THE ONUSIBLE MEETING



How productive was your last conference call?

CONTENTS

PREPARING FOR THE WORKSHOP	
VIDEO'S MESSAGE	2
HOW TO USE THIS GUIDE	2
KEY TRAINING POINTS	3
TRAINING APPLICATIONS	3
PLANNING THE WORKSHOP	
PLANNING CONSIDERATIONS	4
TRAINING LEADER'S CHECKLIST	4
SUGGESTED GROUP WORKSHOP	5
SAMPLE INVITATION TO WORKSHOP	6
CONDUCTING THE WORKSHOP	
"THE INVISIBLE MEETING" WELCOME & DISCUSSION	. 7
"RESPONDING TO THE CHALLENGE" EXERCISE & DISCUSSION	8
VIDEO PRESENTATION, EXERCISE & DISCUSSION	9-10
"ACTION PLAN" EXERCISE & DISCUSSION	11
CONCLUSION / SESSION EVALUATION	12
PARTICIPANT WORKSHEETS	
WORKSHEET #1: "CHALLENGES"	14
WORKSHEET #2: "RESPONDING TO THE CHALLENGE"	15
WORKSHEET #3: "THE INVISIBLE MEETING VIDEO"	16-17
WORKSHEET #4: "KEY TRAINING POINTS"	18
WORKSHEET #5: "ACTION PLAN"	19-20
WORKSHEET #6: "SESSION EVALUATION FORM"	21
GRAPHIC LAYOUT SECTION	
#1 "THE INVISIBLE MEETING"	23
#2 "VIRTUAL MEETINGS ARE BECOMING"	24
#3 "RUNNING AN EFFECTIVE TELECONFERENCE"	25
#4 "KEY TRAINING POINTS"	26
#5 "THE POINT OF A MEETING"	27
#6 "AT SOME UNIDENTIFIED MOMENT"	28

THE VIDEO'S MESSAGE

The point is that conference calls have to be taken every bit as seriously as face-to-face meetings.

- Stephen Matola

How productive was your last conference call? As more and more people begin to work from remote locations, the number of "over the phone" meetings is increasing dramatically. Unfortunately, many people have not yet learned the skills needed to make this type of meeting effective. We have all participated in ineffective conference calls, wasting everyone's time and energy. Often participants don't take a conference call as seriously as a regular meeting, but in reality, a conference call <u>is</u> a meeting—a "virtual meeting" with some very unique challenges.

"The Invisible Meeting" demonstrates 6 effective techniques for making your conference calls more productive. This engaging program demonstrates the "challenges" and the "virtual rules" that both participants and meeting organizers need to know. "The Invisible Meeting" will make your conference calls more effective, saving your organization time and money.

HOW TO USE THIS GUIDE

This program is suitable for group training as well as self study. Before beginning any training, take time to read through the entire guide. If you are planning a workshop, take special note of the **Preparing for the Workshop** section. The **Planning Considerations** and **Suggested Group Workshop** sections will help you determine your workshop agenda. All worksheets contained within the guide work for both groups and individuals. Instructions for both are given (as needed) at the beginning of each worksheet. This program may also be licensed for online training using video streaming.

You will also find a copy of this leader's guide in PDF format on the enclosed CD-ROM. The leader's guide contains all the participant worksheets. Also included on this CD-ROM is a separate PDF file with just the participant worksheets. Use this file to easily print out copies of the worksheets as needed.

The graphic layouts, located at the end of this guide may be presented in a number of ways:

■ Video projection ■ TV monitor ■ Overheads ■ Flip charts ■ Handouts

For example, you can use the DVD to present the graphics onto your monitor by selecting the "Graphics" button on the DVD's main menu. Another option is to use the PowerPoint file on the enclosed CD-ROM and display the graphics using your laptop attached to a video projector. The PowerPoint file may be edited as needed; for example, you could add your company's logo or other additional content specific to your organization.

Video Visions grants organizations that have purchased "The Invisible Meeting" training program the right to copy and edit the enclosed PowerPoint file and leader's guide worksheets for use with the "The Invisible Meeting" video. It is illegal to duplicate the video portion of this program in any format without written authorization from Video Visions.

