, to other attendees. This has the side effect of engaging them during the meeting because they have an important role. By meeting as a team, you can focus even more on being the host or presenter of your virtual meeting.

While you don't need to delegate if you have a one-on-one meeting, consider delegating when you have 15 or more attendees or if you have a specialized goal for the meeting, such as training or data review.

**Common Roles to Delegate**

- Schedule and invitations
- Pre-meeting preparation
- The participation map or checklist
- Chat
- Share
- Scribe
- Speaker handler
- Security
- Post-meeting follow-up

When I launched new online classes in March 2020 in response to the coronavirus pandemic, I did everything myself. I created a new meeting on Zoom. I set up registration. I did marketing on email and social media. I logged in 30 minutes early to greet guests. I started streaming to Facebook LIVE. I muted people who were loud. I ran my own slide deck. I presented and facilitated everything. I engaged people in chat. I held up signs when people were on mute. I kept a participation map to ensure everyone engaged. I stayed on for 30 minutes afterwards to answer questions. I did this for over 20 meetings. And then I suddenly realized, I forgot to hit record. All this work and no post-event marketing value. I was exhausted. I was deflated.

Then, an amazing student named Gil Peretz, the co-founder of [PositiveChutzpah.com](http://PositiveChutzpah.com), gave me this wisdom: never meet alone. Some of my best friends were interested in how I was delivering these meetings. Debbie Ann Schneider and I had already worked together at the top youth camp Global Youth Leadership Summit. Debbie Ann became one of my first producers. First, she tackled the participation map, and as the speaker I was able to focus even more on the attendees. Next, she took over chat engagement and then security and muting/unmuting. I was able to facilitate four programs in a single day by using a team. When I was asked to coach, co-produce, and co-emcee a 200-person four-day conference, we created a team of 36 people to handle one live conference, one Asia watch party, and one EMEA (Europe, the Middle East, Africa) watch party. Never lead a meeting alone. Each team member has a role and they are more engaged as a result. By dividing and delegating roles, you will be a better host and your attendees will feel more attended to because more people are helping them during your virtual meeting.

***Good Looks***

After you've followed the best steps from the Virtual Presence Primer (see Chapter 2), make sure you look good during your meeting. Center your head to the camera. Position your main screen as close as possible to the video window. When making a key point, take a moment to look directly into the camera.



Donna Cunningham of Seattle Genetics ([seattlegenetics.com](http://seattlegenetics.com)) drew eyes on a Post-It note and put it next to her camera to remind her to look at the camera as much as she would look at someone in the eyes during her meeting.

Looking good also means sounding good. If possible, meet in a quiet location. If this isn't possible, make sure to mute when you're not speaking. Most systems have a push-to-talk button, like the space bar, to help control your background noise.

One of the most common mistakes is forgetting to unmute if you're going to talk. Make sure to check your mute status before you start speaking. You might have been muted by the host. If you're the host, make sure to give reminders to unmute if you ask someone to speak.

Brad Cochrane, keynote speaker at [story1stmarketing.com](http://story1stmarketing.com), was one of the first to use visual signs during meetings. He wouldn't have to unmute. He could just hold up a sign that said Yes or No. I created a collection of useful and fun signs. The most popular sign is "You're On Mute." Here's a link to signs that you can customize: [bit.ly/evmsigns](http://bit.ly/evmsigns).

If you need to step away or take another call, there is no established etiquette. This is a place where your virtual meeting can establish an etiquette. In one successful virtual meeting, the attendee chats BRB or "Be right back" and then steps out. If necessary, they mute their microphone and turn off their camera. When they return, they unmute their microphone and turn on their camera and chat, "I'm back."

### ***Air Traffic Control***

One of the top problems with virtual meetings is people talking over each other. Until technology comes out where attendees can talk at the same time, nobody can understand anything when two or more people talk. To maximize your virtual meeting, create systems to make sure that all audio is clear and understood by all attendees. Imagine that your audio channel is like air space and that you want to create air traffic control so you don't have collisions in mid-air. Good air

traffic control includes systems so that only one attendee is talking at a time and that someone is in charge of muting attendees who are loud by accident. This can include children, pets, lawnmowers, and other noises that are transmitted to your virtual meeting. If you're having a one-on-one meeting, you won't have to worry about this as much, but as your meeting grows in attendees, the problem grows. Attendees should raise their hand to speak, and if two or more people want to speak, the air traffic control person should choose the order.

