

Running Effective Remote Work Meetings

Virtual meetings have become the primary way remote professionals connect with clients and colleagues—but not all virtual meetings are created equal. This course dives deep into the skills and strategies needed to make remote meetings more focused, engaging, and productive. Drawing on extensive expert insight, you'll learn how to prepare effectively, facilitate meaningful discussions, and follow up in ways that keep everyone aligned. A must for any accounting or tax professional managing client relationships remotely.

CREDIT HOURS 2 | FIELD OF STUDY BUSINESS | EXAM QUESTIONS 10

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LEARNING ASSIGNMENTS AND OBJECTIVES

Assignment

- Study the full course materials included here.
- Complete the review questions after each chapter.
- Answer 10 final exam questions.
- Final exam is scored immediately, 70% or better passes.
- Certificate of completion is available in your account.
- Failed exams can be retaken free of charge.

Course Objectives

- Recall what qualifies as proper etiquette for virtual meetings.

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Chapter 1: CLIENT AND TEAM MEETINGS: MAKING THE MOST OF IT

Chapter Objective

After completing this chapter, you should be able to:

- Recall what qualifies as proper etiquette for virtual meetings.

We have discussed many ways virtual meetings can be exhausting. Zoom fatigue is a real phenomenon, and too many remote meetings can kill *productivity*. Some meetings need to happen to get people on the same page, but arguably, many times that can be done with other, more asymmetric methods such as a voicemail, email, or a note pinned on a virtual project board. But there are some meetings that are still necessary, and meetings are not inherently a bad thing. In fact, a good meeting can be invigorating. There is a human comfort factor involved. A good meeting makes people feel that everyone is on the same page. The official meeting, in many cases, acts as an affirmation of the team's or client's feelings that everything is on track.

As has been observed, virtual meetings lose elements that are only found in face-to-face meetings. It can take several remote communications to get across the same level of understanding you would get in a single in-person meeting. One reason is that in-person meetings and virtual meetings require different skill sets to achieve the same results. Real-world methods don't always translate well in the virtual world.

Being brought up in a multilingual household, I learned early on that many idioms and idiosyncrasies do not translate from one culture to the other. I found this to be true when working with developers in other countries. I adjust my speech and written communications to take out phrases that might be common to me but may be confusing to others. I am more deliberate in the way I use language as a tool. Think about the difference between a machete and a scalpel. Both instruments can be very useful for their own purpose, but you would not use them interchangeably. The same concept applies to real-world skill sets and virtual-world skill sets when it comes to meetings and getting your point across. One requires much more precision in how you use your tools and requires closer observation if you are to have the same level of success. In this chapter we discuss how to make the most of your virtual meetings with your team, clients, and others outside of your organizations.

A QUICK CASE FOR VIRTUAL MEETINGS

Prior to the COVID-19 pandemic, videoconferencing was used but not to the same degree that businesses had to when most employees started working remotely. Many small businesses did not initially use video to conduct business but quickly learned to do so. When your company switches to a remote work situation, it may be due to a temporary need. But I would encourage you to make video meetings a default setting for your company.

As many businesses have noted, there have been some unexpected and helpful operational advancements from the abrupt shift to working remotely. Some companies such as Raybourn Group International already had remote workers on their team, and those employees were likely to never be in the office. However, that meant that the team would never have an opportunity to meet each other in person, which may have seemed unusual to some. Prior to the 2020 shutdowns, video was not the norm for team meetings that included remote members. Here is some insight from Leslie Murphy, CEO of the Raybourn Group:

Sometimes if we had a team meeting, people would meet in the conference room and then they would audio in the person who was remote. We're not going to do that anymore, because we found that when we're all on the same level playing field, people engage much better.

In other words, instead of having a remote worker phone in, they will be using video as part of their team meetings from now on. They have also decided to leverage video meetings for other operations of the company including new hires, as Leslie indicates:

We utilized Zoom for all interviews and advertised we were doing that to help people feel comfortable about the process. We will always utilize Zoom or Teams in the future, at least for first interviews. The benefit was that we were able to engage more of our remote and non-Indianapolis-based staff, which was very beneficial to the process.

