

Fulcrum Connection COURSE CLUB KIT for:

Virtual Meeting Mastery:

How to Lead Virtual Meetings
that Produce the Most Results
for the Investment



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COURSE SYNOPSIS

Virtual Meeting Mastery is a comprehensive, step-by-step approach drawn from over 10,000 hours of experience as an in-person Certified Professional Facilitator plus 5 years of on-line experience facilitating meetings to lead virtual meetings that participants rate as a great experience.

Virtual meetings are a challenge because while a virtual meeting can be easier to schedule than a co-located meeting, virtual meetings require more intentionality from meeting leaders than co-located meetings. Atlassian surveyed 5,000 knowledge workers in March 2024 and discovered that meetings are ineffective 72% of the time because of lack of clarity for the meeting purpose, the steps to meet the meeting purpose, and the role of participants in the meeting. Intentionality as a meeting leader means being clear on the meeting purpose, the steps to achieve the purpose, and the role of meeting participants in achieving that purpose

It is not that leading remote meetings is harder than leading in-person meetings, it is that leading remote meetings is harder in different ways than leading in-person meetings. This is because virtual meetings do not mimic in-person meetings - they are completely different. For example, you cannot move your head around and watch other people's reactions to what is going on in a remote meeting. You also cannot express feelings to one or more colleagues in a remote meeting with a glance or eye contact. So, the skills required to lead virtual meetings are different than the skills required to lead in-person meetings.

Virtual Meeting Mastery enables learners to determine mindsets, tactics, and practices that improve their current level of remote meeting mastery. Mindsets for *Virtual Meeting Mastery* include starting with purpose and trust, embracing brain health, and the power of planning. The tactics and practices for *Virtual Meeting Mastery* include ways to leverage the benefits of virtual meetings, ways to work within the constraints of virtual meetings, the keys to remote meeting leadership, avoiding the barriers to remote meeting leadership, experiencing the host and participant perspectives of a remote meeting platform, designing norms for virtual meetings, optimizing virtual meeting return on investment, designing a great remote meeting, and facilitating virtual meetings that participants love.

AUTHOR BIO

Valerie Patrick, Ph.D. and President of Fulcrum Connection LLC, is author of *When Bad Teams Happen to Good People: Your Complete Repair Guide for Successful Teamwork* published by Career Press in 2019 (<https://www.amazon.com/gp/product/1632651823>). Dr. Patrick also created the Team Cast, a series of YouTube videos that provide practical and research-based tips in a 3-minute video format to help with team skills (see <https://www.youtube.com/channel/UCfJC-LyV5HBsHp4HiHPMihA>).



Dr. Patrick has over 10,000 hours of corporate experience as a team leader, is a Certified Professional Facilitator through the International Association of Facilitators, is a Certified Creative Problem Solving Facilitator through the Creative Problem Solving Group, and is certified with distinction in the Foundations of NeuroLeadership by the NeuroLeadership Institute. Dr. Patrick has accumulated over 10,000 hours of experiences as a professional facilitator and has been facilitating on-line meetings for clients since 2020.

Dr. Patrick's 25-year corporate career gave her experience in several different disciplines including corporate research, chemical engineering, process development, product innovation, industrial design, market development, supply chain management, change management, and sustainability. Dr. Patrick founded Fulcrum Connection LLC in 2013 which provides empowerment skills and group experiences for workplace creativity and contribution to flourish.

COURSE DISCUSSION QUESTIONS

Module 0: Welcome to Virtual Meeting Mastery

0

Introduction

- What is a key insight or lesson you have from reading a book or article about teamwork or attending a well-led meeting?
- Think of a recent meeting you attended or led. How would you rate that meeting on a scale of 1 for poor to 5 for excellent (2 for below average, 3 for average, 4 for above average) and why?
- What are you most interested in doing to improve your remote meeting mastery based on this module's assignment?

Module 1: Leading Meetings Virtually versus In-Person

1

Lesson 1: Leveraging Benefits of Remote Meetings

- What do you need in order for learning to take place (recall times you have been successful and unsuccessful in learning)?
- From your experience, what has been a benefit of remote meetings and why?
- What action do you most want to take to leverage a benefit of remote meetings based on this lesson's assignment?

COURSE DISCUSSION QUESTIONS

Module 1: Leading Meetings Virtually vs In-Person cont.