To practice, just have every person check in, such as with their name and where they are calling from. Make sure every attendee has the opportunity to check in if you have 25 attendees or fewer.

Air traffic control also means maximizing your audio. If someone has noisy audio, such as moving, wind noise, background noise, leaf blowers, pets, or children, you don't have to say anything. As the host, just mute them and they will figure out how to unmute themselves if they want to say something. You can click their window and click mute or find them in "Participants" and click mute. Clear audio is critical to an engaging virtual meeting.

Go to [bit.ly/evmatc](http://bit.ly/evmatc) to see an example of air traffic control in action with a professional host and producer.

What's the value of air traffic control? KC Frankenberger at Reynolds Community College ([reynolds.edu](http://reynolds.edu)) asked to be air traffic control for a virtual meeting. She noticed that out of all the virtual meetings, the most work got done at this meeting *and* the team got the most work done in the day after the meeting than in any other day over the past two months.

### ***Get Productive with Virtual Tools***

Chat and Share are two of your top virtual tools. Chat is a way to communicate by text during the meeting. It's powerful because it's the easiest way to communicate while someone is talking. Share is powerful because it allows you to share anything that you see on your screen. It's the fastest way to have all attendees understand what you're talking about and get on the same page.

#### Chat

Because only one person at a time can talk effectively in a virtual meeting, chat is the second most powerful engagement tool in virtual meetings.

- After learning air traffic control, show everyone Chat.
- Have everyone chat "Hello" or their favorite hobby.
- Once everybody has chatted, encourage attendees to chat while other people are talking.

Chat engages attendees to focus on the meeting and give immediate feedback without having to wait.

This feature helps the extroverts in the group who think out loud and want to share their thoughts in real time.

Chat also helps introverts, as after consuming audio, video, and chats, they often have the right answer and one of their chats can change the entire meeting.

In a poll I conducted online, 41 out of 41 of my industry professionals said that Chat is required for engaging virtual meetings.



One organization turned off Chat because they had a negative experience with it and found it distracting. Further research showed that the attendees on chat were giving feedback that they couldn't hear, the content was pre-recorded, no one was responding to their chat in real time, and the meeting wasn't meeting their expectations. Instead of adding a chat moderator and responding to the feedback, they decided to turn off Chat. Turning off Chat did not solve the problem; it only silenced the feedback to the actual source of the problem. The lesson here is to listen to your attendees' feedback and respond quickly, especially if that feedback is on Chat.

If you have a larger meeting, consider assigning or delegating the responsibility of monitoring the chat to someone on your team. It's their job to welcome people by chat as soon as they log in, ask engaging chat questions, and acknowledge people who chat so they and others feel more comfortable chatting.

If you're attending someone else's virtual meeting, hit up the chat room. It's the fastest way to find out if the organizer or speaker is paying attention to chat. If no one replies, you know that they are not looking at it. For me, that is very non-engaging, the same as if a famous speaker ignored me. Quite often, I find that it's not the speaker I want to network with, it's the people who are replying to my chats.

*Share screen:* We all need to meet to get work done. Collaboration is one of the most powerful tools for teamwork. The first way to get work done is to create an agenda before the meeting.

Decide how you'll open the meeting, what you want to get done, and how you're going to close the meeting. Plan with people who will be presenting during the meeting. Send out the agenda to everyone before the meeting.

Learning how to share documents and videos is a key skill to getting work done. The following is an example using Zoom.

Click "Share Screen" and choose Screen 1.

Open up a document.

An easy way to show your attendees that you can get work done is to write a story. Write a story one line at a time; every attendee must contribute. At the end of the story, ask if everyone agrees with the story.

Another valuable exercise is to write the agenda for your next meeting.

If you have shared tools, such as Microsoft Office or Google Docs, email the link before the meeting and post a link in the chat during the meeting. Take the time to show your attendees that everyone can edit at the same time during the meeting.

To share a video, click "Share Screen," then click "Share computer sound";<sup>3</sup> choose Screen 1 and click "Share."