Clearly, for hybrid teams that work in office and remotely, sticking to a video format keeps everyone feeling engaged and on the same level. But it has to be done the right way. Having everyone who is in the office sit around the conference table while the remote workers log in from their various locations isn't optimal. That only amplifies the feeling of being disconnected. It projects the idea of two teams, those on the inside and those on the outside looking in. Instead, everyone should be in their respective spots joining in from their workstations.

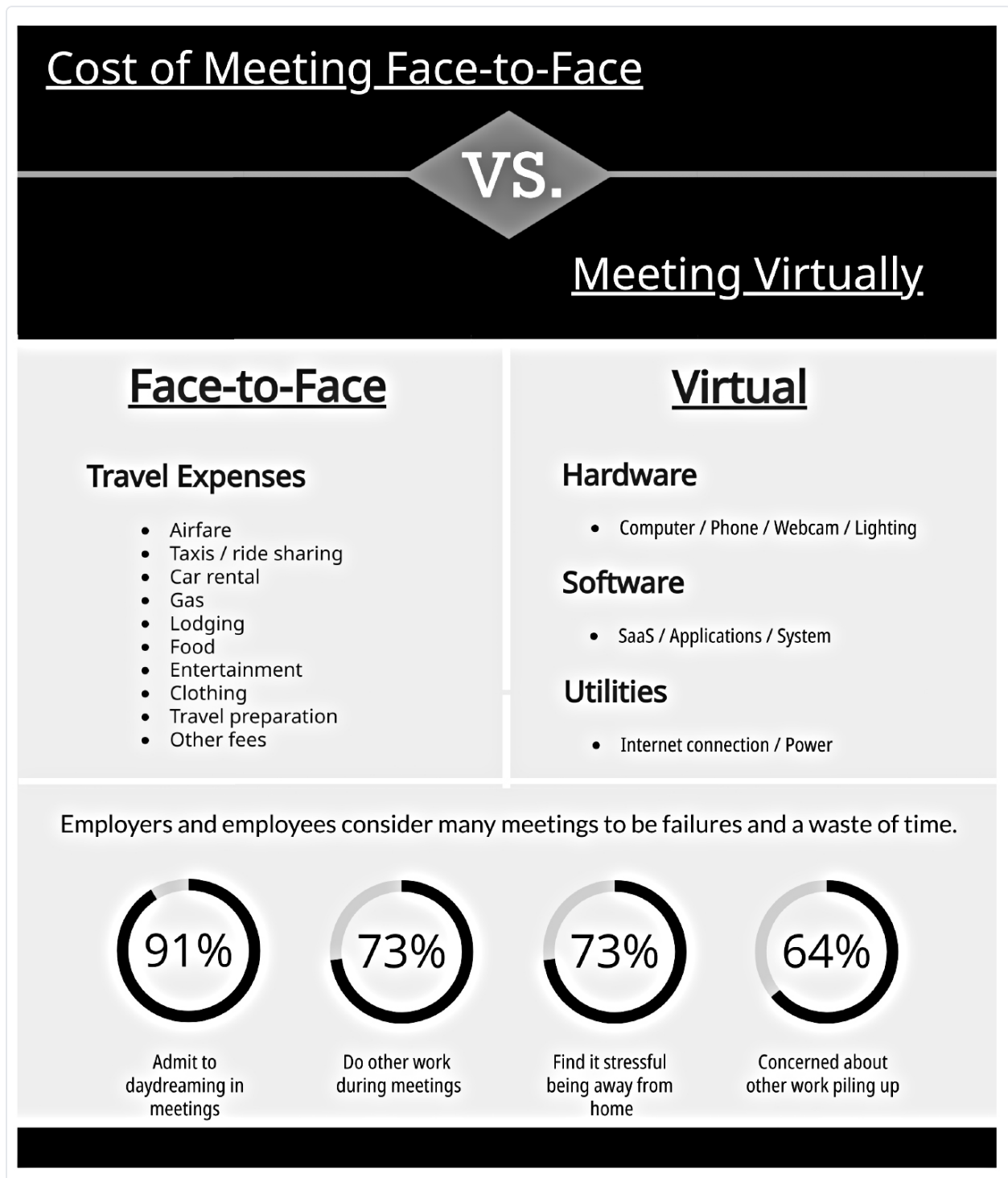
I Stopped in 2014

Now that video meetings are part of everyday culture, you should also reconsider your need for face-to-face client meetings. Video meetings are now the norm for every level of business, so virtual client meetings are no longer unusual but are widely accepted.

