

Effective Virtual Meetings & Basics for Using the Skype for Business Tool

ENSA

Updated June 2018 ESO



Objective & Agenda

- Objective:
 - Share Tips and Techniques for Holding Effective Virtual Meetings using Skype
 - Practice Using Skype for Business (Optional)
- Agenda:
 - Benefits of Virtual Meetings
 - Remote Technology and Skype Meeting Basics
 - Techniques for Meeting Participants and Meeting Leaders
 - Foundation for Effective Meetings
 - Resources (Appendix)
- *Introductions*



The Benefits of Virtual Meetings

- Includes everyone even when they cannot all be in the room together
 - Ability to continue to conduct meetings even during disruptions due to weather, construction, etc.
 - Can gather a group on shorter notice
 - Technology allows participants to see the screen and share theirs
-
- *What other benefits do you see?*



Tools for Effective Virtual Meetings

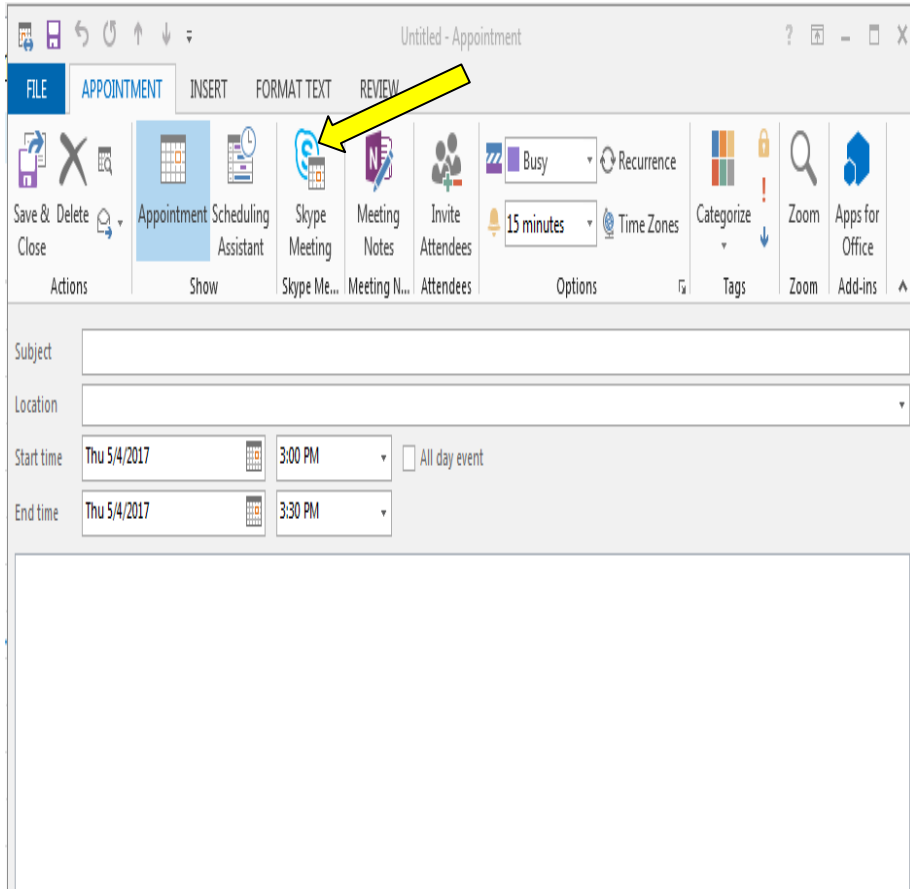
→ [Join Skype Meeting](#)

This is an online meeting for Skype for Business, the professional meetings and communications app formerly known as Lync.

