: What skills do team leaders need for conducting effective virtual decision-making meetings?

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In general, team leaders need planning, organizing, staffing, directing and controlling skills (cf., Huber, 1980), but the technology setting of virtual decision-making meetings creates a need for new and more sophisticated behaviors in each of these skill areas. This Ask Dan! question is motivated by both a personal "need-to-know" (see Power, 2/14/2006) and by the increasing importance and use of communications-driven DSS for conducting meetings. A virtual decision-making meeting is conducted by means of information technologies. The term "virtual" distinguishes a conceptual, technology supported meeting from a physical, face-to-face meeting. Virtual meetings may be conducted using teleconferencing, online collaboration tools, web conferencing and/or videoconferencing.

Each of these technology solutions creates challenges for team leaders. Teleconferencing is a phone call connection where many different calls are joined into a single conversation. Online collaboration tools include e-mail and private Web sites that allow file and document sharing and the use of message boards. Web conferencing is teleconferencing with the addition of Web capabilities for interactive presentations, using PowerPoint, Excel or other documents. Audio can be transmitted by telephone or the Internet. Videoconferencing is the interactive use of video, computing and communication technologies to allow people in two or more locations to meet. Videoconferencing often includes integrated web conferencing tools. None of these communications-driven decision support solutions has the richness and capabilities inherent in a face-to-face meeting.

In a recent article at Microsoft-UK, James Rieley notes "In this virtual world, many organisations are conducting meetings with attendees from all parts of the world. That is the good news. The bad news is that in many cases, one of the unintended consequences of this form of decision-making is that the meetings are less-than-effective, and the outcomes of the meetings are not making their way down through the organisations as well as they need to. ... The problem lies in the fact that participants in virtual meetings don't seem to

have any structure for conducting virtual decision-making." Rieley then offers three suggestions related to avoiding multi-tasking, using a facilitator and keeping an action log.

According to Jim Davis of Development Dimensions International, "All meetings, virtual or face-to-face, require preparation, a clear purpose and effective leadership. When you lead a virtual meeting, you still must do all of the things you did for an effective traditional meeting. But a virtual meeting requires excellent preparation, leadership and follow-up because participants might be in different time zones, speaking different languages and using various technologies." Jim noted some problems in virtual meetings: it can be "difficult to keep track of who is speaking and who might be joining or leaving a meeting", it is difficult to "judge reactions or read body language," and equipment failure can occur bringing a meeting to a halt. Jim and DDI (www.ddiworld.com) offer 25 tips for leading and participating in virtual meetings.

George Huber argued in his 1980 book on Managerial Decision Making that "the performance and satisfaction of a decision group are determined to a great extent by the quality of its leadership (p. 176)." In 1986, I worked on a skills book with 3 colleagues and Dave Schweiger was our expert on team skills. In Chapter 6 we discussed "Developing Strategic Management Teams" and concluded that effective top management teams can foster the acceptance of and commitment of executives to strategic decisions. Since the mid-1980s technology has expanded what team leaders need to know about leading and managing decision groups and teams, but much of the advice from Huber (1980) and Power et al. (1986) however, remains useful. The remainder of this column will update and expand upon conventional wisdom about conducting decision-making meetings. Learning the following fifteen skills seems especially important for conducting effective virtual decision-making meetings. Based on Davis, Huber, Power et al., and Rieley:

1. Establishing a meeting time. When scheduling a virtual meeting, be aware of time zones and be fair and flexible in choosing a time for the meeting. A regular meeting time helps in scheduling other member activities.

2. Inviting participants. Make sure that those who will be affected by a decision have an opportunity to participate. A number of sources indicate a maximum of 12 people is appropriate for a virtual meeting, but DDI recommends "no more than eight participants".

3. Developing a meeting agenda. Identify issues relevant to the group, important deadlines, and group tasks. Written agendas give members clear expectations of a meeting's purpose and when possible should be emailed to members 2-3 days prior to a meeting. The agenda should be updated as a virtual meeting progresses.

4. Creating a communications list. DDI suggests creating and distributing a list that includes all of the participants' telephone, cellular phone and fax numbers, e-mail addresses and office locations. Also include an emergency phone number for participants to call if technology problems arise.

5. Building a cohesive team. A team leader should arrive at least 10 minutes early for a virtual meeting and should encourage social time prior to the start of a virtual meeting. In general, a team leader should encourage members to engage in cooperative behaviors.

6. Setting the rules for a meeting. Establish rules for participation and follow them! Determine who talks when? Determine how members can show if they agree or disagree? Determine if there are speaking time limits?

7. Conducting a team meeting. A team leader must be willing and able to assert control and yet be sensitive to group norms and member needs. More specifically:

7.a. Make the meeting brief, focused and well-structured. Usually a meeting should be scheduled for approximately 1 hour.

7.b. Help new participants feel connected by making introductions.

Make sure everyone knows why everyone else is attending the meeting.

7.c. At the beginning of each meeting, review the progress made to date and establish the task of the individual meeting.

7.d. Early in a meeting get a report from each member with a pre-assigned task.

7.e. At the end of each meeting, summarize what was accomplished, where this puts the group on its schedule, and what will be the group task at the next meeting.

7.f. At the end of each meeting, review action items for members to complete by the next meeting.

8. Managing the decision-making process by dividing the task into two steps idea generation and idea evaluation.

9. Managing the discussion to insure equitable participation. When appropriate prompt people to participate.

10. Using information displays. If you have the technology use it, and use it effectively.

11. Frequently checking for understanding of issues and alternatives.

12. If necessary, sanction members who seem to be distracted by multi-tasking, chat, or non-meeting activities.

13. Establishing expectations. A team leader needs to follow up after a meeting by email, phone and other means. Team members assigned projects need to understand the expectation is they will complete projects on time and at a high quality level. A team leader should constructively critique performance on projects and insure that assigned responsibilities are completed. In general, team members responsible for presenting specific analyses or information should do so in writing.

14. Evaluating the need for specialized computer supported group techniques like brainstorming. A team leader should be familiar with decision and planning structuring software from companies like GroupSystems.com and Facilitate.COM.

15. Providing follow up. Make sure that all participants receive a summary of the meeting and whiteboard notes.

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