Without being face-to-face, Share Screen is one of the best ways to engage your virtual meeting attendees, collaborate, and get something done that everyone agrees with.

### ***End Your Meeting on a High Note***

Do you want attendees to want to come back to your meeting? Find a way to end on a high note. You can ask a simple question such as "What did you get out of this meeting?" and ensure that you have enough time for everyone to answer. If you have a large meeting, ask the question in Chat. If you are short on time, ask everyone to use the sign language for applause for the meeting organizer. Ask people to raise their hands next to their head, then shake both hands, which is sign language for applause.<sup>4</sup> You can end your meeting on a high note in under 30 seconds because it's easy to teach, no one has to unmute, and you've taught something new to every attendee.

Another way to ensure that you end on a high note is to play a musical, inspirational, or recap video. The video can be of this group meeting together in the past. It can be a music video with a song that every attendee identifies with. Music has the power to change everybody's mood. The video can be an inspirational video that will leave attendees feeling uplifted before the meeting ends.

You can acknowledge others in the meeting. Acknowledgment doesn't cost anything and it's shown to be a key factor in high-performing teams. A Globoforce research study in 2013 showed that 89% of people are more motivated by being told what they are doing right than by being told what they are doing wrong.<sup>5</sup>

Whatever you do, budget time to close your meeting on a high note.

# 2

## Preparing for Virtual Meetings

### **Good Looks—The Virtual Presence Primer**

If you want an engaging virtual meeting, look good. Be camera ready. Clean up. Dress as you would for an in-person meeting. Check your teeth and your hair. Make sure everything in your background supports who you are.

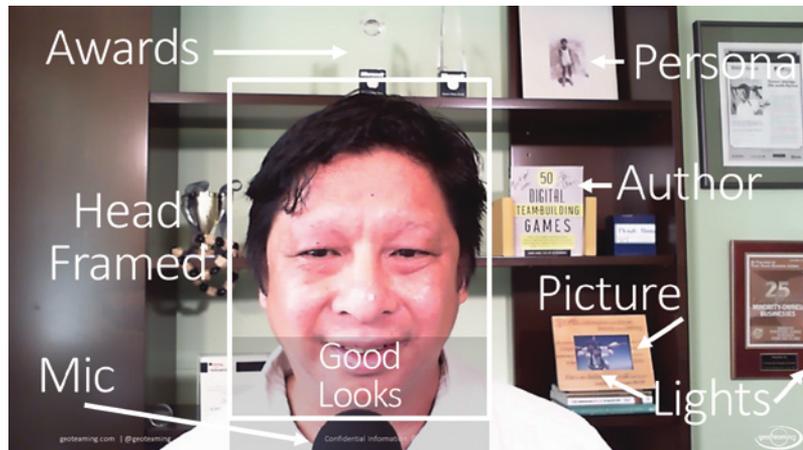
Here is a picture of me on my computer hosting a virtual meeting.



What do you see in my background?

What does it mean to you?

What does it tell you about me without me saying anything?



Everything in my background is there for a purpose.

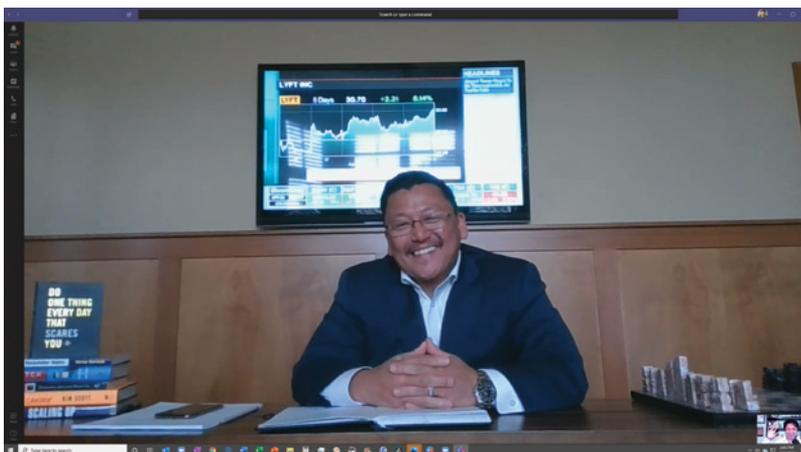
In this example, there are awards, books, pictures, and personal items to tell you something about myself and the company I work for.