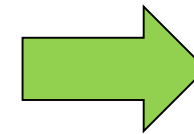
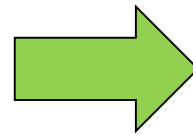
- Skype
 - Initiating Skype for Business
 - Adding the Skype link to a meeting invitation
 - Joining the meeting
 - Skype invitation through Lync
 - Features
 - Audio, Video, options for calling in
 - Screen Sharing
 - Messaging
- Other tools exist such as GoToMeeting, WebEx, Citrix
- *What tools have you used, and has it been a favorable experience?*

Skype Meeting via Outlook--Create a Meeting

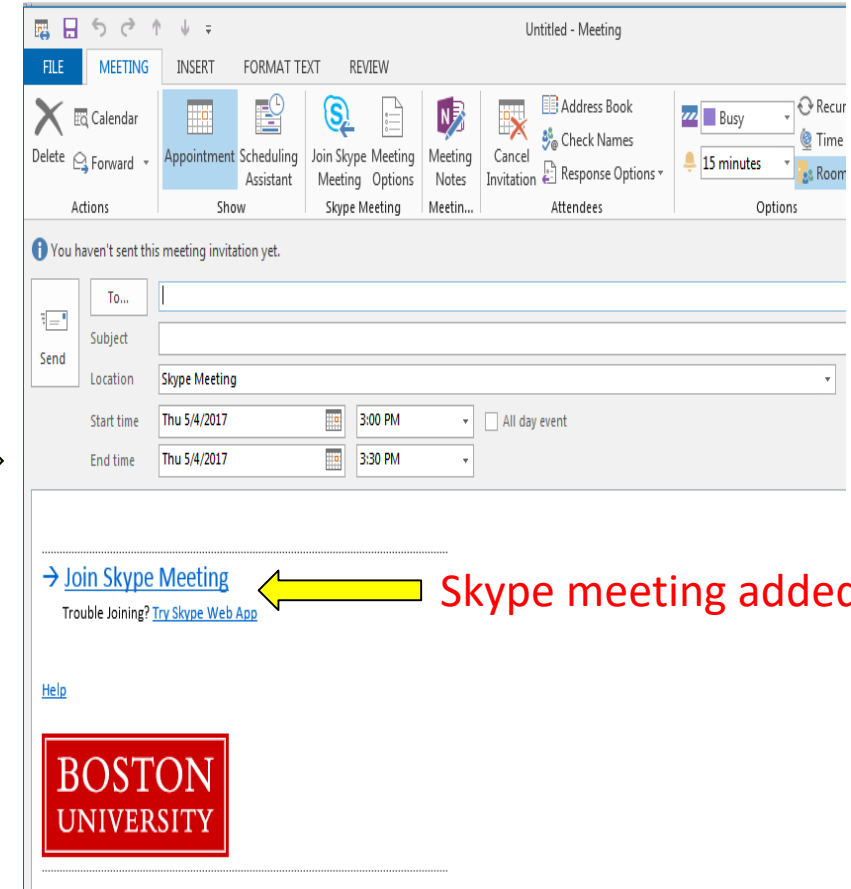
Open a new meeting from Outlook Calendar



Click Skype Meeting



Continue to set up meeting as usual



Skype meeting added

Invitation with Bridge Line Included

A Bridge Line provides an alternative call in number for participants.

Untitled - Meeting

FILE MEETING INSERT FORMAT TEXT REVIEW

Calendar Appointment Scheduling Assistant Join Skype Meeting Options Meeting Notes Cancel Invitation Address Book Check Names Response Options

Actions Show Skype Meeting Meeting... Attendees Options

You haven't sent this meeting invitation yet.

To...

Subject

Location Skype Meeting

Start time Wed 7/26/2017 8:00 AM ☐ All day event

End time Wed 7/26/2017 8:30 AM

[→ Join Skype Meeting](#)

This is an online meeting for Skype for Business, the professional meetings and communications app formerly known as Lync.

