

Virtual Meetings – Best Practice Ways of Working v2.0

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Introduction

This paper aims to capture and share best practice for holding Virtual Meetings, both across and within organisations. The original aim was that it would be produced at the end of the [Skype for Business Project](#), but with the current scenario created by Covid-19 and the requirement for many staff to work remotely, it is obvious we need to provide this guidance now. As a result, this paper has been produced quickly and will be updated iteratively as new information is identified. Although informed by the work on Skype for Business, the guidance is intended to be solution agnostic.

Version 2.0 of this document, incorporating feedback received after the initial release was issued on the 9th April 2020.

Scope

The scope of the paper is:

- Types of Virtual Meeting
- Virtual Meeting Roles
 - Chair
 - Secretary
 - Presenters
 - Participants
- Meeting Setup
- Meeting Practices – Generic
- Meeting Practices – Workshop
- Meeting Practices – Conference
- Post Meeting

Types of Virtual Meeting

The guidance will change depending upon the type of meeting, so the first step is to determine the purpose and participants of the meeting as this will inform the structure. There are 4 types of virtual meeting considered in this paper:

- Ad-hoc voice/video - All participants are considered as potential presenters and may require a Chairman and/or Secretary to manage the meeting and any post-meeting activity - this can be

agreed amongst participants at the start. Typical uses are as a small discussion group around one topic.

- Ad-hoc Online Chat - All participants are considered as delegates as typically there is no voice or video sharing. Common uses of ad-hoc online chat are as forum to exchange ideas and make arrangements for more in depth meeting sessions. Where documents are the subject of online chat, it may be that such a meeting may involve ad-hoc screen share. Guidelines for the safe sharing of material referred to elsewhere in this document should be applied where appropriate.
- Scheduled Workshop/Meeting, requires a Chair, Presenters (this may be only the Chair), Secretary and participants. Typical uses are status updates, collaborative working, brainstorming or working together on some type of deliverable.
- Conference/Briefing, requires a Chair, Presenters (this may be only the Chair), Secretary and participants. Typical uses are training, status updates and information sharing where there is limited discussion.

The meeting duration should also be considered, typically virtual meetings should be no longer than 90 minutes to maintain concentration from all participants and avoid distraction by competing tasks. If there is more content than will fit into a 90 minute window, turn the meeting into a number of separate sessions with timed breaks.

Virtual Meeting Roles

In a virtual meeting it's even more important to be clear that every participant understands their role. It's important that all the roles described below are filled. It can be tempting for one person to try to act as chairman, presenter and secretary. Often this makes it difficult to do all the roles well, for example not noticing a chat question whilst presenting. It is good practice to share these roles out across the participants.

Chair

The Chair of the meeting is the facilitator and s/he should:

- Set up the meeting whether solo or, by clear agreement, in conjunction with the Secretary. Depending on the meeting software being used and how the meeting is to be run, it can be important who acts as the meeting host and uses the meeting tool to set the meeting up. If the meeting is being set up by someone that is not participating in the meeting, make sure all the information required to start the meeting is available.
- Open the meeting, check participants' audio (video) is working and brief all participants on the meeting objectives, any security restrictions concerning the meeting content and the behaviours expected of participants (i.e. muting microphones when not speaking, when and how to ask questions).

- Facilitate the meeting, starting with taking 'register' of who is on the audio/video conference combined with participants identifying themselves and ensuring that they are authorised delegates; managing questions, monitoring presenters and participants to ensure compliance with guidance.
- Gain consent from meeting attendees if the meeting is to be recorded, either for onward transmission or for the purpose of creating a transcript. If the meeting is to be held under Chatham House Rules, remind participants what this means.ⁱ
- A virtual meeting can be more demanding than a face-to-face meeting as there is no body language or other non-verbal clues in the case of an audio conference and more limited cues for a video conference; therefore the Chair's role has increased importance to ensure that the meeting stays on track and remains focused on the task/purpose.
- If the meeting is interactive ensure all participants have the opportunity to contribute. The Chair could encourage this by asking participants to contribute via the Chat facility that could be monitored by the Secretary.