I use two LED light panels and a microphone to give my attendees my best presence. Using two lights removes dark shadows and ensures that my face is lit up well. Television studios use this technique to make sure their subjects look good. Bright lighting also helps your attendees see you clearly. If you have very little light, it takes longer for video cameras to collect enough light and an attendee will see a blurry video if you are moving around. This results in the attendee having to use more brain cycles to understand what your video panel is doing, resulting in more video fatigue for your attendees. In the Engaging Virtual Meeting Speaker Checklist (later in this chapter), I give options ranging from \$20 to \$149 for your setup.

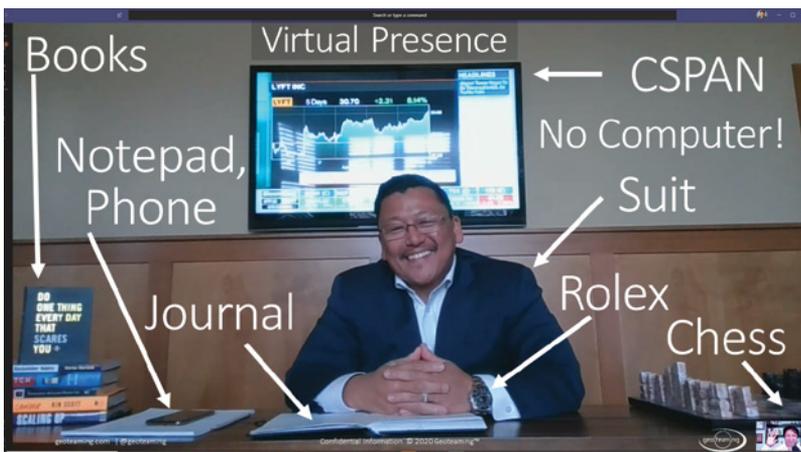
I realized that good looks were important to virtual meetings in 1990. I noticed that even famous people calling on Skype were in their kitchens or other unflattering locations. I felt like it was hurting their hard-earned brands. I took the time to create my first designed-for-Skype office for my friend. He positioned his laptop where it would be for a Skype meeting. He turned Skype on and I evaluated everything I saw on his screen. We removed everything from his back wall, and he painted it a color that matched his brand. Together, we placed three objects to his left and three to his right. These objects were important to him and included his company's logo, an award he won, his favorite photo with a famous person, a picture of his family, and a picture of his favorite hobby.

After 30 days, he called me. During that time, most people didn't say anything about his background in the beginning of the call, but many of them commented at the end of the call that they appreciated his background. Many of them said they were going to improve their backgrounds. Most of all, he said he was statistically closing more business!

In a virtual meeting, your virtual good looks is all you have. Set up your camera or computer where you're going to meet and do everything you can to improve what attendees see in your window. The background of our videoconferences is key to the image we present of ourselves.



My friend Paul Kim saw one of my social media posts and he immediately changed his office to this. What do you see?



Paul is the chief revenue officer of Launch Consulting. He meets with a lot of top executives and he wanted to communicate the feeling of a newsroom when his clients met with him.

Paul cleaned up, shaved, is in his suit with no tie, and has his Rolex on. He's telling me that he's ready for business and he's successful.

He put a chessboard in his office, telling me that he's strategic and thinking ahead. Others may think that he likes chess or might be a chess collector.

He put CSPAN in his background, telling me that he's keeping up with the latest news and financials.

He set out books, specifically *Do One Thing Every Day That Scares You*, which tells me he is a calculated risk-taker and willing to innovate. By the way, I looked this book up and it currently costs \$1,012.90 in paperback because it's out of print.

Paul has his notepad and his phone with no case, telling me he's a minimalist.

He has his journal, telling me that he likes to keep notes and values reflection.

What's most striking is what Paul does *not* have in his window—a computer. Just by putting his computer further back, Paul gives the illusion that he is not on a computer like everybody else; he's giving the feeling that you are sitting in his office. As the chief revenue officer, he knows the one thing he needs most is trust and he is using his window to create an experience just like his old face-to-face culture.