Join by Phone

Toll-free number: [+1 \(866\) 715-6499](#)

Toll number: [+1 \(719\) 325-2776](#)

[Find a local number](#)

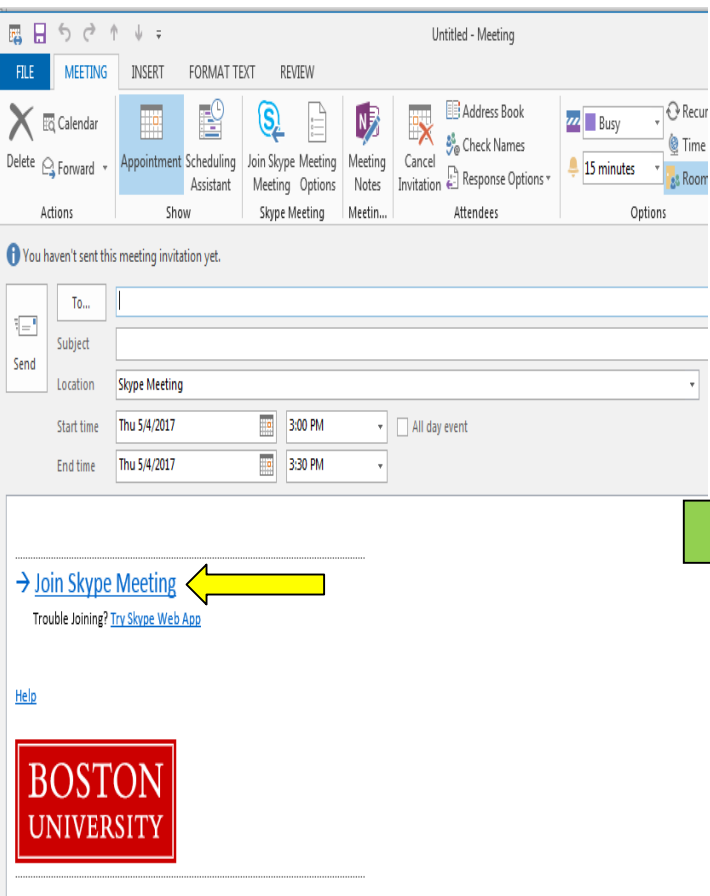
Conference ID: 3001787083

[Help](#)