Secretary

The Secretary of the meeting should:

- Assist the Chair in setting up the session (avoiding any ambiguity about who does what) and monitoring involvement of participants – e.g. taking the Register, reviewing contributions on Chat.
- Send out invitations to target groups/individuals, with clear joining instructions, aims/objectives &/or an Agenda (using the TD-Info website functionality); arrange additional publicity if appropriate (e.g. website News Item, social media (picked up from the News Items); monitor responses to invitations ahead of the session and re-send where necessary. The invitations/publicity may also include pre-reading material or link to survey, benefits of participation, timings, encouragement to join 5 mins ahead of the session start to enable a prompt start, security policies etc.
- Compile meeting notes and actions from the meeting that are published soon afterwards using the website &/or a follow-up email to the invited groups/individuals.

Presenter

All presenters are responsible for:

- Ensuring that their material meets the security requirements set by the Chair.
- Managing the background on a video call and any surrounding audio does not give rise to security issues; also, the content on laptop/desktop that is being shared must have visible only information (suitably labelled with security status) that is appropriate to the meeting and must

not compromise security in any way. Consider using a second screen for presented content to help control what is shared with meeting participants.

- Ensuring that any information displayed is authorised for sharing as, while it may be possible to disable recording directly, there is no way of stopping participants taking photos or video/screen shots of shared screens.

Participants

Participant are responsible for:

- Ensuring that they comply with the security requirements set by the Chair.
- Not forwarding the invitation to others unless it says specifically in the meeting calling notice that they may do so.
- Responding to invitations in a timely manner; ensuring you logon to the session in advance of the stated start time to avoid delays and ensure readiness for a prompt start by all; identifying yourself clearly to the virtual meeting – name and company minimum.
- Check well ahead of the meeting that you can use the meeting tool(s) proposed if they are not ones which you use regularly. Also determine how you are going to join the meeting, for example are you going to use an integrated audio function on your computer or use a phone. Integrated audio or using the meeting tool to dial you often makes it easier for others to identify and monitor participants but may also have cost and/or network bandwidth implications.
- Muting your microphone when not in use to limit background noise. And unmuting ahead of speaking of course!
- Informing the Secretary &/or Chair if there are audio/visual issues (e.g. audio too quiet or distorted or non-existent) whether via the Chat facility or by speaking out.
- Avoid multitasking, participants should give the virtual meeting their undivided attention. Minimise the use of IM during calls as it is not viewable by all participants and can be distracting.

Meeting Setup

When planning a meeting it is important that Chair & Secretary agree:

- The content and wording of the meeting invitation. Ensure that the invitation includes appropriate classification level and handling instructions.
- If the meeting is to be online only or if a dial-in option should be offered.
- The software to be utilised, the features that will be used and any limitations.
- The security practices for the meeting:

- How participants may join the meeting, i.e. VPN, work base email domain logins, private secure WIFI only etc. Also consider if the device type or network people may use to join the meeting has any bearing on the attendees or content eg Corporate issued devices, BYOD, UK based network services etc.
- Any security classification, i.e. OFFICIAL-SENSITIVE and the appropriate restrictions.
- Limitations on participation from public spaces or communal areas where the meeting could be overheard.
- A clear agenda with timings, what is (and isn't) to be discussed, what the desired outcomes will be, add breaks as appropriate
- Whether to split a longer meeting into smaller chunks and stick to timings so participants only need to join for the elements they are interested in.
- The list of invitees.
- If a virtual lobby is available and required, how it will be used – for instance, add a standby slide so participants know they are in the right place.
- Who can present?
- Whether the meeting will use video, audio, screen sharing etc. It may be advisable to ask participants to turn off video to preserve bandwidth and limit connection quality issues.
- What pre-reading material is made available and where to access it – e.g. link(s) on the website to download. Some meetings can work well if the participants are guided through documents that they have previously downloaded
- If video is being used, consider the venue and background needs to ensure classified/protected information is not displayed
- How will comments or questions from participants be handled? If the meeting software to be used incorporates a 'raised hand' function or a chat facility, they may be monitored by the meeting secretary to introduce the question or comment at an appropriate point. Where the software being used doesn't support a raised hand approach or chat facility, consider asking invitees to submit questions ahead of the meeting based up the pre-circulated meeting material and incorporate a suitable break in the meeting to address any ad-hoc questions arising. Care should be taken to ensure that inviting questions during the meeting doesn't become a free for all as participants come off mute. One suggested method is to agree with the attendees at the meeting outset that when questions are invited, they should say 'Question from X', so that this can be noted by the secretary and then each questioner invited to speak in turn.