In 2014, I made my last business trip to meet with clients. I found myself being much more stressed when I was traveling for business than when I was working from home or my office. When I am on the road, I always felt as if there was work that I was missing or couldn't get done while I was in the airport, on the plane, or being taxied to the hotels. Some of that was built up in my mind, and those feelings were exaggerated by the fact that I would much rather be nearer to my family and pets and the comforts of home. I am certainly not the only person who feels this way. There are countless articles on the subject of reducing stress while on business trips.

Then, of course, there is the expense of business travel. Figure 7.1 shows data from a Verizon Business report on the financial and stress-related impacts of business travel for in-person meetings. This data shows that companies should consider whether traveling to meet with clients in person is that much more advantageous and worth the expense. There are those who still argue that nothing beats the face- to-face meeting.

FIGURE 7.1: COST OF MEETING FACE-TO-FACE



The Personal Relationship

It is ironic that, when I chose to stop traveling to work, a friend of mine wrote a blog on the merits of in-person business meetings that got a good deal of media attention. In-person meetings with clients are still a good idea, but they should not be your default setting. One major benefit of in-person meetings with clients is building personal relationships. I fully agree that much of business is built on relationships, but we can build extraordinary relationships with people even if we never meet face-to-face. The proof of that came during the pandemic.

My company works very closely with our clients. We are a B2B company that helps with our clients' digital marketing and customer engagement. We get to know not only our customers' brands very well, but the individuals behind the brand. During the shutdown, we received calls from very emotional clients. They opened up to us about what the shutdown was doing to their business, including their *fears* that they would need to lay people off or even shutter their business for good. They were afraid not only for their employees' future, but the future of their own families and themselves. Some even openly wept with us on the phone.

We are close with our customers—close enough that they feel comfortable being open and vulnerable with us. They feel that they know us as people well enough to be able to tell us that they are afraid of what is happening to them as individuals as well as business owners. And yet, we have never met them in person.

Virtual client meetings can be just as effective as in-person client meetings. You can still use remote technologies to build great client relationships and relationships with co-workers. One of the keys to this is to always be authentic. Be true to your values and your company mission, and don't be afraid to show your human side. And remember, virtual meetings require separate skill sets from those needed for in-person presentations.

BEFORE YOU START

Hopefully you would never simply go on stage in front of a crowded room to give a presentation without being fully prepared for it. Even if you are fluent in your subject matter, you wouldn't want to just wing it. You would want to have your facts and figures ready, and you would want to know what aspects of the topic you will cover and how they are related. You would prepare any images that emphasize your points and you would want to be sure you were up-to-date on your information so that you can respond intelligently should anyone from the audience ask any questions. These line items on the preparation task list cover the presentation information, but there are other important tasks you want to check off prior to walking onto that stage.

Consider for a moment the place where you are speaking. The stage has to be set, the lighting needs to be in place so that people can see you well, and the audio needs to be checked to be sure that the microphone works and the speakers emit a clean sound so that you can be heard as well as understood. Your images will need to be projected with equipment or printed so that you can share

them with the audience. You need to prepare yourself as well. You should be showered and well-groomed. You will want to choose appropriate professional clothing that projects your expertise and authority on your subject. Then you also need to prepare yourself mentally. If you just had an argument with a spouse or loved one before the meeting, you need to push those issues and emotions out of your head for a while. You need to center your mind and find clarity so that you won't be distracted by outside influences.