- *When would someone use a bridge line?*

Skype Meeting Process—Join a Meeting

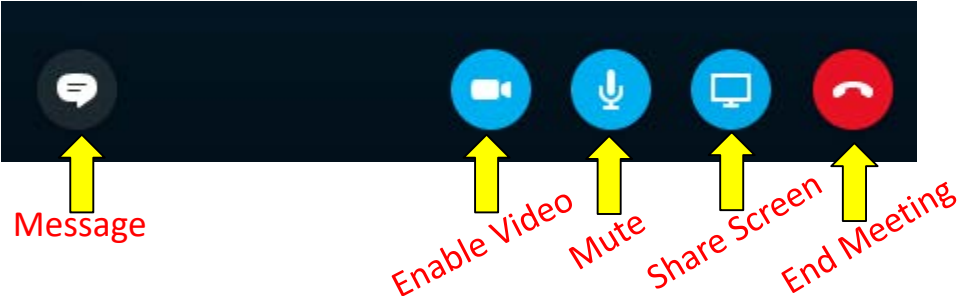
Click the “Join Skype Meeting” link



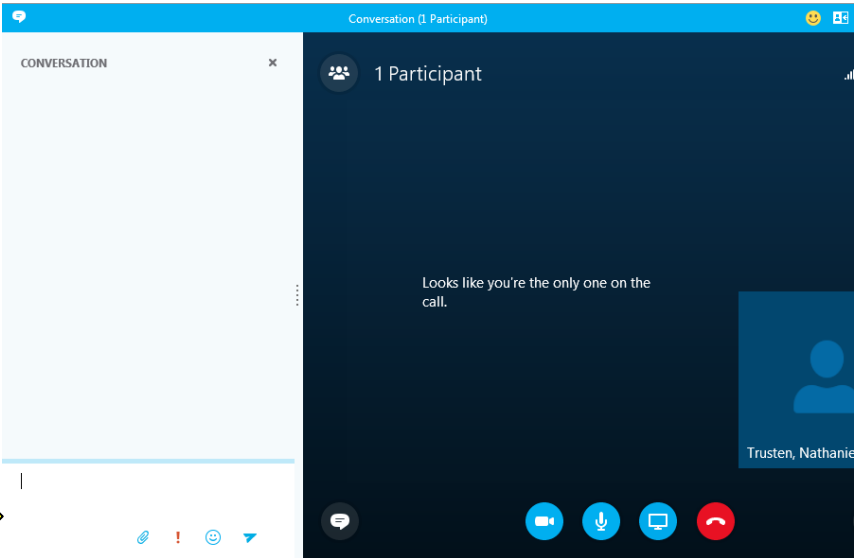
Skype meeting window opens



Controls

