

# Best practices to conduct virtual meetings successfully

April 2020 version

# NOTE

This document was created within the framework of the ***ISO Virtual standards development process (IVP)*** pilot.

This document is shared with the technical community to help committees run their projects in a remote working environment.

These best practices are helpful for Chairs, Convenors, Committee Managers but you will find general information, tips and hints that will be helpful for participants as well.

The document will be revised regularly.

We hope this is helpful.

Before your first virtual meeting

# Define a protocol

## Consider the following:

- How do you want to conduct your virtual meetings?
- What will be the decision-making process?
- What level of participation do you expect?
- How will you address cultural or language barriers (if any)?
- What communication style will be used?
- Read the [ISO Code of Conduct](#) (introduce it to participants at the first meeting)



# The Checklist

This checklist (see Word doc.) will help you design and prepare your virtual meetings



April 2020  
Version

## Checklist

**NOTE: people currently located in US-embargoed countries will not be able to join a Zoom meeting.** Access this [link](#) for the list of US-embargoed countries

**NOTE: information related to video-conferencing (Zoom) is accessible [here](#).**

**Keep in mind the time zone of everyone attending the e-meeting.** Remember to consider the change of summer and winter times when scheduling a meeting. Here is an example of meeting planner you can use: <https://www.timeanddate.com/worldclock/meeting.html>

	When	Best practice	Explanation
<input type="checkbox"/>	Before the first Virtual meeting	Know your members	<ul style="list-style-type: none"><li>- It's important to know the expertise and cultural orientation of each members of the virtual WG.</li></ul> <p><i>Tips: ask each member to fill out a short biography and save it under Livelink. Everyone will know the subject matter expertise of each member and start associating the expertise with the individual.</i></p>
<input type="checkbox"/>		Define the virtual meeting protocol and explain the virtual interaction process	<ul style="list-style-type: none"><li>- Protocol and process will help members know and understand what is expected of them.</li><li>- Include a link to the ISO Code of Conduct to members.</li><li>- Define how decisions are going to be made, what level of participation is expected, how cultural and language barriers may</li></ul>



# Objective of the virtual meeting

# Define your objective

Think **SMART**

- **S**pecific – details exactly what needs to be done
- **M**easurable – achievement or progress can be measured
- **A**chievable – objective is accepted by those responsible for achieving it
- **R**ealistic – objective is possible to attain (important for motivational effect)
- **T**ime-bound – time period for achievement is clearly stated

See examples [here](#)

# Examples of objectives

Ill-conceived objectives	Why?	Well-conceived objectives
Raise the standards development process by 10%	Unreachable by the end of the meeting	Define the action plan that will raise the standards development process by 10%
Advance on the commenting problems of section c) of the document	Vague: what is the deliverable?	Identify the causes of the problems. Find solution to optimize processes. Set an action plan. Decide what to replace/change.