KEY TRAINING POINTS

1. Challenge:	Virtual Rule:
COORDINATION ⇒	 CYBER COORDINATE Use scheduling software (when available) Consider time zones Provide agenda and necessary materials in advance Get confirmation
2. Challenge:	Virtual Rule:
DISTRACTIONS	MINIMIZE NOISE - Don't multitask - Find a place conducive to paying attention - Use your mute button - Keep meetings short and focused
3. Challenge:	Virtual Rule:
SURPRISE GUESTS	ANNOUNCE - ALWAYS - Announce everyone at the start of a meeting - Announce as people come and go
4. Challenge:	Virtual Rule:
MISSED BODY LANGUAGE	 GET VERBAL FEEDBACK Probe for responses from all participants Conduct a poll on major decisions Create an atmosphere where people are comfortable speaking up
5. Challenge:	Virtual Rule:
MISUNDERSTANDING	USE CLEAR LANGUAGE - Avoid jargon and idioms - Ask for clarification
6. Challenge:	Virtual Rule:
ISOLATION	 BE A TEAM Acknowledge accomplishments Take time for informal conversation Contact participants individually

TRAINING APPLICATIONS



This program is intended for training on <u>conference calls</u>, <u>virtual meetings</u>, <u>or virtual teams</u> and would benefit:

- Managers
- Supervisors
- Team leaders
- Team members

PLANNING CONSIDERATIONS

1. Know Your Audience

Understand the training needs of your audience and target your training accordingly.

2. Determine Objectives

Determine the objectives of your training session, considering your audience and their needs.

3. <u>View Video</u>

Watch the program. Note situations that relate directly to your audience.

4. Prepare Environment

Reserve a comfortable room with easy access for viewing the video and for small and large group discussions.

5. Prepare Materials

Use the Training Leader's Checklist to prepare PowerPoint slides and/or overheads and flip charts. Print or photocopy all participant worksheets.

6. Check All Presentation Equipment

Test all audio and visual equipment **well before** the training session begins. At the beginning of the session, make sure everyone can see and hear the presentation.

7. Send Out Invitations to Participants

A sample letter is provided for your use. (page 6)

TRAINING LEADER'S CHECKLIST

•	Reserve an appropriate location with:
	Comfortable seating Easy viewing of visuals
	Good lighting Adequate writing surface for participants
	Good acoustics — Accommodations for participants with disabilities
	Make sure all equipment is working by:
	Playing the video to make sure the player, monitor, and sound are functional
	Checking overhead projector, laptop computer and any additional equipment
	Organize and prepare all materials, including:
	Training Leader's Guide PowerPoint slides, overheads or flip charts
	Paper and pencils Worksheets photocopied for participants
	Any additional materials (list below):
	Any additional materials (list below):

SUGGESTED GROUP WORKSHOP



FOR: 2 ½ -HOUR GROUP TRAINING SESSION

Activity	Time	Page(s)
"The Invisible Meeting" Welcome & Discussion Worksheet #1: "Challenges"	30 minutes	7 14
"Responding to the Challenge" Exercise & Discussion Worksheet #2: "Responding to the Challenge"	20 minutes	8 15
Video Presentation, Exercise & Discussion Worksheet #3: "The Invisible Meeting Video" Worksheet #4: "Key Training Points"	45 minutes	9-10 16-17 18
Break	10 minutes	
"Action Plan" Exercise & Discussion Worksheet #5: "Action Plan"	30 minutes	11 19-20
Conclusion / Session Evaluation Worksheet # 5: "Session Evaluation Form"	15 minutes	12 21

(These times are approximate and may vary depending upon the size and responsiveness of your audience.)

SAMPLE INVITATION TO WORKSHOP



This letter can be sent to your participants before the training session. You can customize it to fit your needs.

(Date)

To: (Participant's Name) From: (Trainer's Name)

Re: "The Invisible Meeting"

The point is that conference calls have to be taken every bit as seriously as face-to-face meetings.