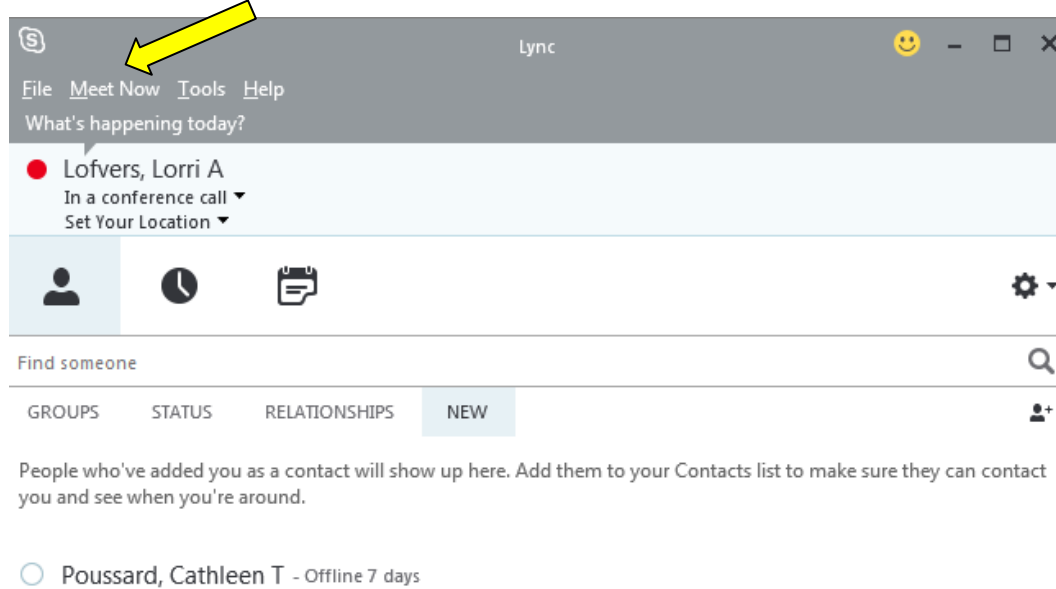


Send message to all attendees

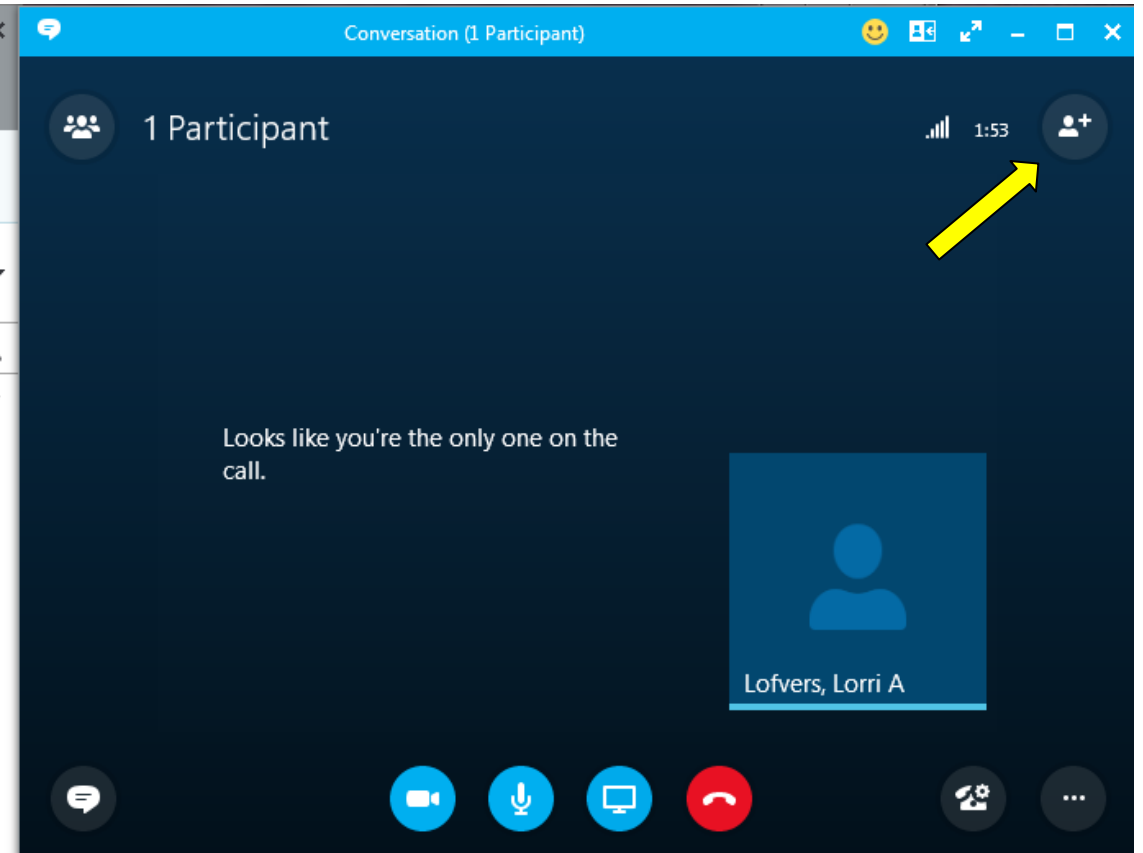


Initiate a Meeting Through Lync

Click on "Meet Now"



Click to Add Participants



Lync is also a great tool for communicating remotely!