# Structure the virtual meeting

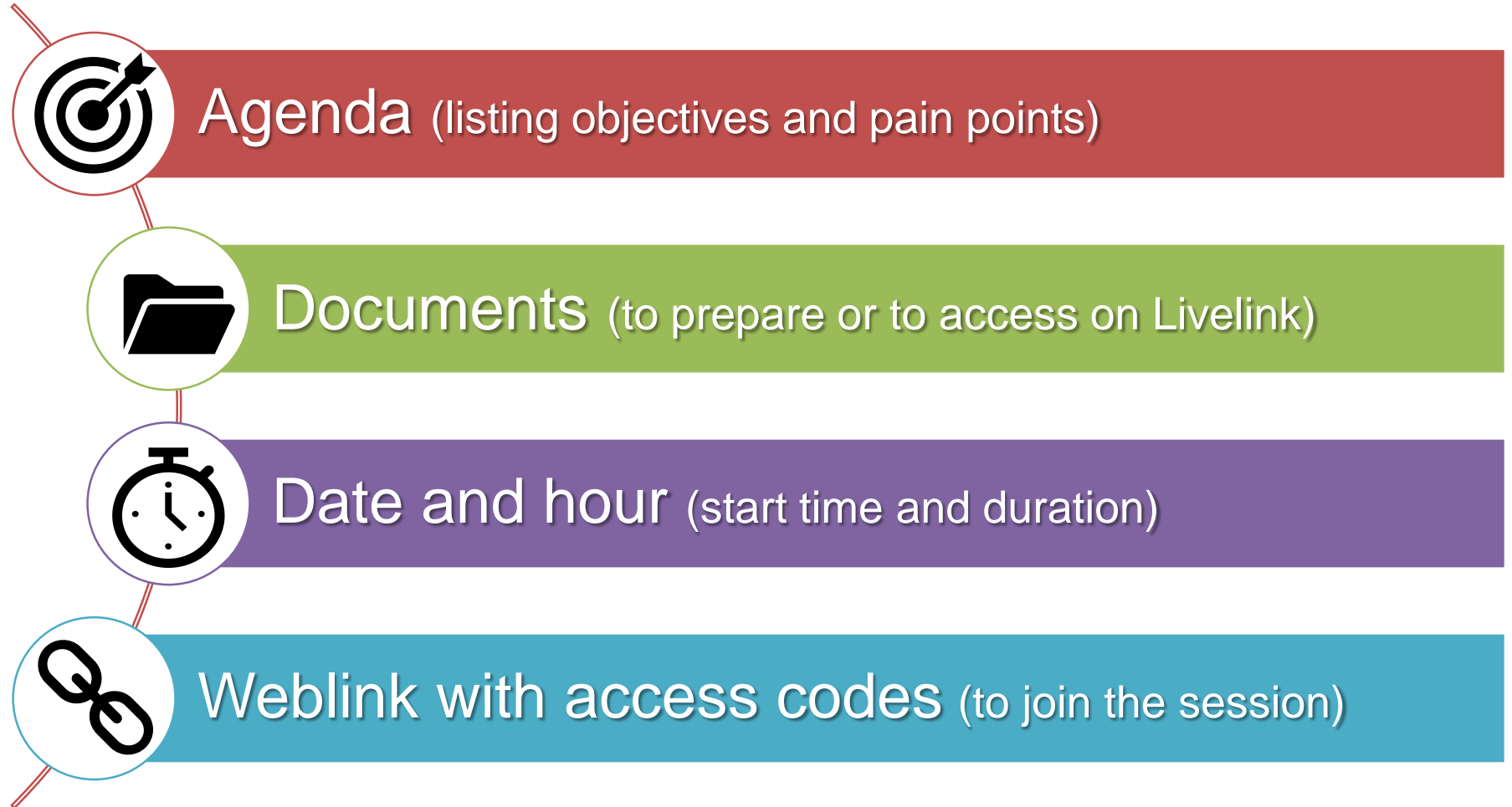
Objective of the meeting: Write here a defined deliverable		Total duration: Ex: 45 min.
Sub-objectives (max 3)	Activity*: interactions, specify tools and documents.	Duration for each section
1)		
2)		
3)		

*Tip: change activity to boost the session*

# Agenda

- Explain how each agenda item will be handled
- Is the item *'for discussion'* or *'for decision'*
- Dedicate appropriate time for each item
- Ensure ownership of each agenda item: *who will handle it, how decisions will be made, and how each member will be engaged in the discussion*
- Hot topics should be covered early in the agenda (*not at the end*)

# Virtual meeting invitation via calendar application



Always make sure to include the above information in the virtual meeting invitation and register the event in [ISO Meetings](#)

# Useful documents

Go to:

<https://isotc.iso.org/livelink/livelink/open/15507012>

- **Guidelines for Remote participation in committee meetings**
- **Project Management Brochures**
- **Zoom support** site for additional information and help about Zoom: <https://support.zoom.us>

# Settings



# Technical conditions

## What you need

Optimise sound	Appearance/image
Calm environment	Neutral environment
Headset and microphone	Professional appearance
Mute your microphone when you are not speaking	A virtual background if the feature is available
Use an external microphone or speaker (when > 1 person in the room)	



# Technical conditions

## Things to avoid

Sound	Appearance/image
Noisy items (bracelet, pens)	Backlight
Loudspeakers and amplifiers (feedback/echo)	Shiny accessories
	Striped clothing
	Slides overload



# What subjects/actions are fit for virtual meetings?

Do's	Don'ts
Information and Q/A session	Controversial/political topics
Project progress update	Meetings to announce a significant change
Collaborative work to produce a document (web meeting or teleconference + access to shared doc)	Brainstorming and creative sessions
Decision on one particular item	Complex and high-stake discussions
	When several items need to be addressed