- Stephen Matola

You are invited to attend a workshop, entitled "The Invisible Meeting". This thought provoking video & training session prepare both meeting leaders and participants for a more effective "virtual meeting" or conference call. As conference calls are rapidly replacing face-to-face meetings, we need to understand their unique challenges and the ground rules for making them more productive, including:

Challenge: Coordination
 Challenge: Distractions
 Challenge: Invisible People
 Challenge: Missed Body Language
 Challenge: Misunderstanding
 Challenge: Isolation
 Virtual Rule: Cyber Coordinate
 Virtual Rule: Minimize Noise
 Virtual Rule: Get Verbal Feedback
 Virtual Rule: Use Clear Language
 Virtual Rule: Be A Team

Please mark your calendar for (insert date, time and place) so you can attend this important training session.

Thank you!

"THE INVISIBLE MEETING" WELCOME & DISCUSSION



Time Required: • 30 minutes

Materials Needed: • Graphic #1 (page 23)

• Worksheet #1: "Challenges" (page 14)

Reveal Graphic #1:

"The Invisible Meeting"

Welcome:

Introduce yourself and welcome participants. Ask participants to introduce themselves and describe how conference calls are used in their work situation.

Read or Paraphrase:

This is a workshop about creating effective conference calls, which *are* really meetings that need to be taken seriously. We know the benefits of these virtual meetings – we can work from anywhere, people don't have to travel, we can work with qualified people all over the world.... However, virtual meetings have unique challenges that are worth considering.

Hand Out Worksheet #1 and Read or Paraphrase:

Please take a few minutes to complete Worksheet #1: Challenges.

Small Group Discussion

After allowing time for participants to complete Worksheet #1, have them form groups of 3 or 4 to discuss their answers.

Large Group Discussion:

Ask participants to share some of the answers and situations listed on their worksheets. You may guide the discussion to include some of the 6 challenges illustrated in the upcoming video:

- 1. Coordination (get people in different time zones together)
- 2. Distractions (participants multitasking, noisy environments...)
- 3. Surprise Guests (someone may make a negative comment about a meeting participant he didn't realize was there)
- 4. Missed Body Language (50% of communication is non-verbal)
- 5. Misunderstanding (people of differing languages, cultures, areas of expertise may have more trouble understanding one another)
- 6. Isolation (remote locations, lack of informal conversations)

"RESPONDING TO THE CHALLENGE" EXERCISE & DISCUSSION



Time Required: • 20 minutes

Materials Needed: • Graphic #2 (page 24)

• Worksheet #2: "Responding to the Challenge" (page 15)

Reveal Graphic #2:

Virtual meetings are becoming more commonplace, but the old rules for running a meeting don't necessarily apply.

- cio.com

How can we take advantage of new technology to get work done across vast distances, without losing some of the valuable parts of face-to-face human collaboration?

- ravenwerks.com

Hand Out Worksheet #2 and Read or Paraphrase:

Now that we've identified some of the unique challenges of virtual meetings, let's consider practical ways to overcome those challenges. On this worksheet, you will be asked to find solutions to make your virtual meetings more productive. [You may have participants work individually on these worksheets or in small groups.]

Large Group Discussion:

Ask participants to discuss the challenges, ground rules and examples, which they feel are most useful and exemplary.

VIDEO PRESENTATION, EXERCISE & DISCUSSION



Time Required:

• 45 minutes: Video, Plus Discussion

Materials Needed:

- Video "The Invisible Meeting"
- Graphic #3 & #4 (page 25 -26)
- Worksheet #3: "The Invisible Meeting Video" (pp. 16-17)
- Worksheet #4 "Key Training Points" (page 18)

Reveal Graphic #3:

Running an effective teleconference requires new skills.

- cio.com

It's not just about connecting people via phone or video; it's about getting things done efficiently.

- computerworld.com

Video Introduction:

You may wish to introduce the video by saying, "The video we will be watching, 'The Invisible Meeting', dramatically illustrates the unique challenges of virtual meetings and the techniques for overcoming them to run a productive meeting. As you watch the video, please note those situations that relate to your own work experience."

Hand out Worksheet #3: "The Invisible Meeting Video" and Present the Video

Explain to participants that the questions on the worksheet will be discussed after viewing the video. They may wish to take notes as they watch. Present the video. After viewing, have participants discuss the following questions in small groups or in the large group.