2

Lesson 2: Working with Constraints of Remote Meetings

- What is the Internet download speed where you are right now (see Ookla free speed test)?
- From your experience, what has been a constraint of remote meetings and why?
- What action do you most want to take to work within a constraint of remote meetings based on this lesson's assignment?

3

Lesson 3: What Works for Virtual Team Leadership

- From your experience, describe what you like most in a meeting leader and why. Does this trait translate to a remote environment?
- Recall an experience from your life that was undeniably stressful. What do you appreciate about yourself about how you got through that? What did you learn or how did you grow from that experience?
- What is an action you would like to take to improve your brain health based on this lesson's assignment?

4

Lesson 4: What Doesn't Work for Virtual Team Leadership

- What is an example of a habit you have been trying to break or change and how many times have you tried?
- From your experience, describe what you like least in a meeting leader and why. Does this trait translate to a remote environment?
- What is an implementation intention you developed in this lesson's assignment?

COURSE DISCUSSION QUESTIONS

Module 1: Leading Meetings Virtually vs In-Person cont.

5

Lesson 5: Primer on Zoom

- How might you rate your proficiency on Zoom from 1 for low to 5 for high (2 for below average, 3 for average, 4 for above average) and why?
- What features of Zoom have you not used as a meeting leader but would like to use and why?
- What is your preferred virtual meeting platform and why?

6

Lesson 6: Primer on Webex

- How might you rate your proficiency on Webex from 1 for low to 5 for high (2 for below average, 3 for average, 4 for above average) and why?
- What features of Webex have you not used as a meeting leader but would like to use and why?
- What is your preferred virtual meeting platform and why?

7

Lesson 7: Primer on MIRO

- How might you rate your proficiency on MIRO from 1 for low to 5 for high (2 for below average, 3 for average, 4 for above average) and why?
- How might MIRO improve your virtual meeting leadership?
- What is your preferred digital collaboration platform and why?

COURSE DISCUSSION QUESTIONS

Module 1: Leading Meetings Virtually vs In-Person cont.

8

Lesson 8: Primer on Open AI

- How might you rate your proficiency on AI for virtual meetings from 1 for low to 5 for high (2 for below average, 3 for average, 4 for above average) and why?
- How might AI improve your virtual meeting leadership?
- What are your preferred ways to use AI for remote meeting leadership?

Module 2: Elements of Remote Meeting ROI

1

Lesson 1: Why Remote Meetings are Hard

- When are you most likely to be distracted and what are you most likely to be distracted by during a virtual meeting led by another person?
- Rate on a scale from 1 for poor to 5 for excellent (2 for below average, 3 for average, 4 for above average) how effective communication was in the last virtual meeting you attended or led. What is the reason for your rating?
- What is your plan to address the challenge of connection taking longer in virtual meetings from this lesson's assignment?

COURSE DISCUSSION QUESTIONS

Module 2: Elements of Remote Meeting ROI cont.

2

Lesson 2: Top Norms for Remote Meetings

- Did your last meeting include norms? If so, then how did they help? If not, then how might norms have helped?
- Does your organization have a virtual meeting norm to keep cameras on? Why or why not?
- What norms are you most interested in implementing at a remote meeting from this lesson's assignment?

3

Lesson 3: Disruptive Behavior in Meetings

- What is the most disruptive behavior you have witnessed in a meeting and how did it impact you?
- Have you experienced or witnessed emotion contagion? Describe what happened and how it made you feel.
- How might you handle conflict in a remote meeting you lead?

4

Lesson 4: Media and Mode

- What is an example of a meeting that used the wrong media or mode and why?
- What meeting types are most relevant for you right now: cadence, catalyst, or learn and influence? Provide examples.
- What did you learn from this lesson's assignment?

COURSE DISCUSSION QUESTIONS

Module 2: Elements of Remote Meeting ROI cont.

5

Lesson 5: Costs for Remote Meetings

- How might you estimate meeting costs for participants whose salaries you do not know?
- How do your cost estimates compare to those of others for this lesson's assignment?
- How might you improve the estimate of costs for the virtual meetings you lead?

6

Lesson 6: Value from Remote Meetings

- What is an example of structural capital (knowledge that has been operationalized or otherwise recorded or documented) in your organization or work?
- How did you assess value for the hypothetical meeting in this lesson's assignment?
- How might you improve the assessment of value for the virtual meetings you lead?