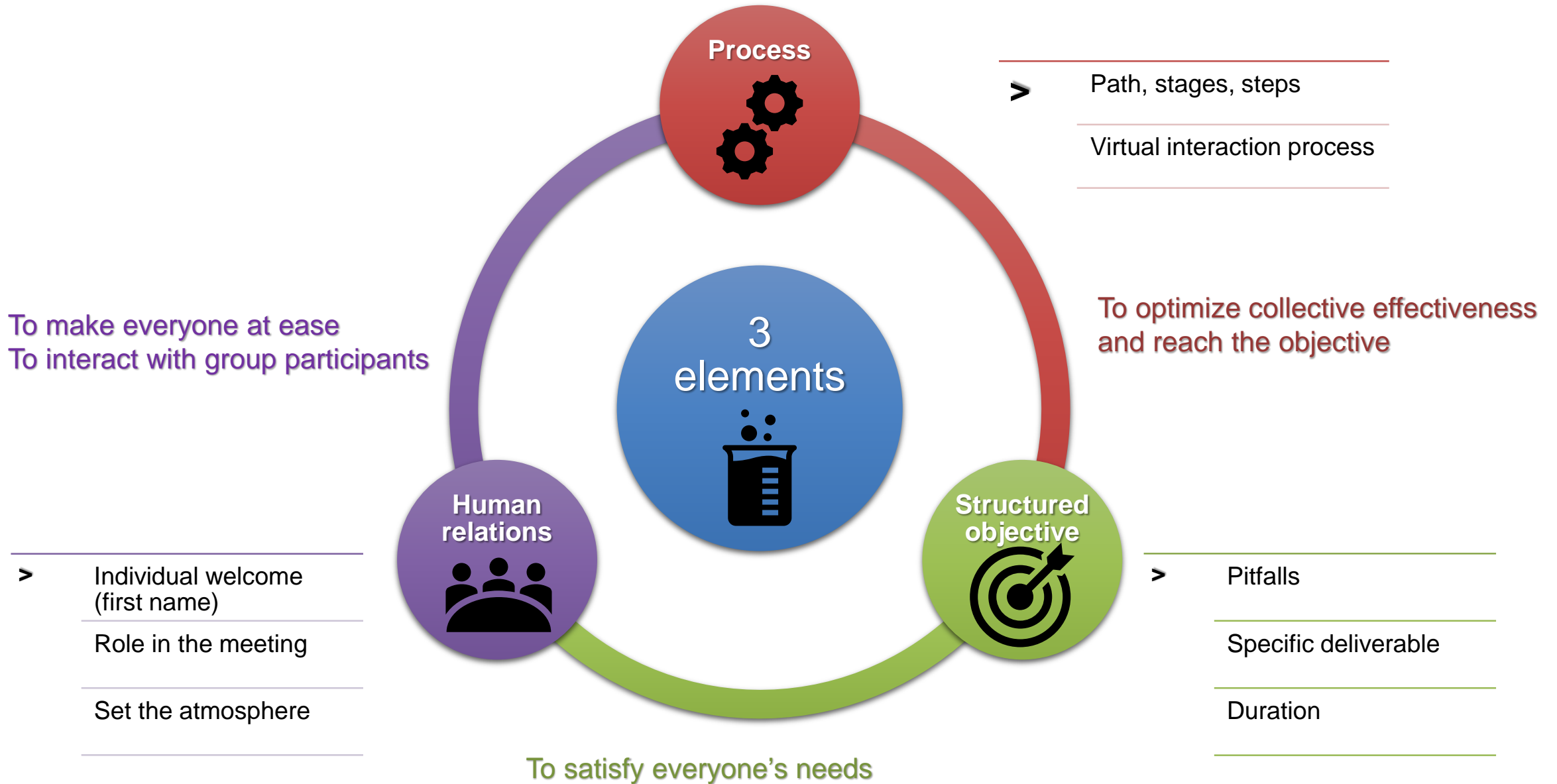
*When faced with imposed situations be extra careful when conducting the virtual meeting.*

# Starting the virtual meeting



# Introduction and interaction

- Make sure your **introduction** has **3 elements**
- Always explain **the virtual interaction process**



# Tips to interact virtually

- **Introduce yourself** before you speak
- **Raise your hand** as the conversation is progressing, so the moderator can call on you
- **Contribute** – prepare for the meeting in advance and actively contribute
- **Use the chat** to provide your input if you do not wish to speak or if you need time to formulate your point



# Tips to interact virtually

- **Ask clarifying questions that are specific when needed such as:**
  - *How can we improve xxxx?*
  - *Which line number are you referring to?*
  - *Which comment are your referencing?*
  - *Can you help me understand when xxx does not work?*

This is a collaborative project

- **Actively listen to others** – virtual meetings can be a challenge to hear and follow, active listening will assist you in being successful
- **Use the chat or yes/no option** to confirm you agree with a point from another participant – do not repeat information already presented

# Remote interaction with participants

# Ask questions!

- Use **open** questions
- Use **factual** questions
- Use **alternative** questions
- Use **closed** questions

See examples [here](#)

- Delve
- Clarify
- Understand

WHAT  
DO YOU  
MEAN  
?

# Examples of questions

## Funnel logic

Question type	Objective	Example
<b>Open</b>	Get an idea, opinion, expertise, analysis etc.	<i>'What is the cause of...'</i> <i>'How can we improve...'</i> <i>'What are your ideas about...'</i>
<b>Factual</b>	Specify, quantify, create a common reference frame for the group	<i>'What sub-section are you referring to?'</i> <i>'How many edits have we had this week?'</i> <i>'Who do we need to contact?'</i>
<b>Alternative</b>	Clarify, offer a limited choice	<i>'When you say 'consult' do you mean internally and externally?'</i> <i>'Do you prefer once or twice a month?'</i>
<b>Closed</b>	Obtain a specific information, validate a hypothesis, seal an agreement	<i>'Have you ever used the commenting function?'</i> <i>'Do you know the methodology...'</i> <i>'Can we plan our consultation on Tuesday?'</i>