Q: As Jon begins his first meeting, no one is there. What are some reasons participants give for missing the meeting?

A: (Suggested) Takashi couldn't figure out the right day of the meeting; Alana called the wrong number; Estefan didn't know he was part of the meeting; Mitch couldn't connect his laptop as a phone; and Darla didn't know what the meeting was about.

Q: When Jon says "Learn to cyber coordinate", what specifically does he suggest for effectively coordinating a conference call?

A: Use good scheduling software (if you have it) or send detailed emails and require confirmation; factor in time zones and times of day for everyone; provide an agenda and relevant documents in advance.

(cont'd)

VIDEO PRESENTATION, EXERCISE & DISCUSSION - cont'd

Q: <u>Distractions are a major problem in virtual meetings.</u> When Jon gives Virtual Rule #2 - Minimize Noise—what does he suggest to deal with distractions?

A: Don't multitask; find a place conducive to paying attention; use your mute button; and the team leader should keep the meetings short and focused.

Q: What example is used to illustrate why announcing participants is so important at the beginning of a meeting and as new people come in?

A: One of the team members, Mitch, makes negative comments about a company vice president who is listening, but wasn't announced.

Q: Jon says that half of all communication is non-verbal. So how does he suggest we make up for the absence of non-verbal cues in a virtual meeting?

A: The virtual rule is Get Verbal Feedback: probe for responses from all participants; conduct a poll on major decisions; and create an atmosphere where people are comfortable speaking up.

Q: The designer, Mitch, uses a lot of jargon when describing how he wants the packaging for their product. What "challenge" does this illustrate and what is the solution?

A: The problem is misunderstanding; only people in his field would understand him. The solution is to Use Clear Language: avoid jargon and idioms, and ask for clarification if you don't understand.

Q: <u>Isolation is a challenge for teams which meet only on conference calls.</u> What are a few solutions Jon offers to overcome the isolation?

A: Jon's suggestions for creating a feeling of a team are: allow time for informal conversation; acknowledge accomplishments; meet face-to-face when you can; contact people individually; and have team members talk to each other about specific issues that just involve them.

Q: Which of the issues presented in the video are most relevant to your organization? Explain.

A: Answers will vary.

Reveal Graphic #4 "Key Training Points"

Hand out Worksheet #4 - "Key Training Points"

Review the key training points. You may conclude the discussion by asking if there are any questions or comments about the training points or the video.

"ACTION PLAN" EXERCISE & DISCUSSION



Time Required:

• 30 minutes

Materials Needed:

• Graphic #5 (page 27)

• Worksheet #5: "Action Plan" (pages 19-20)

Reveal Graphic #5 and Read:

The point of a meeting is to bring people together. A virtual meeting only brings together their voices. To succeed, you have to make the extra effort to bring together everything else.

- "The Invisible Meeting" video

Hand Out Worksheet #5 and Explain:

Explain that this is the participants' opportunity to consider their own responsibility for making conference calls effective in their organizations. This exercise should also help them remember the points they found most useful in the video and workshop session.

Large Group Discussion:

After everyone has completed the worksheet, ask which actions might be the most difficult for them to maintain. Why?

CONCLUSION / SESSION EVALUATION



Time Required: • 15 minutes

Materials Needed: • Graphic #6 (page 28)

• Worksheet #6: "Session Evaluation Form" (page 21)

Reveal Graphic #6 and Read:

At some unidentified moment in the last year, conference calls replaced meetings, and answering machines replaced conversation. No sense complaining, it is now time to make the best of it.

- Peter Block, OnlyConferenceCalls.com

Hand Out Worksheet #6 and Conclusion:

Ask participants for any final questions or comments. Thank your group for their participation, hand out Session Evaluation Forms, and ask participants to complete them before leaving.

PARTICIPANT WORKSHEETS

(For use in group workshops or self study)

WORKSHEET #1: "CHALLENGES"

Virtual meetings come with a unique set of challenges.

It doesn't take much to bring a virtual meeting to a grinding halt.