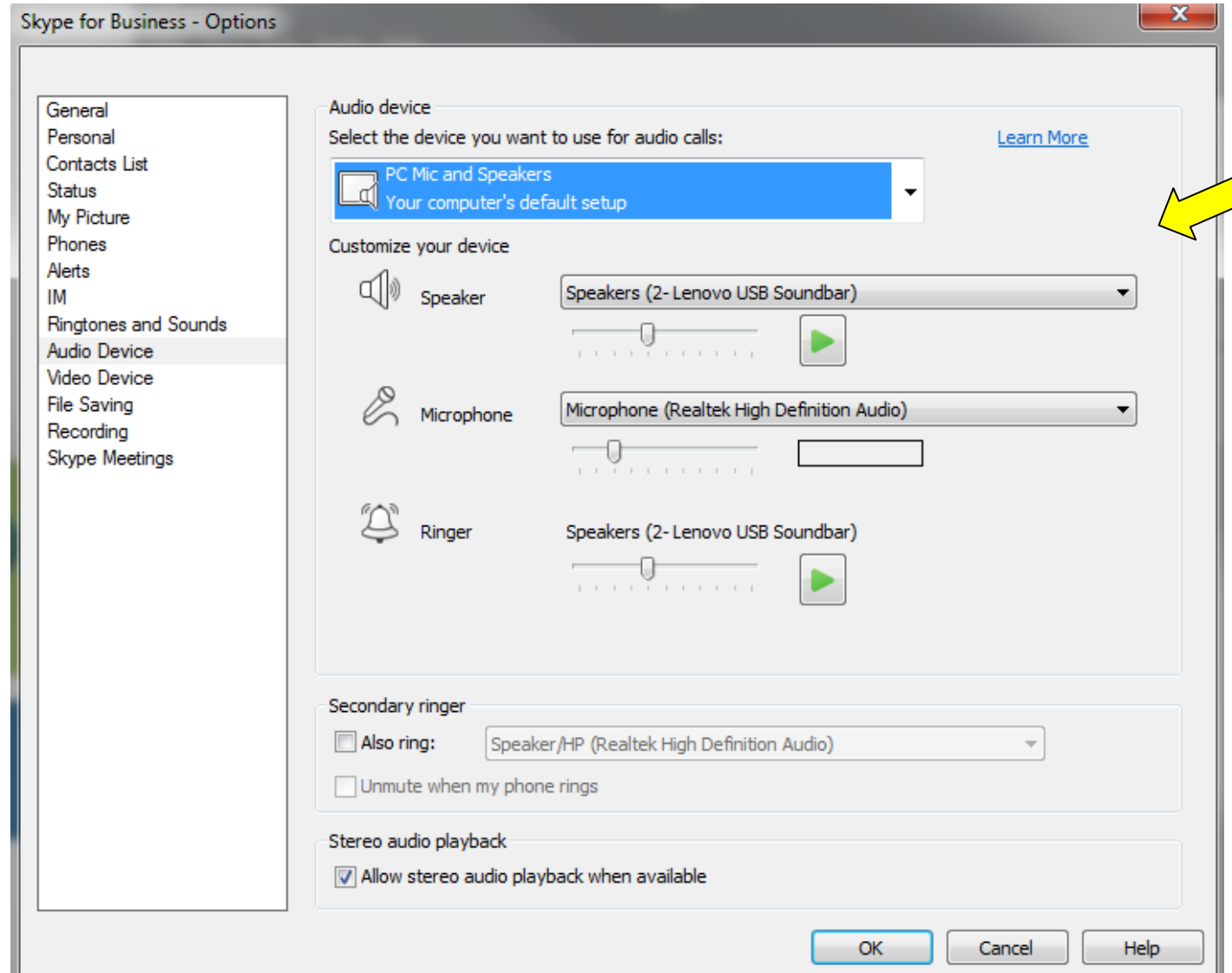
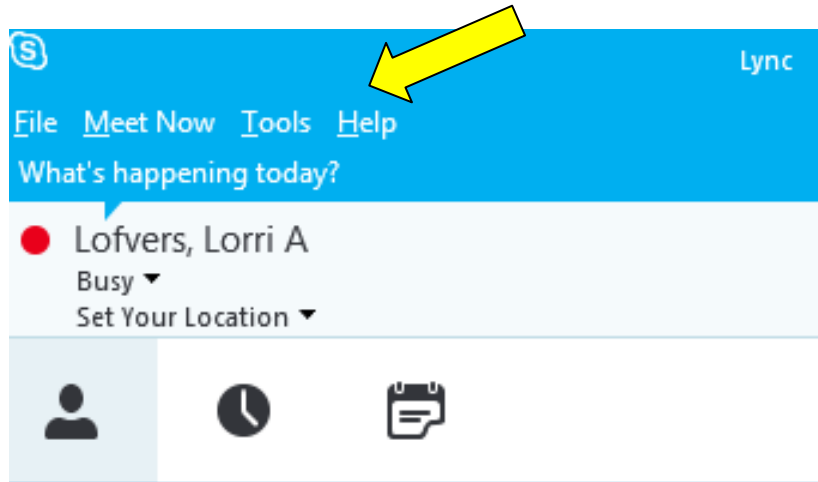
Technology Preparation

- Familiarize yourself with
 - The tool (Skype for Business) and with any internet connections, display methods, power, remote devices, etc.
 - Dialing in/ selecting audio/video
 - Volume, Mute/Unmute
 - Sound equipment
 - Using messaging
- Ahead of time
 - Download software if needed. This will allow time to get technical assistance if necessary.
 - If you use your home computer, download Skype for Business in advance. Do not use regular Skype.
 - The Skype for Business phone App is also an alternative.
 - Browser may make a difference.
- Video

What other tips or experiences would you like to share?