# Engage with group participants

- ❑ Note who speaks (especially when the webcam is off)
- ❑ Engage with participants who speak the least
- ❑ Start your question using the first name of the person
- Make people feel at ease
- Take note of ideas/feedback of group participants

# Allocate speaking time

## The 4 Rs

1. Acknowledge **R**eceipt
2. **R**eact
3. **R**efocus towards the objective
4. **R**eformulate

*Feel free to interrupt to respect the timing*

# Acknowledge Receipt

**Be the angel's advocate!**

**Value the intervention of participants and their ideas**

Examples:

*What I like about your idea is...*

*What I find interesting in your comment is...*

*The issue you are raising seems important to me, because...*

# React

**Take the opportunity to steer the discussion with others, it will trigger a team/group dynamic**

Examples:

*What do you all think of this?..*

*John, you know well the situation, what is your view about this?...*

# Refocus towards the objective

To avoid the meeting being ‘hijacked’:

- Operate with a curiosity mindset (probe further)
- Restate the purpose of the meeting
- Be resolute and direct

Examples:

*‘I don’t see how your comments connect to the issue we’re talking about now. Help me understand how the two relate.’*

*If the person cannot explain, use the agenda to pick up where you left off.*



# Reformulate

To ensure you understand what people say:

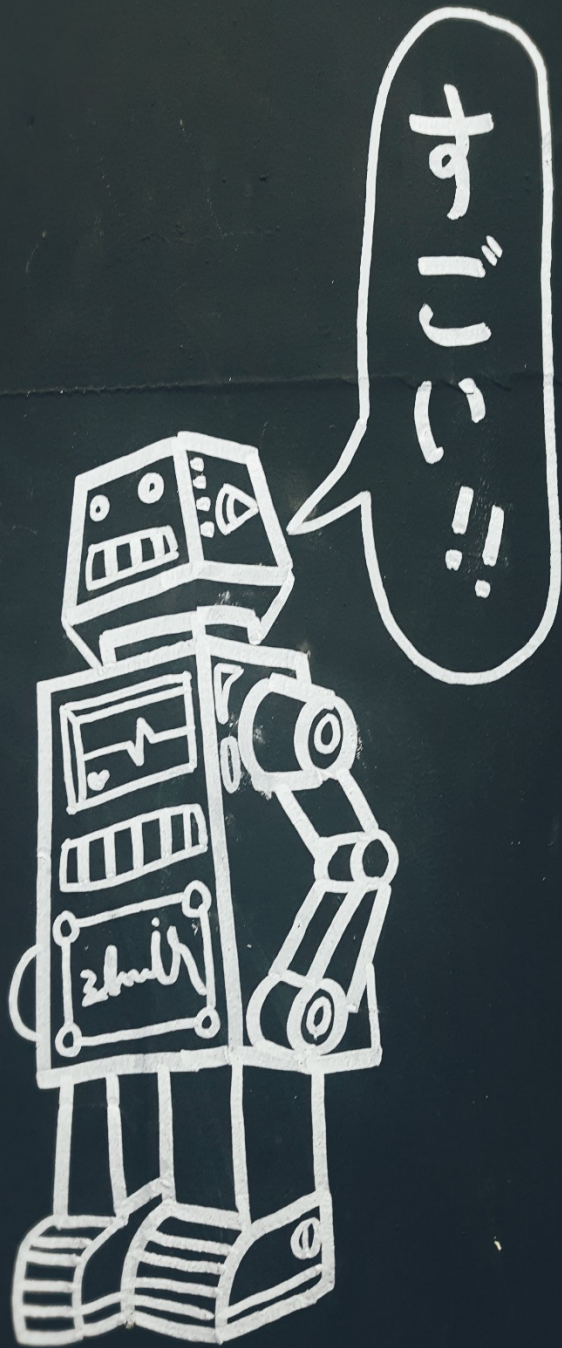
- Clarify facts
- Gather feelings perceived by people
- Satisfy needs
- Value ideas
- Summarize

Examples:

*If I understand correctly...*

*In other words...*

*In the end you fear that...*



# Consensus-building in a remote environment



# Definition of consensus

Consensus is defined in the ISO/IEC Directives Part 1 and Consolidated ISO Supplement 2019 (9<sup>th</sup> edition), as follows:

*“**consensus**: General agreement, characterized by the absence of sustained opposition to substantial issues by any important part of the concerned interests and by a process that involves seeking to take into account the views of all parties concerned and to reconcile any conflicting arguments.*

*NOTE Consensus need not imply unanimity.”*



# Common mistakes

## Communication

- Failure to clarify 'consensus'
  - [Tips](#)
- Failure to define a degree of agreement
  - [Tips](#)
- Making it difficult for people to state dissenting views
  - [Tips](#)
- Failure to clearly recap actions and decisions
  - [Tips](#)

# Common mistakes

## Misconceptions

- ‘Silence’ = ‘Consensus’
  - [Tips](#)
- ‘All cultures have the same consensus-building and decision-making approach’
  - Read the section ‘[Tips to build consensus in a multicultural working environment](#)’

