



DEB  PALMER GEORGE
WHOLE LIFE THRIVING

How to Make Virtual Meetings Effective

Part One

Imagine a football team that didn't warm up before a game, an orchestra not tuning their instruments before a performance, or a surgical team that didn't pause to confirm the procedure before operating.

You can't picture it because none of these professional groups would think of trying to perform together without first checking in.

It's essential that people performing together be in sync on what they're doing (*the game plan or what body part are we operating on*) and how they're doing it (*tuned to the key of G.*) In businesses a meeting is a basic element of organizational performance.

Why is it then that business professionals often begin meetings without a check-in to confirm what they're doing and how they're doing it. This is a reality that I've seen play out in countless in-person meetings. As we are now getting used to a world of virtual meetings, sometime 6 or 7 in a day, the practice of check-ins is essential at the start of online gatherings.

The practice of meeting check-ins isn't new, yet somehow it has been disregarded in the interest of perceived productivity. If you've ever been in a meeting that was derailed, where participants seemed to be reliving a previous meeting, unclear about the agenda, or if participation is uneven, you know that productive performance is not an automatic thing, it takes conscious effort.

Speaking of conscious effort, let's recognize that we are in a universal human crisis that impacts our universal human needs. We are learning to navigate uncertain circumstances without having many of our most familiar habits to rely on.

It is essential that we acknowledge this shared experience and our shared humanity, that we realize we are whole people wherever and whenever we are.

When we people are in stressful times, it is our breath that can serve to relieve stress and help us to connect with ourselves and others in constructive ways.

Here's a guided breathing exercise for the start of virtual meetings:

Greetings, it is good to see you all today (or say any greeting that works for you)

We're connected by a common purpose in our work and in this meeting today. We're also in very different settings. Let's take a moment to center ourselves and prepare for our time together.

Turn your attention to how you are sitting or standing, take a moment to adjust to comfortable position.

Now turn your attention to your breath, notice the inhale allowing the abdomen to gently expand ... notice the exhale allowing the abdomen to gently contract.

Continue breathing this way for 3 rounds on your own. (After the person guiding the breathing has done 3 rounds, go to next instruction.)

Now, turn your attention to your intentions for this session. What do you hope we will accomplish? What do you hope to contribute?

Take one more breath, open your eyes, and we'll begin our check-ins.

The breathing practice will likely help participants to center and connect with the experience at hand. It's a great lead-in to your check-ins. If you aren't practicing check-ins or need a refresher, here are a few guidelines.

What a check-in IS:

A check-in is a brief opening activity that engages each participant in responding to 1 or 2 constructive questions that help them get focused on the purpose of the meeting and centered within themselves so they can participate constructively. Check-ins allow people to connect within themselves so they can effectively connect with others.

What a check-in is NOT:

It's not an open-ended "How you doing?" Nor is it a random "does anyone have anything to share before we get started" or a way for people take control of a meeting by delving into a topic before the check-ins have been completed.

How to lead virtual meeting check-ins:

1. Communicate the why and how of check-ins before you start using them.
2. Clarify how long the check-in period will be at the start of each meeting. For example, "Let's take 5 minutes for everyone to check-in."
 - a. The timeframe for check-ins is based on the length and purpose of the meeting and number of participants.
 - b. A staff meeting where the agenda and topics was confirmed in advance may have a shorter check-in than a problem-solving or brainstorming session.
 - c. Ensure the check-in period is an item on the written agenda.
3. Guide participants on the length of an individual check-in. For example "Let's start with a round of 30-second check-ins"
4. Provide constructive questions for check-ins. Read the questions aloud and share the questions visually – on a slide, in a chatbox, or on the agenda. Examples of check-in questions include:
 - a. *What do you look forward to in our time together?*
 - b. *What can everyone count on you for in this meeting?*
 - c. *What has your attention today?*
 - d. *What are you feeling now?*
 - e. *What is standing out to you as we get started?*

These are commonly used check-in questions I've used over the years. There are numerous examples of other check-in questions on various websites. The best questions are developed intentionally to fit your culture and the purpose of your session.

Note: It's also helpful, especially in these times, to invite participants to also *"share anything that might be on your mind that by virtue of sharing it would help you to be more present during our session"*
If someone might be distracted by a sick child or waiting for a call from a doctor, they can share that without having to be distracted by what they'll do when/if it happens.

5. The check-in is guided by the meeting leader, facilitator, or is a rotating role among team members. Don't leave the check-in open ended. This is a purposeful activity that helps everyone get connected within themselves so they can connect effectively with each other.
6. If the group is too large for interactive check-ins, use the polling feature or chat box to invite check-ins. Allow a moment for the check-in results to be reviewed with the meeting leader acknowledging the check-ins.

Check-ins can make all the difference at engaging the best that people have to give, especially in challenging circumstances where it could be easy to be distracted. I hope there has been something useful in this overview for those reading. Maybe you were reminded of something you already knew, encouraged by something you are already doing, or maybe there was something new that will serve you and your team to have virtual meetings that are truly effective.

Virtual meetings are a potentially powerful way for people to meet their needs for connection and contribution. Something we all need during these times.