- Can additional functionality be used to engage participants, e.g. whiteboard, online polling or annotation? Bear in mind that different policies across participating organisations may preclude use of some functionality, meaning that a ‘lowest common denominator’ approach may be the most effective.
- Is the use of additional tools appropriate? For instance, live tweeting may be useful in sessions with large numbers of participants.

Meeting Practices – Generic

- Determine who is going to open the meeting early to avoid last minute technical hitches, and greet attendees as they join in preparation for the meeting to start on time
- The Chair/Secretary should monitor the meeting to ensure that only authorised personnel are attending. In the first instance, this can often be usefully combined with a round of introductions at the beginning of the meeting that will familiarise participants with the voices of others.
- Protecting the privacy of any customer or colleague details is paramount. The Chair/Secretary should agree with the meeting participants if contact details can be shared with the group. This intention to share contact details may be stated within the original invite if appropriate.
- The Chair should look to suggest that they will pause regularly between agenda items/ before progressing to the next slide for comment and will keep going unless someone interjects.
- All attendees need to consider who can overhear them; best practice is a headset including a microphone, which is muted when not in use as far as practicable.
- All attendees should ensure that there are no smart devices in the vicinity (TVs, phones, smart home speakers, Amazon Echo etc) that may compromise security.
- All participants should mute their device microphones when not in use and mute Outlook message notifications to reduce background noise.
- Where possible and assuming circumstances enable the full use of available bandwidth, provide a visual focus through a presentation, desktop sharing, or video.
- Where material is being shared, the Chair/Secretary should seek confirmation of the approval - if company proprietary or export – and that approval has been granted. All participants must be aware of any regulations or restrictions pertaining to their geography.
- If screen sharing, establish in the introductions that participants can view the screen being shared. For dial-in participants, share the documentation ahead of the meeting.

- To avoid sharing content from your screen that's not relevant to the meeting, good practice is to ensure that before joining the meeting all applications / documents not relevant to the call are closed, or at least particularly sensitive ones are.

Meeting Practices – Workshop

A workshop by its very nature will be interactive and this potentially makes it more challenging to facilitate.

- All participants need to be aware that they should not talk over one another, which means that there will need to be positive action from the Chair to ensure that they elicit the opinion of all attendees.
- Meeting participants to mute their microphones unless talking, to reduce background noise
- Additional software tools may be required, e.g. a Whiteboard App, but the Chair and Secretary must endeavour to ensure that they are authorised by the participants' organisations.

Meeting Practices – Conference

In addition to the generic requirement an online Conference will need to consider:

- The size of the audience, and how any restrictions with authorised attendance will be enacted.
- The configuration of the meeting tool to manage who can speak and when rather than an open session for all.
- How and when questions will be asked?
- Who can see the list of participants?
- Whether a rehearsal with presenters and their material will reduce the chances of technical problems on the day and/or issues with any content which is being shared.

Post-Meeting

- Consider conducting a post meeting evaluation. In order to facilitate a learning environment for all, it may be useful to reflect on performance, what worked and what might have gone better
- What will be published and where? Where necessary, ensure you have written permissions to cover publication of content (e.g. a slide deck) and the scope of its release (e.g. TD-Info member-only or for Public access); For information, TD-Info
- The meeting notes and actions to be produced in a timely fashion and issued to the participants and any 'appropriate' others.
- If further meetings on the topic are to be arranged, it is good practice for the Secretary to contact in advance of the next meeting those who had actions placed upon them from previous

sessions. This friendly prompt say a week ahead of the next meeting, can be a reminder of any apparent outstanding actions and their current status.

References and Additional Reading

The National Cyber Security Centre (NCSC) publish guidance for video conference services. Following the dramatic increase of utilisation of tools such as Teams, Zoom and Go to Meeting, NCSC have published advice for organisations grappling with security issues. Read the guidance [here](#).

ⁱ Chatham House Rules state *“When a meeting, or part thereof, is held under the Chatham House Rule, participants are free to use the information received, but neither the identity nor the affiliation of the speaker(s), nor that of any other participant, may be revealed.”* Source: <https://www.chathamhouse.org/chatham-house-rule#>