- "The Invisible Meeting" video

Instructions:

For Group Workshops: Please answer the following 2 questions, which you will be discussing in a small group later.

For Self Study: Please answer the following 2 questions before you watch the video:

. List what you	have found to be the unique challenges of conference calls or "virtual meet-
	ic example from a conference call where one (or more) of the "challenges" egatively affected the meeting.

WORKSHEET #2: "RESPONDING TO THE CHALLENGE"

Virtual meetings are becoming more commonplace, but the old rules for running a meeting don't necessarily apply. Managers need to learn new skills to keep people engaged and to use the time (and technology) effectively.

- cio.com

How can we take advantage of new technology to get work done across vast distances, without losing some of the valuable parts of face-to-face human collaboration?

- ravenwerks.com

Instructions:

For Group Workshops: Working alone or in small groups, list 3 of the challenges from your Worksheet #1 (or from the large group discussion). For each challenge, come up with a solution to overcome the problem and provide an explanation or example. A sample has been done to clarify the instructions.

For Self Study: List 3 of the challenges from your Worksheet #1. For each challenge, come up with a solution to overcome the problem and provide an explanation or an example. A sample has been done to clarify the instructions.

Sample Challenge: Invisible Participants

Sample Solution: Announce all participants, at the beginning of the meeting and as new people enter.

<u>Sample Explanation/Example:</u> In a project team meeting, it would be essential to identify any customer present at the meeting, so no one says anything he or she would not want the customer to hear. In a face-to-face meeting, this obviously would not be an issue.

hallenge #1:
olution #1:
xplanation/Example:
hallenge #2:
olution #2:
xplanation/Example:
hallenge #3:
olution #3:
xplanation/Example:

WORKSHEET #3: "THE INVISIBLE MEETING" VIDEO

Instructions:

For Group Workshops: After watching the video "The Invisible Meeting" answer the following questions—the workshop leader will have you discuss these questions in small groups or in the large group.

For Self Study: After watching the video "The Invisible Meeting" answer the following questions.

A:
Q: When Jon says "Learn to cyber coordinate," what specifically does he suggest for effectively coordinating a virtual meeting?
A:
Q: Distractions are a major problem in virtual meetings. When Jon gives Virtual Rule # - Minimize Noise – what does he suggest to deal with distractions? A:
Q: What example is used to illustrate why announcing participants is so important at the beginning of a meeting and as new people come in?
A:

WORKSHEET #3: "THE INVISIBLE MEETING" VIDEO - cont'd

A:	
	tch, uses a lot of jargon when describing how he wants the packaging at "challenge" does this illustrate and what is the solution?
A :	
	llenge for teams which meet only on conference calls. What are a ers to overcome the isolation?
few solutions Jon offe	
few solutions Jon offe	
few solutions Jon offe	
few solutions Jon offe A:	ers to overcome the isolation?
A:Q: Which of the issu	
A: Q: Which of the issue Explain.	ers to overcome the isolation?
A:	ers to overcome the isolation?

WORKSHEET #4: "KEY TRAINING POINTS"

The following are for your review only, as a reminder of the video's training points.

CHALLENGE	VIRTUAL RULE
1. Coordination ⇒	Cyber Coordinate
1. Coordination 4	 Use scheduling software (when available) Consider time zones Provide an agenda and necessary materials
	in advance - Get confirmation
2. Distractions ⇒	Minimize Noise
	 Don't multitask Find a place conducive to paying attention Use your mute button Keep meetings short and focused
3. Surprise Guests ⇒	Announce – Always
	 Announce everyone at the start of a meeting Announce as people come and go
4. Missed Body Language ⇒	Get Verbal Feedback
	 Probe for responses from all participants Conduct a poll on major decisions Create an atmosphere where people are comfortable speaking up
5. Misunderstanding ⇒	Use Clear Language
	Avoid jargon and idiomsAsk for clarification
6. <u>Isolation</u> ⇒	Be a Team
	Acknowledge accomplishmentsTake time for informal conversationContact participants individually

WORKSHEET #5: "ACTION PLAN"

I want to remember and use...