## Organizational

- Schedule an important discussion or decision at the end of the meeting



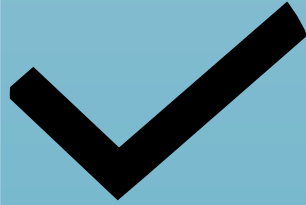
# Tips to clarify 'consensus'



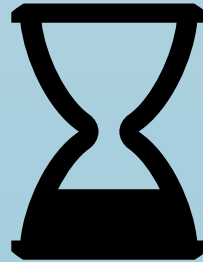
Present the definition of consensus



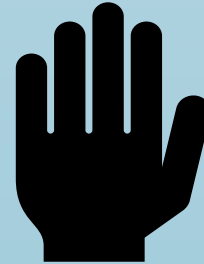
Agenda item 'for discussion' or 'for decision'?



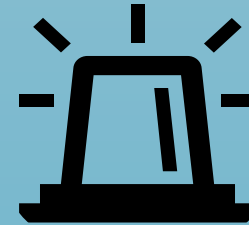
participants OK with summary, then move on to next item



Need to make a decision? Ask when they are ready to do so



Virtual hands (or verbal affirmation)

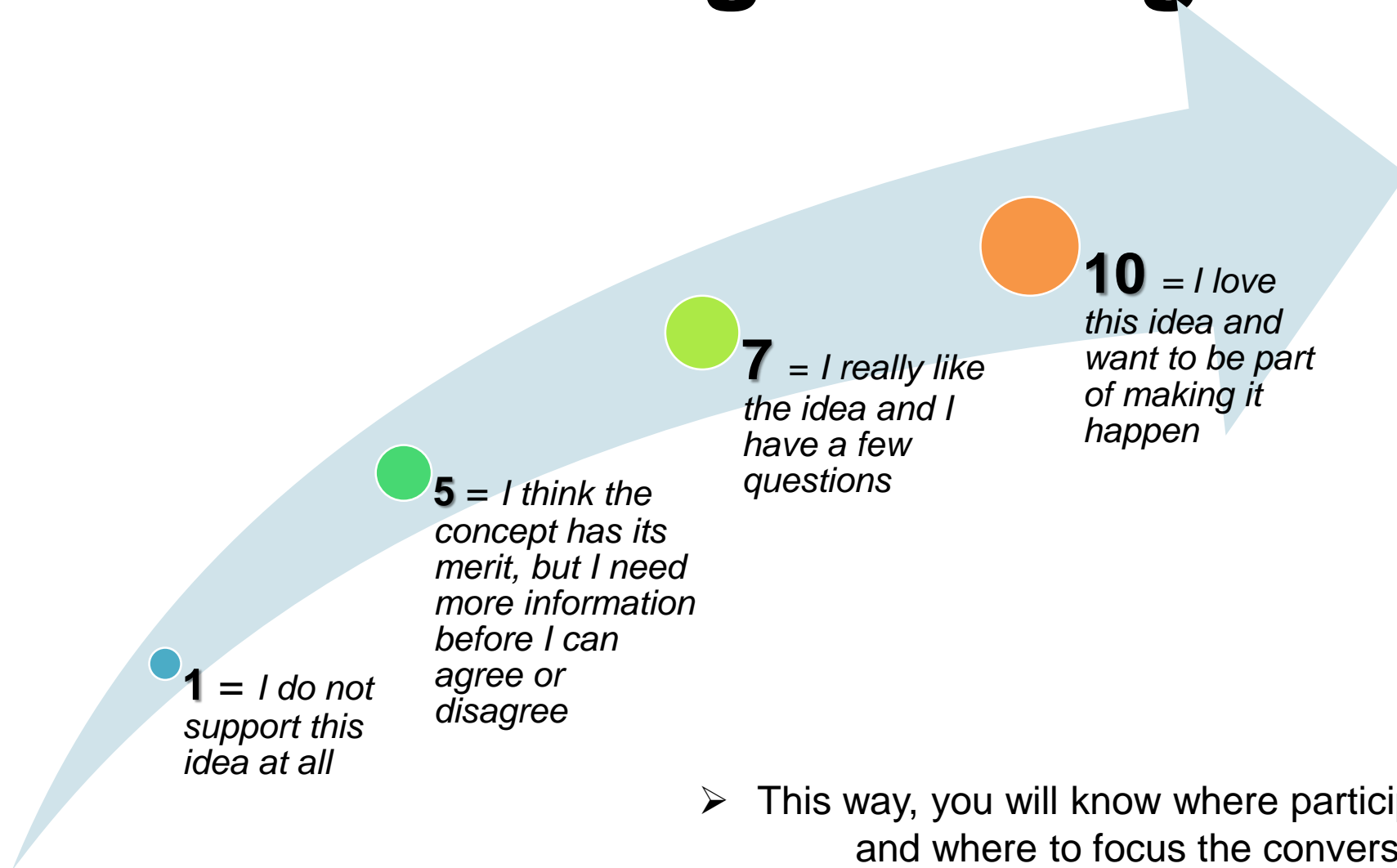


When ready proceed with decision-making process (vote at CD, DIS stages etc, whatever applies)