This is one of the best and most creative virtual presences I have seen in my lifetime.

Here's a memorable example of “bad looks,” or what not to do, from my friend Cynthia Clay, president of NetSpeed Learning Solutions (<https://netspeedlearning.com>), which helps people to be online instructors:

My best/worst virtual meeting was our staff retreat. We invited a guest speaker to do some virtual team building with our virtual team. She was on camera leading some activities. After an hour, we decided to take a break and she asked me how to freeze her camera. I explained, and, thinking she had paused her camera, she stood up and turned around. At that point, we realized that she was wearing only a lacy pair of Victoria Secret underwear on her lower half. She proceeded to bend over to straighten up items on the desk behind her. Whoa, we could all not unsee that. That birthed our memorable virtual meeting motto: Always wear pants!

Even *USA Today* knows that “What's behind you on that Zoom call reveals even more than what you say.”<sup>1</sup>

Do you want to see the latest in virtual presence? See <https://twitter.com/ratemyskype-room>. They rate famous and not-so-famous rooms with witty commentary and a score from -10 to 10.



**Room Rater** @ratemyskyperoom · Jun 5

The chair gets a 8 by itself. @TaikaWaititi reading James and the Giant Peach is 10/10.



8

21

750



Think about the best ways to improve your virtual presence (or the best ways to avoid disaster) as you learn about the Engaging Virtual Meeting Speaker Checklist.

## The Engaging Virtual Meeting Speaker Checklist

Complete this checklist to be one of the top 20% of all engaging virtual speakers:

- Computer, tablet, or phone: Make sure you have a computer, tablet, or phone that allows you to connect to your meeting. Place it on a stable surface. Use the fastest, most powerful computer you have, as that will let you do more while you are meeting. Reboot your device before a big series of meetings.
- Network: Find the fastest stable connection.
  - A fast network is important so that your video and audio is clear and your attendees see and hear you clearly.
  - Most programs require .5–3.0 Mbps (megabits per second) upload (sending to other attendees) and download (receiving from other attendees) speeds.
  - Test: Use SpeedTest<sup>2</sup> to find your real speed. Currently, I have a 71 Mbps download speed and an 18 Mbps upload speed, which is faster than recommended.
  - Direct-connect Ethernet using a cable to your internet.
  - Wi-Fi: Get as close to the Wi-Fi router as possible.
  - Upgrade your internet speed if necessary (if your attendees tell you that they can't see or hear you).

- Software: Update to the latest version.
- Multiple screens: Two or more.
  - Monitors: If you can connect two or more screens to your computers, do it. Studies show you can get a 20–30% increase from two monitors.<sup>3</sup> I use seven.
  - Computers, tablets, and phones: You can also use other computers, tablets, and phones as additional monitors. This can help watch multiple chats, look up items during a call, watch email, and prepare information to share.
    - On Zoom, you can show up to 49 people on one screen if your computer processor can handle it.<sup>4</sup>
- Speakers/headphones
  - Use the “Test Speaker & Microphone” feature of your app.
  - Find high-quality speakers.
    - I personally use speakers because I can virtually meet for a longer period of time without headphones. It looks and feels more natural.
    - I use the Edifier Exclaim Bi-Amped 2.0 Speaker System (e10) and Polk Audio’s Command Bar for loud karaoke.
  - Find high-quality headphones.
    - If you use headphones, make sure they are comfortable and loud enough for your meetings. I personally use Apple’s headphones and Polk Audio’s Noise-Canceling UltraFocus 8000. Look for top noise-canceling headphones online.<sup>5</sup>
- Mic
  - When you move to virtual, all you have is your voice and video. Here’s what you need to make your voice come through crisp and clear on your virtual meetings.
  - Use the “Test Speaker & Microphone” feature of your app.
  - Find the highest-quality microphone.
    - I personally stand by IK’s iRig Mic HD 2 at \$79–\$129.<sup>6</sup> I have had multiple people tell me that I sounded the best after listening to multiple speakers in a day.
    - One *Wall Street Journal* article with professional voice actor Jon Bailey recommends the Yeti at \$130 and the Snowball Ice at \$50,<sup>7</sup> while *Laptop Mag* found this most reliable, cheap microphone at \$20.<sup>8</sup>
    - You can plug most of these microphones into a USB connection on your computer, then select the microphone from the audio settings.
  - Echo
    - If you have echo, look for two or more devices that are connected to audio and are close to each other. Remove all but one by selecting “Leave Computer Audio.”
  - Background noise: Find a *quiet* location and minimize background noise such as pets, children, TVs, housemates, lawnmowers, and so forth.
  - Jon Bailey also recommends that you pick a room with soft, sound-absorbing material such as couches, rugs, and blankets. If you want to take it up a level, you can install affordable acoustic foam.