List 3 things from your conference c	the video and/or workshop that you would like to remember and implement in alls:
1.	
3	
When will you ha	ve an opportunity to implement these actions?
What obstacles, if those obstacles?	any, may prevent you from taking the above actions? How can you overcome
	(cont'd)

WORKSHEET #5: "ACTION PLAN" - cont'd

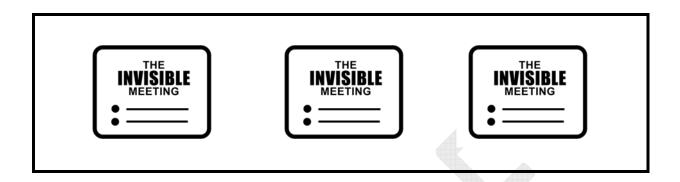
What changes in your conference calls can you predict (if any) as a result of these actions?
One month later
What changes have you implemented in your conference calls?
What has been the benefit of these changes?
What further actions do you plan to take to make your conference calls even more effective?

WORKSHEET #6: "SESSION EVALUATION FORM"

Instructions:

Please circle the number that best describes your evaluation of the training session:

	Strongly Agree	Agree	Uncertain	Disagree	Strongly Disagree
This program clearly demonstrated the unique challenges in a virtual meeting.	5	4	3	2	1
This program clearly demonstrated the techniques for improving the effectiveness of virtual meetings.	5	4	3	2	1
This program provided practical information I can use in my work situation	5	4	3	2	1
The best part of the program	was:				
The program could be improve	ved by:				
Additional comments:					



The following pages contain graphics that can be accessed and displayed in the following ways:

■ Video projection ■ TV monitor ■ Overheads ■ Flip charts ■ Handouts

Also, these graphics can be found within a PowerPoint file on the enclosed CD-ROM . Another option is to call up similar versions of these graphics using the DVD. Look for the "Graphics" button located on the main menu screen of the DVD. You will be able to display the graphics directly to your monitor before or after playing the video.

THE ONUS OF THE MEETING

Virtual meetings are becoming more commonplace, but the old rules for running a meeting don't necessarily apply.

- cio.com

How can we take advantage of new technology to get work done across vast distances, without losing some of the valuable parts of face-to-face human collaboration?

- ravenwerks.com

Running an effective teleconference requires new skills.

- cio.com

It's not just about connecting people via phone or video; it's about getting things done efficiently.

- computerworld.com

KEY TRAINING POINTS

CHALLENGE		VIRTUAL RULE
1. Coordination	⇨	Cyber Coordinate
		 Use scheduling software (when available) Consider time zones Provide an agenda and necessary materials in advance Get confirmation
2. <u>Distractions</u>	⇒	Minimize Noise
		 Don't multitask Find a place conducive to paying attention Use your mute button Keep meetings short and focused
3. Surprise Guests	⇔	Announce – Always
		 Announce everyone at the start of a meeting Announce as people come and go
4. <u>Missed Body Language</u> ⇒ Get Verbal Feedback		
		 Probe for responses from all participants Conduct a poll on major decisions Create an atmosphere where people are comfortable speaking up
5. Misunderstanding	\Rightarrow	Use Clear Language
		Avoid jargon and idiomsAsk for clarification
6. <u>Isolation</u> ⇒		Be a Team
		Acknowledge accomplishmentsTake time for informal conversationContact participants individually

The point of a meeting is to bring people together. A virtual meeting only brings together their voices. To succeed, you have to make the extra effort to bring together everything else.

- "The Invisible Meeting" video

At some unidentified time in the last year, conference calls replaced meetings, and answering machines replaced conversation. No sense complaining, it is now time to make the best of it.

- Peter Block, OnlyConferenceCalls.com

For more information...

...about Performance Resources' award-winning videos and other training products, or for pricing information on this product, please call **1-800-263-3399** or visit us at **www.owenstewart.com**.



OWEN-STEWART PERFORMANCE RESOURCES INC.

163 North Port Road, Port Perry, ON L9L 1B2
Toll Free: 1-800-263-3399 • Fax: (905) 985-6100
E-mail: sales@owenstewart.com • Website: www.owenstewart.com