Minute the results of the discussion, decision

# Tips to define a degree of agreement



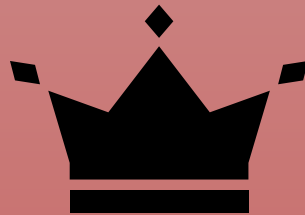
# Tips to help participants with dissenting views



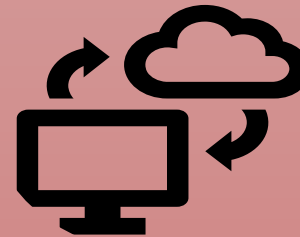
Ask questions that invite an honest response



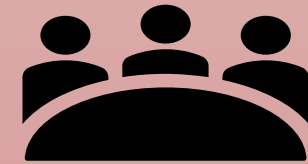
Then ask about potential risks and possible modifications



Use the [Six Thinking Hats approach](#)\*



Allow participant to state their views in writing



Make sure you hear from EVERYONE

# Hints to recap actions and decisions

## During the virtual meeting

Active minute taking will help you direct the group towards action. Make sure you highlight decisions, actions, who will carry out the task and always include a deadline. Minutes are a 'repository of agreements', they are very important!

## After the meeting

Send the minutes right after the virtual meeting, participants will feel engaged with concrete actions.

Decisions	Actions	Who?	When?

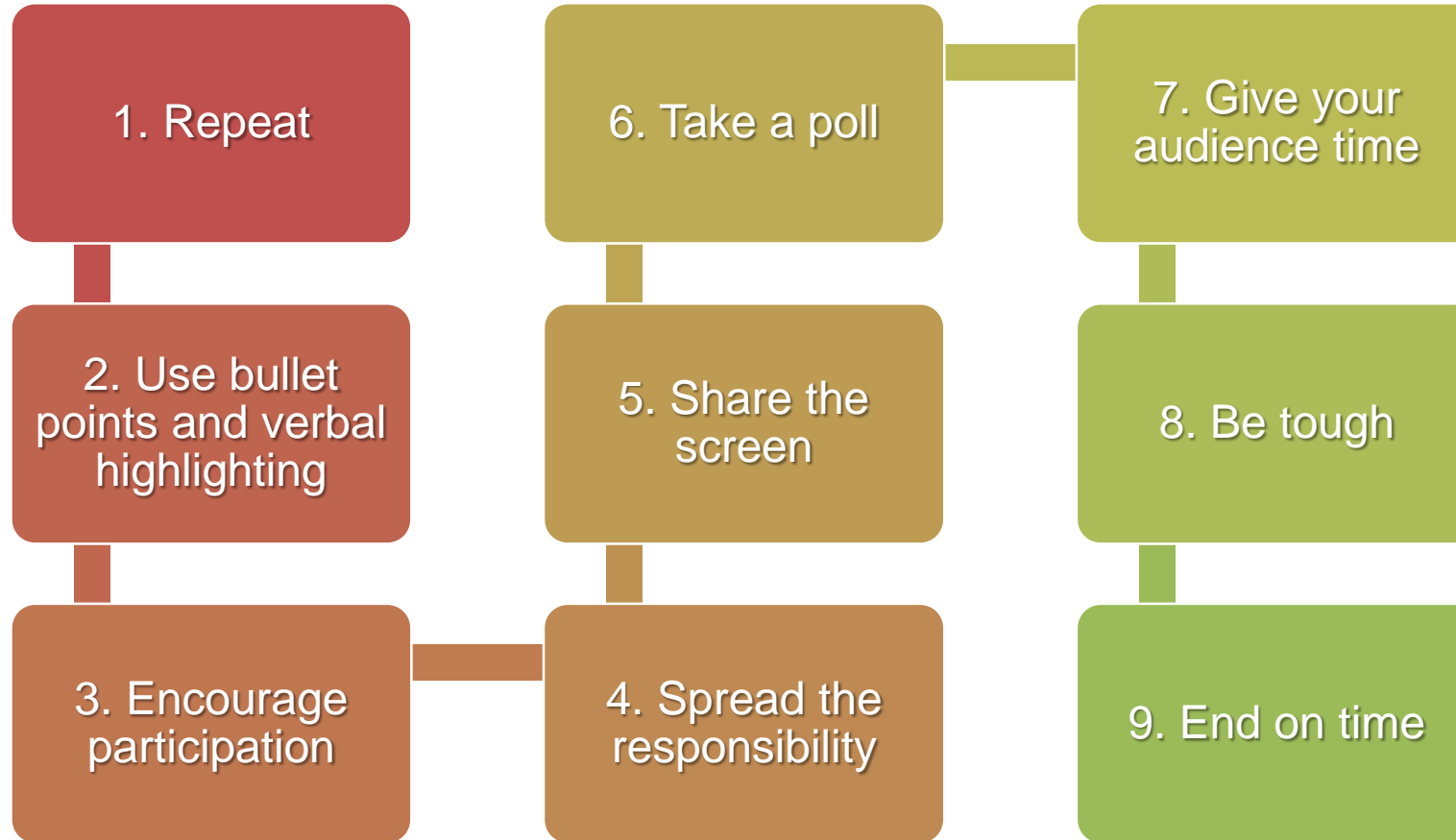
# Tips to avoid a 'silent meeting'