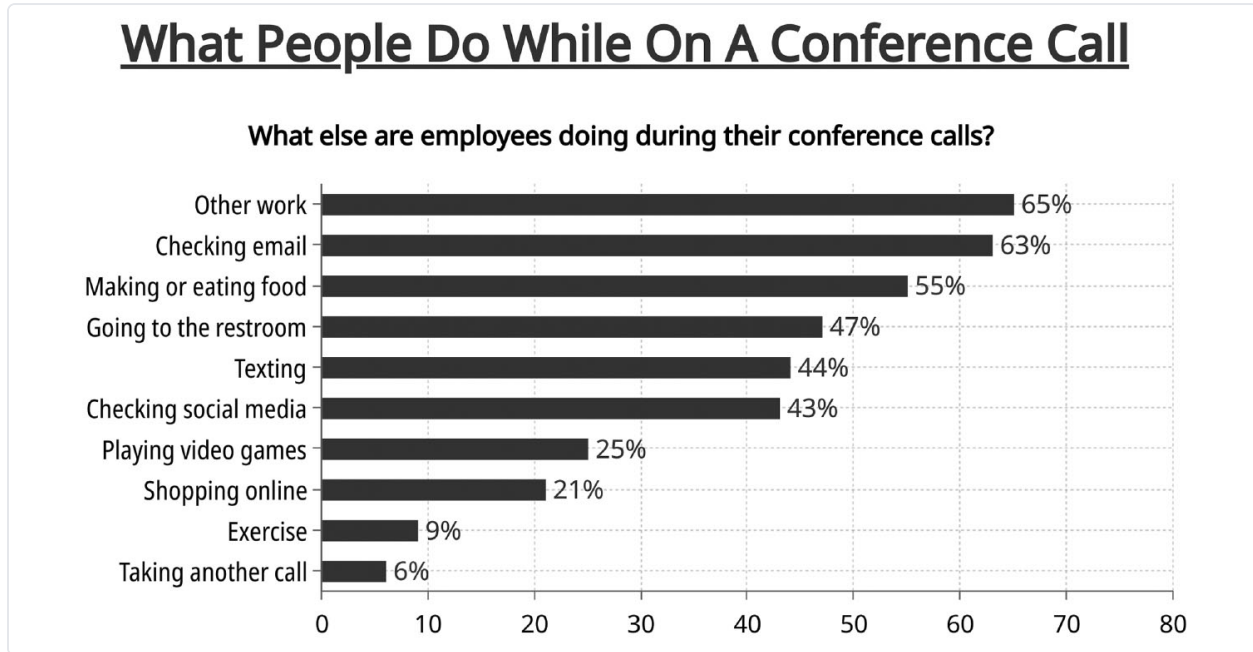
These are some of the steps you would need to take if you were to have a successful on-stage presentation, and you should keep them in mind to help make your video meetings successful as well. Virtual meetings have become so commonplace that many times people do not take the time to set the virtual stage or prepare the other aspects of the meeting that one would have done in a more formal setting. Here, we discuss some of the basics that you should consider in order to have a highly successful virtual meeting where people feel engaged and you maintain their attention on the topic.

Keep Them Engaged by Design

One important topic that many business news websites discussed during the shutdown was how easily distracted people were on video meetings. This speaks to the high rate of fatigue people were experiencing on video meetings. Many speculated that it was related to the pandemic. Others considered whether *millennials* and Gen Z had shorter attention spans than Gen X or baby boomers. Still others attributed it to the large number of video meetings overall. But being distracted during meetings is nothing new, and it's certainly not limited to video meetings.

Figure 7.2 and Figure 7.3 illustrate distractibility during virtual meetings. The first is from a 2014 *Harvard Business Review* article titled "What People Are Really Doing When They're on a Conference Call." The second graph is taken from a June 2020 report from online career and job website Zippia entitled "Most People Are Distracted During Virtual Meetings." The first of these articles focuses on phone calls, and the second focuses on video meetings. These sets of data were strikingly similar despite the six years between articles and the different technologies being utilized. Video calls were not commonly used in 2014; most companies used speaker phones in conference rooms for their conference calls.

FIGURE 7.2: WHAT PEOPLE DO WHILE ON A CONFERENCE CALL



In 2014, there was no great upheaval in the business world as there was in 2020, yet people were still just as distracted during remote meetings. It is unlikely that people were widely reported to be so distracted in meetings during the pandemic simply because of the large number of video meetings. In 2014, there were generally far fewer meetings than in 2020 because many additional meetings had to take place to get everyone on the same page while teams were widely distributed during work-from-home periods.

So, the problem of people not being engaged in their remote meetings is not the type of technology. There may have been fewer meetings in 2014, but there was still a high level of distracted people who were not fully engaged in those remote meetings. The issue does not seem to simply be the number of meetings taking place, and it's not a sudden upheaval in the business world or the world in general. So what's the reason? It is the way remote meetings are being conducted by the overwhelming majority of people in business.