7

Lesson 7: Top Strategies for Increasing Meeting ROI

- What types of pre-meeting assignments have you used or would you like to use in the virtual meetings you lead?
- What proven facilitation techniques have you used or would you like to use in the virtual meetings you lead?
- How might you improve the return on investment for the virtual meetings you lead?

COURSE DISCUSSION QUESTIONS

Module 3: Steps to Optimize Remote Meeting ROI

1

Lesson 1: Determine Type of Interaction Needed

- How might you increase interdependence (tasks, resources, rewards, or goals) to increase engagement in the virtual meetings you lead?
- How might the interaction continuum (linear, coordination, cooperation, or collaboration) affect the virtual meetings you will attend in the future?
- In what ways does level of formality of a meeting affect pre-meeting planning in your organization?

2

Lesson 2: Identify Meeting Context

- What are the current strategic priorities of your organization? If you do not know, then how might you find out?
- What are examples of tangible value that virtual meetings have delivered in your organization?
- What are examples of intangible value that virtual meetings have delivered in your organization?

3

Lesson 3: Explore Meeting Parameters

- How might you increase the motivation of meeting participants to engage in your virtual meeting and implement the outcomes?
- How might you increase the value your virtual meeting delivers through pre-meeting research?
- How might level-setting with content relevant to your meeting purpose improve virtual meeting outcomes?

COURSE DISCUSSION QUESTIONS

Module 3: Steps to Optimize Remote Meeting ROI cont.

4

Lesson 4: Decide Meeting Design Parameters

- Which of the five meeting purpose types for virtual meetings (working with information, decision-making or prioritizing, brainstorming or innovating, addressing problems or challenges, creating a plan or strategy) are most relevant to you and why?
- How might you maximize the value of a virtual meeting depending on the type of meeting outcome (learning, identifying problems or opportunities, solving problems, enabling action, making decisions)?
- How do the purpose, outcomes, and objectives you came up with for this lesson's assignment compare to those of others?

5

Lesson 5: Meeting Design

- Think of a meeting that got you energized and engaged as a participant. What was the design of that meeting?
- How right-sized in terms of number of participants would you say the virtual meetings you have led have been and why or why not?
- In what ways is the meeting design you came up with for this lesson's assignment similar to and different from the meeting designs of others?

COURSE DISCUSSION QUESTIONS

Module 3: Steps to Optimize Remote Meeting ROI cont.

6

Lesson 6: Meeting Facilitation Plan

- Think of a meeting you attended that was well facilitated from your point-of-view. What did the facilitator or meeting leader do that worked so well?
- Which of the proven facilitation processes provided in this lesson's assignment are you most interested in using for a virtual meeting you lead?
- How might you improve the facilitation of the virtual meetings you lead?

7

Lesson 7: Prepare for Social & Technical Disruptions

- Recall an awkward, disruptive moment in a meeting. How did the meeting leader handle the situation? How might the meeting leader have handled the situation better?
- What was the worst technical disruption either you or a meeting participant experiences in a virtual meeting?
- How is your checklist for social and technical disruptions in this lesson's assignment similar to and different from the checklist of others?

COURSE DISCUSSION QUESTIONS

Module 4: Tips for Remote Training

1

Lesson 1: Tips for Remote Live Training

- In your experience, how is live training different from and similar to meetings?
- How might the attention principle for adult learning (that adults can maintain focused attention for up to 20 minutes at a time) be applied to other types of virtual meetings?
- How might the generation principle for adult learning (our brains encode and retain information best when we generate connections by considering how the information is relevant to ourselves, by explaining the information to others, and by drawing insights from the information) be applied to other types of virtual meetings?

2

Lesson 2: Tips for Remote Asynchronous Training

- How might you compare and contrast live virtual training and asynchronous training (on-line training at your own pace)?
- What is your best asynchronous training or live online training experiences and why?
- Provide feedback to each other on the learning objective and rubric created in this lesson's assignment.