**Silence is an enemy: persuasive communication is key!**

- Hone your message to a strong and direct statement
- Know your audience (what you need them to know and what they want to know)
- Ensure information is clear and easy to follow
- Emphasize key points

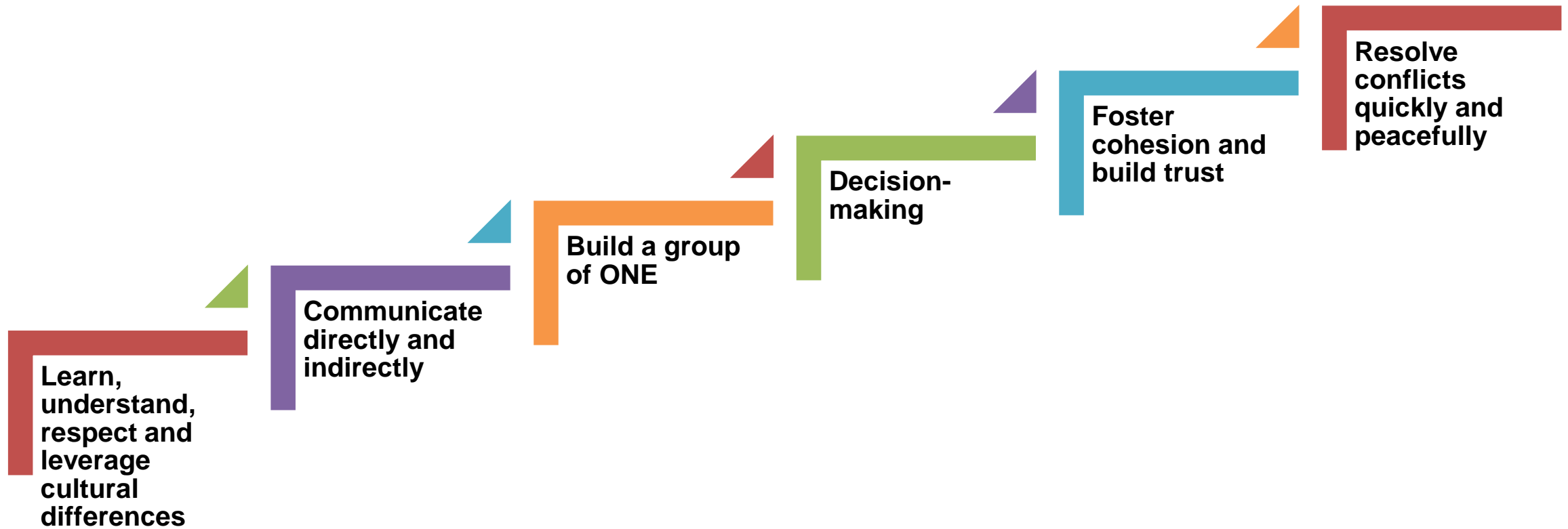
A **9-step approach** can help you should you apprehend to deal with this situation

# 9-step approach



# Tips to build consensus in a multicultural environment

# Steps to help you achieve consensus-building



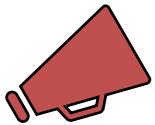
# Tips and things to keep in mind



## **Cultures**

They are influenced by age, gender, region, religion and social sub groups.

- ❖ Seek to understand before being understood.
- ❖ Show appreciation and respect to other cultures.



## **Communication**

Some participants will use direct, explicit communication in asking questions and identifying problems, while others are indirect in asking and responding.



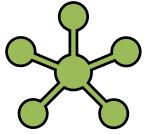
## **Build a group of ONE**

- ❖ Ensure participants have a clear understanding of the objectives, milestones, and timeline.
- ❖ Clarify each member's responsibilities and expectations in relation to other participants.



## **Decision-making**

Participants differ in how much information and analysis they need to make decisions. Participants from strong hierarchical cultures expect to be treated differently according to their status in the organization.



## Foster cohesion

Participants have to come together as a cohesive group to build strong working relationships to support each other, build mutual respect and trust.

- ❖ Having a common objective is a driving force.



## Resolve conflicts

Conflicts can occur due to cultural, language and communication differences. They have to be resolved as quickly and peacefully as possible. Remember that participants are allowed to have their voice to agree to disagree.