Test Audio, Video, and More



Techniques for Virtual Meetings

- Make sure everyone knows who is in the meeting
- Actively engage everyone
 - Encourage participants to share ideas and contribute to the group
 - Solicit feedback regularly to help keep everyone involved and feeling welcome to participate. Build this into the meeting format and agenda by soliciting feedback, having Q&A times, conducting surveys and polls, etc.
- Attend to the focus and pacing
 - Present the agenda and meeting objectives at the outset
 - Present the meeting materials onto the screen in the meeting software and in the room
 - Tackle critical topics early in the meeting, when participants are fresh.
 - Keep meetings shorter. If more than 90 minutes is needed, split it into 2 sessions. For those over 60 minutes, build in a break at a designated time.

Guidelines for Virtual Participants

- Identify yourself each time you make a contribution so everyone knows who is talking
 - For presentations or lectures, the presenter would only need to introduce himself/herself at the outset and periodically as additional people join the meeting.
- Be respectful of other peoples' time by focusing and avoiding multi-tasking
- Stay on mute when not making an immediate contribution. Go off mute to share in discussion, comments, humor, and affirmations. Minimize background noise
- Since remote participation reduces the ability to use visual cues and body language, ask questions and use the messaging feature
- Understand the agenda and the flow, so you will know when and how input is welcome
- Materials to share:
 - Provide Meeting Owner with a copy of materials you want to display for the group; send them to everyone in advance if applicable.
 - Plan to be succinct
 - Read advance materials you receive from others



Role of the Meeting Owner or Leader



- Start the skype session on time or a few minutes ahead; stay through the end
- Set up sound equipment and make sure everyone can hear
- Ensure participants know who is in the room and who is on the phone at all times
- Make sure everyone knows who is talking (state the name of the participant; remind participants to identify themselves throughout)
- Be prepared to manage the display. Skype puts a yellow box around items you are sharing.
- Monitor messages that come in; if the meeting leader will be actively presenting, ensure someone else is available to address messages
- Have a plan for addressing technical issues. Everyone's' participation is valuable and it's important to be able to continue the meeting and also address an individual's technical issues.
- Check in with participants throughout
- Assemble all materials to be used, in advance. This ensures the content is ready and can be shared. Screen sharing is excellent but a back up plan is often needed for various reasons.
 - If materials are not going to be displayed, provide links or attachments ahead; read what is written on charts as they are developed
- Thank participants at the end, include virtual participants in closedown steps such as asking for questions, final comments, and confirming action items. Make sure people know the meeting ended.
- Arrange periodic meetings where everyone would be expected to attend onsite to build the sense of community and connection.

Summary Tips for Effective Meetings

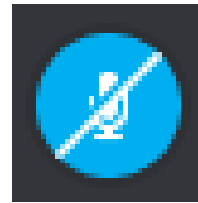
- Prepare Ahead
 - Identify what visuals to share
 - Send out materials people are expected to reference or review
 - Set the expectation that people will read the advance materials but don't assume everyone has done so
 - Ask presenters, subject matter experts, etc. to prepare ahead of time
 - Share the agenda and goals in advance; participants should know when their parts are due to come up
 - Connect and Engage People
 - Make sure everyone knows who is there, why each person is there
 - Encourage collaboration and facilitate connections where there are interdependencies
 - Share the participating, ask people for input, feedback, expertise, presentations, minutes, ownership of some next steps
 - Identify Action items with a clear statement of the action item, the owner, and due date
 - Start and End on time
 - Take Minutes
 - Distribute them to participants and others that can make use of the information (use a distribution list)
 - Include discussion points, decisions, attendees, action items, next steps
 - Use the ENSA Minutes Template (see resources)
- *What do you find key to an effective meeting?*

Skype Basics for Virtual Meetings – Optional Practice

- Basic Elements of a Skype Meeting
 - Send a Skype meeting invitation (Outlook, Lync)
 - Enter into a Skype meeting
 - Mute/Unmute
 - Write in a comment
 - Share your screen
 - Use a microphone/speaker (sometimes called a Puck)
- Experiment with Roles of Meeting Owner, Meeting Participant
 - *Debrief after experimenting*