COURSE DISCUSSION QUESTIONS

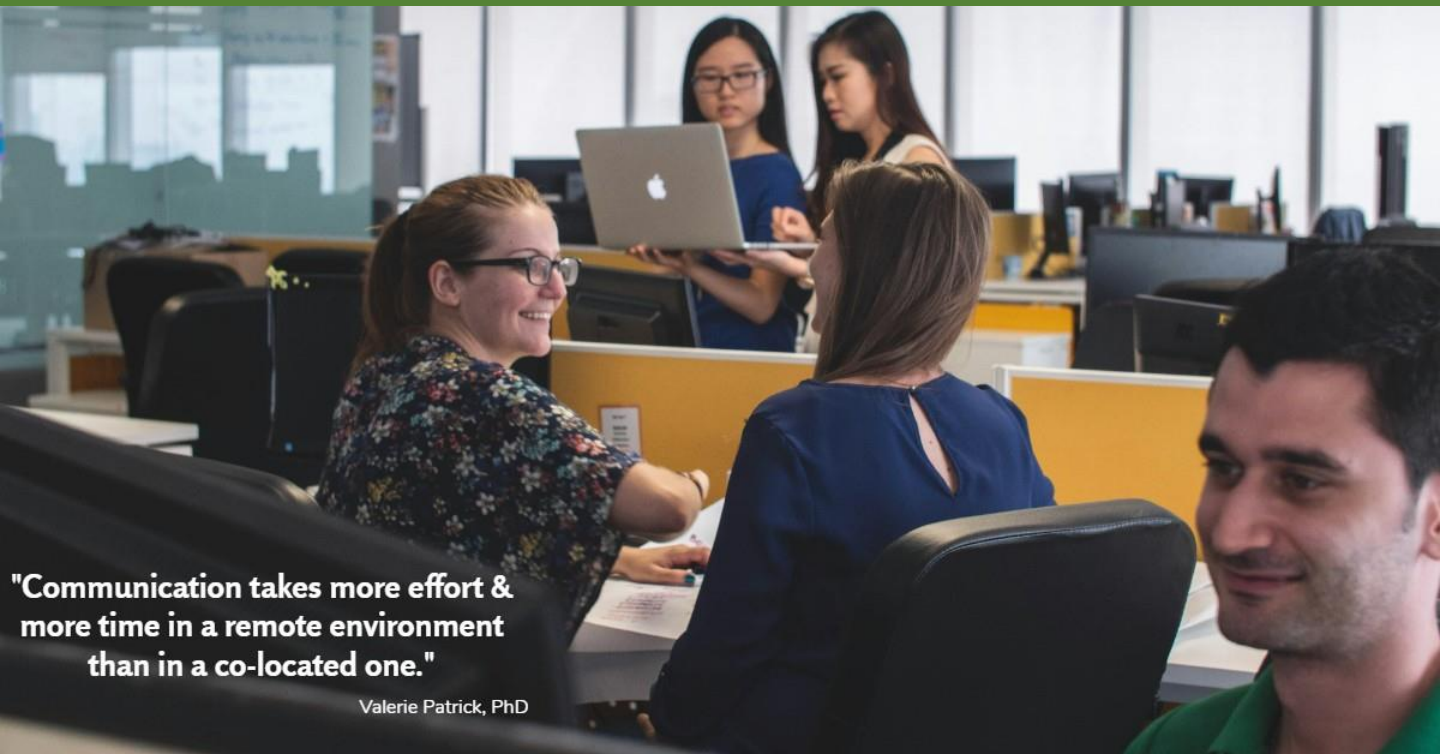
You are invited to reach out to the instructional designer for this course to share insights or ask your unaddressed questions about the course at the Remote Meeting Mastery LinkedIn group here:

<https://www.linkedin.com/groups/13121755/>



MORE CONTENT ON VIRTUAL MEETINGS

Communication is more difficult in a remote environment because of the lack of body language, energy, and immediate feedback compared to a co-located meeting. Research shows that 70 to 80% of a speaker's message is retained not so much through words but more through tone, facial expression, and body language. Tone, facial expression, and body language are more difficult to discern in a virtual meeting than in a co-located meeting. Research also shows that energy and atmosphere can be generated when people are physically present in a room and this, in turn, can create a more focused and interactive environment promoting engagement and collaboration. I once facilitated a meeting in a ballroom in which the break-out groups were buzzing so loudly with exciting ideas that you could feel the positive energy. Finally, research shows that personalized attention which is easier to give in an in-person meeting than in a remote meeting is more likely to lead to the type of immediate feedback needed for improved decision-making and collaboration efforts. The skills needed to improve communication during remote meetings are those that build in more time for communication.




"Communication takes more effort & more time in a remote environment than in a co-located one."