- KRISP: This is a noise-canceling application for PC, Mac, Apple, and Droid. It can remove noise from children, pets, restaurants, and so on.<sup>9</sup>
- Camera
  - Built-in: Use the camera built into your computer, tablet, or phone.
  - Clean: Clean your camera lens.<sup>10</sup>
  - Quality: Get the best camera possible.
    - Search for “top webcam”; best cameras are constantly improving.
  - Position: The camera should be approximately an arm’s length away at eye level.
  - Frame: Move the camera to frame your head in the center.
    - Do *not* point your camera too high and show only your eyes.
    - Do *not* have your camera too low and point up your nose.
  - Settings: You can lock your autofocus and improve your look through exposure with a \$.99 app, Webcam Systems Settings on a PC,<sup>11</sup> or the Mactaris Webcam Settings app for Mac.<sup>12</sup>
- Background
  - Clean: Remove extra items from your background.
  - Brand: Add your branding, such as your company’s logo or personal awards.
  - Personal: Add a personal item to help build rapport.
  - Virtual background
    - If you are using a virtual background, make sure it works and is appropriate for your meeting.
- Lighting: I recommend two LED panels as they look great at any time of day.
  - Put the lights to the left and right of your face to eliminate shadows.
  - Use natural light. Face a window that light is coming through; know what shadows come through at every time of day.
  - Use existing lights. I would remove the lampshade and put the light behind my computer’s camera, lighting my face.
  - Do *not* point your camera into a light; you will become a black silhouette.
- Good looks
  - Be camera ready.
  - Dress appropriately.
  - Change your onscreen name to a friendly name tag such as First Last, City, State, Company.
    - Example: John Chen, Seattle, WA, Geoteaming
- Ice water: Hydrate! If you are presenting, you and your voice need to be in top form. Have at least 32 ounces of ice-cold water, says Roger Love, top voice coach, whose clients include Anthony Robbins and Suze Orman.
- Clock: Look for a clock on your computer or move a clock directly below your center monitor, as some videoconferencing apps do not allow you to see your clock. This will help you to always know the time and make decisions based on the amount of time remaining for your meeting.

- **Agenda:** Create an agenda for your meeting. Allocate time to estimate how long you have for each section. Best practice is to make this a sharable document using Microsoft's OneDrive or Google Docs. Give access to all meeting presenters so they always have the latest version of the agenda.
  - **Open:** What will you do to open the meeting that helps your goals?
  - **Middle:** How will you design the middle of the meeting to meet your goals?
  - **Close:** How can we close this meeting with all members agreeing on the same goal?
- **Dry run:** Always meet before the meeting with all key members involved, including the meeting leader, the speakers, and the producer. Quickly test your agenda, transitions, and technology from audio and video to sharing documents and videos. Make changes to your agenda as needed.
- **Backup plan:** Make a plan for what to do if any of your technology fails. Make sure you have the telephone call-in number, a charged phone, and a backup battery.
- **Security:** Meet safe
  - Prevent Zoombombing (see Chapter 6) and unwanted visitors.
  - Passwords
  - Registration
  - Waiting room/lobby
  - Turn screen sharing off.
    - As host, know how to Share Screen to stop others from sharing their disruptive screen.
  - Remove disruptive or uninvited attendees.
    - Ensure that they can't come back.
- **Present:** Always be present and bring your A-game online.
  - Remove distractions.
  - Don't text or email.
  - Focus.
  - Be prepared.