Join Skype
Meeting



Q&A and Appendix

- Questions or Tips to Share?
- Additional Resources
 - Microphone and Camera
 - Training Suggestions
 - ESO Network Operations Support

Additional Resources

- Tech Web Training
 - <http://www.bu.edu/tech/services/cccs/conf/lync/about/>
 - <http://www.bu.edu/tech/services/cccs/conf/lync/about/meetings/>
- Microsoft Skype:
 - <https://technet.microsoft.com/en-us/library/skype-for-business-online-meetings.aspx>
- Article by author Nancy Settle-Murphy:
 - <https://hbr.org/2015/03/how-to-run-a-great-virtual-meeting>
- ENSA Minutes Template:
 - [ENSA Meeting Template](#)

Learn More about Skype for Business

Meeting Minutes

Project or Name or Meeting Name:

Meeting Date:

Time:

Location:

Meeting Facilitator/Owner:

Attendees:

Requested Attendees: (or list those that could not attend)

Copied: (List others included in the minutes distribution)

Minutes Taken by:

Meeting Objectives: (purpose)

Agenda: (Items to be covered in the meeting to achieve the meeting objective.)

Meeting Notes:

(Labeled/grouped by topic where feasible to make it easier for the reader to scan for key information.)

Decisions: (Consensus agreement during meeting)

Action Items:

#	Action Needed	Who will take action	Date Needed	Status

Be clear about the action needed: for example, instead of "research funds and how active they have been", "Provide a list of all existing fund numbers and specify those that have not been used in more than 10 years", if action item is long, include interim milestones such as "provide list of all fund numbers by March 24", and "Identify those that have not been used in more than ten years by April 20".

Next Steps: (This is helpful for crystalizing objectives for the next meeting and shoring up action items. It also can help the team look farther ahead to set and manage milestones.)

Microphone & Camera

Skype Functions	Instructions
Microphone	Confirm Microphone is Enabled: <ul style="list-style-type: none">• https://support.lenovo.com/us/en/solutions/ht104054
Audio Test	Go to Lync Widow: <ul style="list-style-type: none">• Tools – Audio Device Settings – Audio Device – Select appropriate device.
Camera	Turn Camera On: <ul style="list-style-type: none">• Tools – Video Device Settings – Video Device – Camera Settings – Uncheck Privacy (if checked) – Apply – Ok. Turn Camera Off: <ul style="list-style-type: none">• Tools – Video Device Settings – Video Device – Camera Settings – Check Privacy box – Apply – Ok.

How is ESO Network Operations Supporting the Virtual Meeting Tool Skype for Business?

- If your desktop computer needs a microphone, these can be requested.
- If you conduct meetings with several people in the room, external speakers, called pucks, can be requested.
- If attendees need to join by phone, alternatives include:
 - Give out the phone number of the room or office you will be in, or a cell number, or arrange for you to call them (Skype has the capability for you to request that you be called at a phone number you provide.)
 - Request an individual bridge line, which provides an alternate call-in number for a per-minute usage fee.
- If you have technical issues or are requesting a bridge line, a microphone, or external speaker, send a ticket to ESO-NetHelp@bu.edu

Delivery Notes for using this PowerPoint as Training

- This session can be delivered with half of the group “remote” and half in a common meeting room, then switch some of the roles locations. This will give people a feel for both perspectives
- Model the behaviors outlined in the notes
- Point out the behaviors (introductions, who's talking, checking in , etc.)
When done well, techniques are seamless and participants barely notice
- Use the speaker, use mute, simulate sound issues
- Use the messaging feature
- The blue italicized items on the slides are intended to maintain energy and engagement for people in the room and for those attending virtually

Thank you for your time!

*(Formally close the meeting so folks on the phone are clear that it has ended.
This also serves as a nice reminder to disconnect from Skype.)*