Valerie Patrick, PhD

MORE CONTENT ON VIRTUAL MEETINGS

Norms is how you leverage the behaviors that promote performance and minimize the behaviors that impede performance in a group. Creating and using norms for a group of people is part science and part art. Science tells us to establish behaviors that create psychological safety by meeting participant's social needs so participants are more likely to engage in productive and creative ways. Art dictates the format of, number of, and how to implement the norms so they are most likely to be followed. The norms used for in-person meetings are insufficient for virtual meetings where behaviors impacting listening, engagement, and digital environment are particularly important.

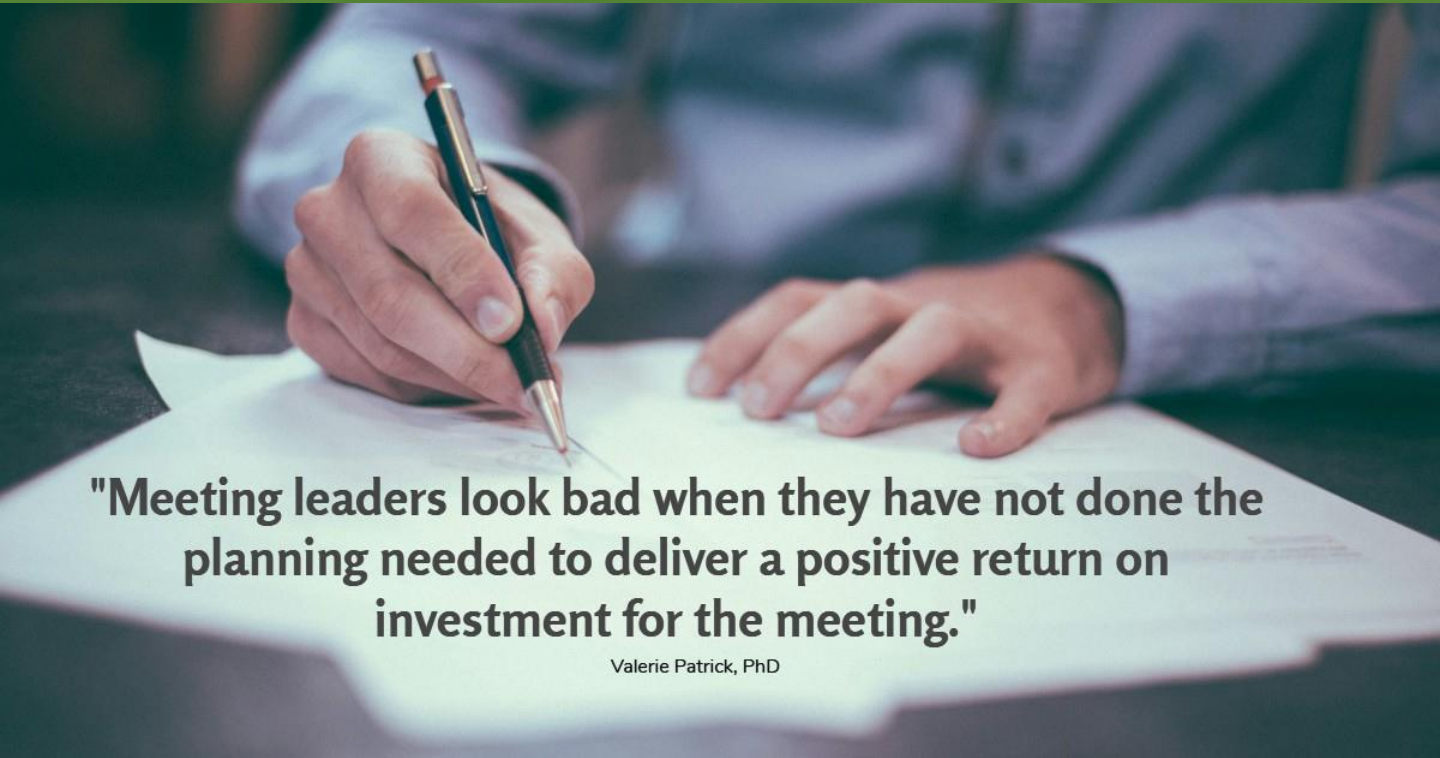


"Cameras on in a virtual meeting to reduce the cognitive load of ascertaining what others are doing or thinking during the meeting."