- ❖ Open the dialog and communicate clearly about the issues and bring participants back on track.

See [here](#) how to manage objections

# APAC

**Acknowledge** Agree the objection is important and valid

- Rebuild rapport
- Use AND not BUT

**Probe** Ask questions!

- Find the reason(s) of the objection
- Use WHAT, HOW, WHICH (not WHY)

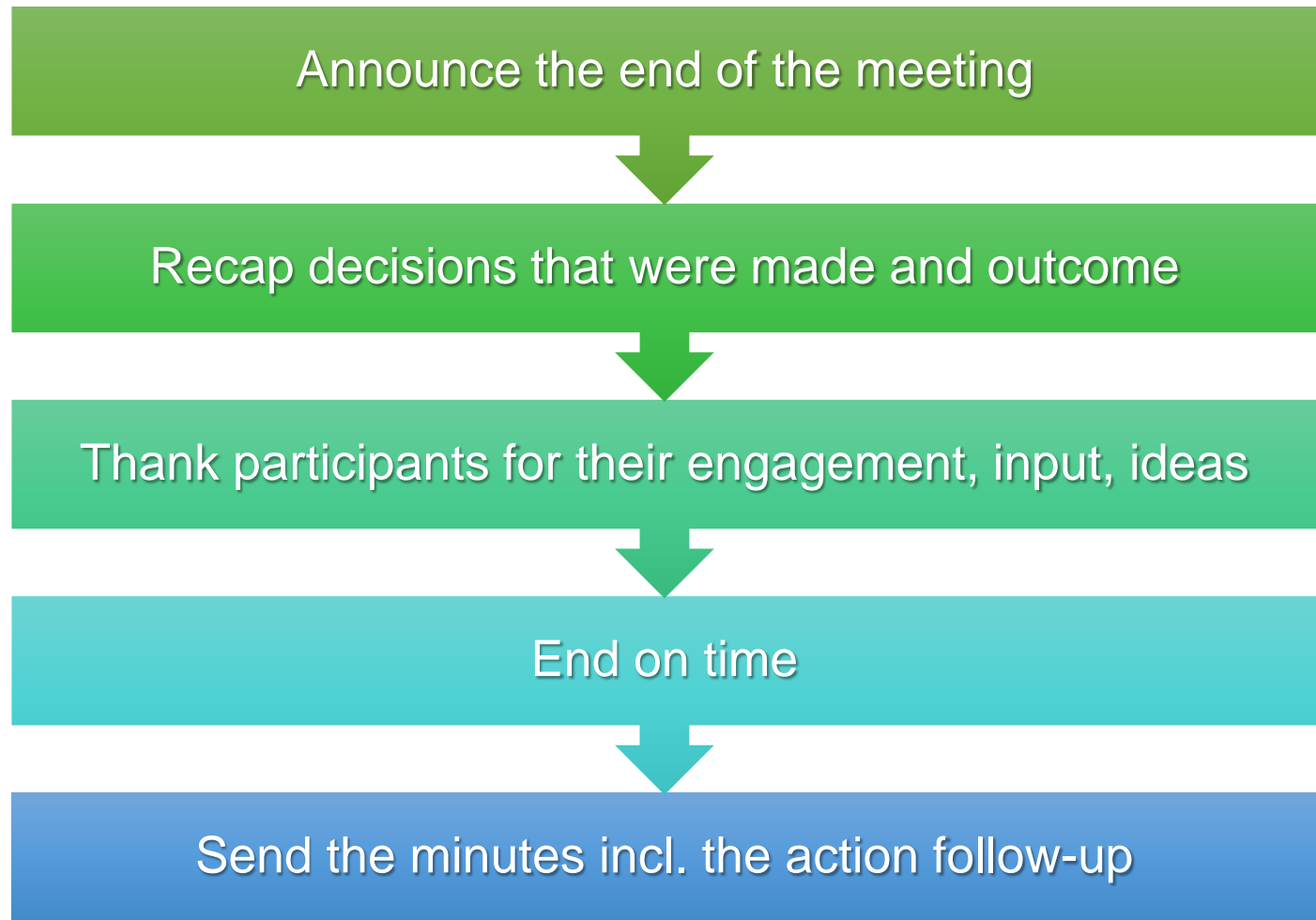
**Answer** Address their beliefs and concerns

- Provide evidence that shows that their concern is not actually a problem (assuming it isn't)

**Confirm** Does that answer your concerns with regard to your objection?

- If the answer is 'yes' move on to the next item
- If the answer is 'no' or 'partly' then start the APAC again

# Closing the virtual meeting





# Feedback on your experience

Share your experience when you conduct virtual meetings.

We welcome any comments, suggestions!

It will help us improve the practices.

Contact your Technical Programme Manager.

**Your feedback is valuable!**



# Assistance

For matters related to the project, contact your TPM.

For matters related to IT tools, contact helpdesk ([helpdesk@iso.org](mailto:helpdesk@iso.org))