### **Engaging Virtual Meeting Speaker Checklist**

- Computer, tablet, or phone: Reboot
- Network: Test speed
- Software: Upgrade
- Multiple screens: Two or more
- Speakers/headphones: Attendees sound good
- Mic: You sound good
- Camera: Pointing in the right direction
- Lighting: You look bright
- Good looks: You look good
- Background: You look good
- Ice water: Hydrate

- Clock: Meet on time
- Agenda: What are we doing?
- Dry run: Rehearse
- Backup plan: Plan B, C, and D
- Security: Meet safe
- Present: Be your best online



Go to [bit.ly/evmspeaker](https://bit.ly/evmspeaker) for the latest, downloadable copy of the checklist.



# 3

## Psychological Safety: How to Get the Quiet Attendees (and everyone else) to Engage

Google conducted groundbreaking research on what makes a team effective. Their research indicates that five factors are important for team and meeting performance. They are:



Let's focus on #1, psychological safety. Psychological safety is the invisible factor that helps your meeting become engaging. In every meeting, everything I do is to help create psychological safety for attendees I have never met and who have never met me.

Attendees do not engage if they do not feel psychologically safe. Your quiet attendees may be introverted, shy, challenged by being on camera, or for many other reasons. One way to know you are beginning to create psychological safety is that your quiet attendees take one new step. For instance, they contribute by audio. They choose to turn their camera on. They contribute to the meeting by chat. It is critical that the quiet attendee chooses to contribute, not that you called them out to do it. Attendee choice is a key factor for psychological safety. Most attendees like to have choice and be in control of their input.

One way to get your quiet attendees to engage more is to acknowledge or thank them. You do not need to draw unnecessary attention. For example, just a "Thank you (name) for contributing" will do. By acknowledging, there is significant research that says this reinforcement will get you more of the behavior you want.

To have a psychologically safe meeting, attendees need to be able to contribute. If you have an expressive and extroverted attendee who is taking all the airtime, you will need to moderate. A common complaint I hear is that one or two people are taking all the airtime during a meeting. To redirect, you can ask to hear from someone else. If necessary, ask the talkative attendee to choose someone else to hear from. If you have a very stubborn talkative attendee, you can say that their audio is having problems, so you're going to go on to the next person and come back. This is a technique another facilitator showed me from the early days of cell phones. The key is to not completely shut down the talkative attendee, just moderate the meeting so every attendee has a chance to engage.

The following are ways that you can create more psychological safety.

- Be organized: Attendees can sense if you planned and are organized for your meeting. If you're at ease, they're at ease.
- Be prepared: Being ready for anything gives the attendee the sense that they are taken care of. Knowing that they don't have to take care of other tasks, like muting people, means they can focus more attention to your meeting. Make sure to do research on your attendees. Be ready to demonstrate that you prepared for the meeting.
- Come in a ready state: I've always said that if you are nervous, your attendees will be nervous. If you are ready, your attendees will be ready. You can be technically prepared for a meeting, but if you show up in the wrong mental state, it can affect your entire meeting. How you show up to your meeting is critical to your attendees' psychological safety and your meeting's result. Even if you've had a challenging situation before your meeting, find a way, such as deep breathing, to collect yourself before you log in.
- Welcome: Welcome attendees as soon as they arrive so they know that this is a safe and welcoming environment. For instance, I presented to 40 attendees from Saudi Arabia. I made sure

to say “Asalamu alaykom” (“hello” in Arabic) at the beginning of my presentation. While I do not speak fluent Arabic, they appreciated that I welcomed them in their own language.

- **Acknowledge:** Take steps to listen and acknowledge what attendees are saying. If you can’t understand, ask the attendee to repeat. Learn the phrase, “So what I think I hear you say is . . .”
- **Be open-minded:** Even if you don’t agree with an attendee, find a way to have an open viewpoint by acknowledging and not judging what they said. A quick way to disengage an attendee is to tell them they are wrong. Instead, as the host, find a way to be open to new ideas and ask questions to learn more. If the attendee’s idea is not accepted, let the other attendees give that feedback.