Valerie Patrick, PhD

The type of meeting leader to look up to is the meeting leader who knows what they are doing. More specifically, the best meeting leaders know who needs to be in the meeting, how to get people to their meeting, how to engage people in the meeting, and how to get results from a meeting.

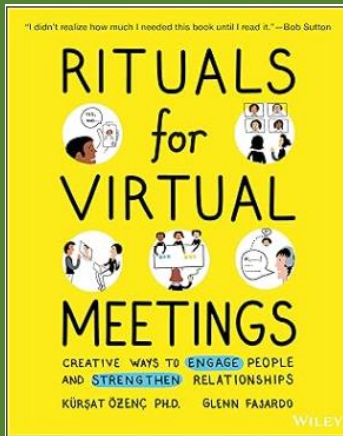
MORE CONTENT ON VIRTUAL MEETINGS



"Meeting leaders look bad when they have not done the planning needed to deliver a positive return on investment for the meeting."

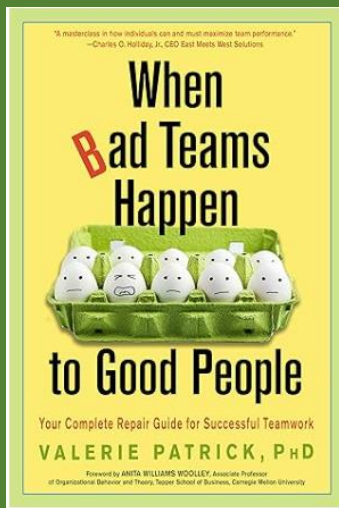
Valerie Patrick, PhD

MORE RESOURCES RECOMMENDED BY THE INSTRUCTOR



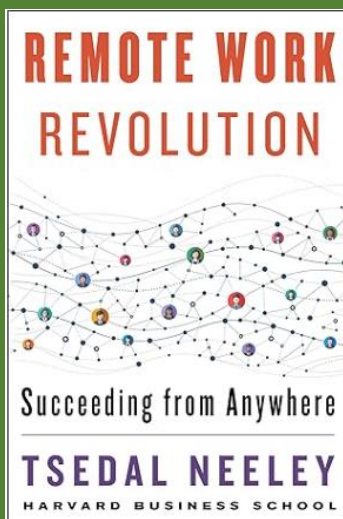
Kursat Ozenc and Glenn Fajardo. *Rituals for Virtual Meetings: Creative Ways to Engage People and Strengthen Relationships.* (New York: Wiley), 2021.

This book is jammed packed with creative and science-backed techniques to increase engagement in virtual meetings. There are sixty-four rituals described in this book with the time needed, the goal of the ritual, and step-by-step instructions to implement the ritual.



Valerie Patrick. *When Bad Teams Happen to Good People: Your Complete Repair Guide for Successful Teamwork.* (New York: Career Press), 2019.

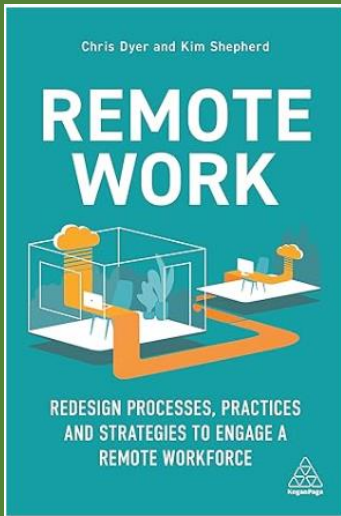
“This timely book provides readers with a new way of thinking about work and survival strategies for those who find themselves on bad teams. Readers who are looking for a playbook that can help them to understand and develop soft skills needed for teamwork will be eager to have a copy nearby.”—Booklist



Tsedal Neeley. *Remote Work Revolution: Succeeding from Anywhere.* (New York: Harper Business), 2021.

This book addresses questions most asked about overcoming the challenges of hybrid and remote work. “I often talk about the importance of trust when it comes to work: the trust of your employees and building trust with your customers. This book provides a blueprint for how to build and maintain that trust and connection in a digital environment.”—Eric S. Yuan, founder and CEO of Zoom

MORE RESOURCES CONTINUED



Chris Dyer and Kim Shepherd. Remote Work: Redesign Processes, Practices, and Strategies to Engage a Remote Workforce. (London: Kogan Page), 2021.

This book offers the perspective of two industry experts who successfully transitioned their respective workforces to remote models before the pandemic. They share their lessons, tactics, and strategies that buoyed their success.