- **Allow and celebrate mistakes:** When coronavirus hit in March 2020, it was the world’s largest disruption. People were making mistakes all the time because everything was new. Finally, I got tired of people saying “I’m sorry.” I created a “No sorry zone.” I just let people know that it was okay, they don’t have to say they’re sorry around me because we’re all doing the best we can. My friend, Cathey Armillas (<http://catheyarmillas.com>), made me this graphic, which I published on social media and got a lot of positive feedback.
- **Engage all:** Psychological safety is created when everyone is treated equally and fairly. I make sure to give every attendee the opportunity to talk no matter how they logged into the meeting. This prevents the meeting from being dominated by one or two attendees.
- **Choice:** Choice creates psychological safety because it puts attendees in control. During check-ins or openers, I allow people to participate when they’re ready. This small distinction is a big help as attendees realize that I will wait and they are in control. This means that the host needs to be comfortable with silence at the right times. The other way to create choice is to present and give multiple choices for attendees to engage. For instance, I allow attendees to say “Pass” if they don’t want to contribute. I make sure to present quickly for extroverts and slowly for introverts at different times.

- **Make a conscious choice about recording:** For most meetings, turning off live streaming and recording will create more psychological safety, as people know that they can say more—almost anything, if there is also a rule of confidentiality. If you detect there is a problem with psychological safety and you're recording, consider turning recording off and altering the discussion to talk about the real problem. In another meeting, a professional program manager encountered two teams who were fighting with each other. She turned on the record button and the announcement that the meeting was being recorded played for every attendee. The two teams reconsidered their words and the meeting got back on track. Decide how recording and not recording can benefit your meeting.
- **Authenticity:** There's nothing you can do to create authenticity. You need to be authentic. You need to be comfortable with yourself. You need to be comfortable hosting your meeting. You need to believe what you're saying and doing. You need to be telling your truth. This authenticity of allowing yourself to be yourself gives others psychological safety to show up and be themselves.
- **Believe:** If you believe you can create psychological safety and make a connection with someone halfway around the world, you can. I can tell you that I've been able to form friendships and do great work virtually because I believe it's possible.

When you have psychological safety, you should see positive results in your virtual meetings. Attendees begin to engage in ways that benefit your meeting more. Attendees start to exhibit positive behaviors that they didn't do before. Attendees are excited to come back. Attendees share personal stories that help deepen the relationships of the attendees with each other. Attendees have the courage to do things that are uncomfortable for them, like lead a presentation. Attendees create solutions that everyone follows up on when there is psychological safety. There is value for creating psychological safety and it's worth learning how to create it in a new arena such as a virtual meeting.

Zoe Euster, a project manager, applied psychological safety to her open mic virtual meeting. This was a meeting where people who don't usually perform, perform poetry, music, or whatever they'd like. It takes courage, as public speaking is the number-one fear that most people have. Read her results as she applies psychological safety to her virtual meeting:

When the coronavirus hit, I had very little experience with online events. In March 2020, I met John and was introduced to his online workshops. John taught me a lot in the first two months in training as a producer for the Engaging Virtual Meeting Workshops. I eagerly applied all I learned to my own event, a Zoom literary open mic called Words of Hope. Like his meetings, we started with intros and check-ins. The 15 attendees started to connect right away.

The spirit of psychological safety rang true through the whole event. Some of the pieces people read were very vulnerable. The readers were acknowledged and celebrated for their bravery. One person who had not written anything shared some thoughts. She had collected a list from

her friends on social media about what hope meant to them. As she read, the audience engaged through nodding and deep listening.

Even though many of the folks present had never met before, a feeling of community grew. Everyone engaged at least once, whether they shared their own writing or spoke up to praise the work of someone else. The meeting had air traffic control. People didn't talk over each other. It went smoothly because people really listened to each other and reacted accordingly.

Using Chat helped build the sense of community. People messaged their socials, email address, and examples of their work for folks to read. I liked how they connected during the event in Chat but remained engaged with the performances. As host, I could moderate the chat during the performances.

I spoke with a good friend who has been to several of my live performances over the years. She said that the online open mic was one of the best events of mine that she has been to. Much of that is thanks to what I have learned from John about creating online spaces where people feel comfortable and engaged. People at the event liked it so much they want to do more online open mics!

Source: Zoe Euster, Project Manager ([linkedin.com/in/zoeeuster](https://www.linkedin.com/in/zoeeuster))

