Virtual Teaming:

Tools, Techniques, Tips & Etiquette

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2015 National Planning Community of Practice Training

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US Army Corps of Engineers
PLANNING SMART
BUILDING STRONG®

PEOPLE WORKING TOGETHER TO PROJECTS
ATLANTA PCoP WORKSHOP 2015
PROGRAM ALIGN, DELIVER & SUSTAIN PLANNING PROCESS

Presentation Format

- Holding Effective Virtual Meetings
- Virtual Teaming Tools
- Flyover Demonstration and How-To

Holding Effective Virtual Meetings

- What's Different?
- Tips
  - Before the meeting
  - During the meeting
  - After the meeting
- Discussion

What's Different?

-A solid objective(s)

-A tight agenda

-Involving meeting participants in the meeting preparation

-Staying on topic and on time during the meeting

-Documenting & disseminate decisions & actions for follow up.

+

- Technology
- Keeping people engaged & involved
- Getting your process to work online to achieve your objective(s)

What's Different?

- Communication and building trust in a virtual teaming environment can be difficult
- Most of our teams are virtual!
- Successful virtual teams require more effort
- We have the POWER to be successful!

Tip: Before the Meeting

Choose the best platform

- ❑ How many participants will be involved?
- ❑ What type of sharing is required? Who can share?
- ❑ Is this meeting part of an ongoing collaboration?
- ❑ What devices will people be using to connect?
- ❑ Is everyone part of the same organization?
- ❑ Where will people be joining from?
- ❑ What are the technology requirements?

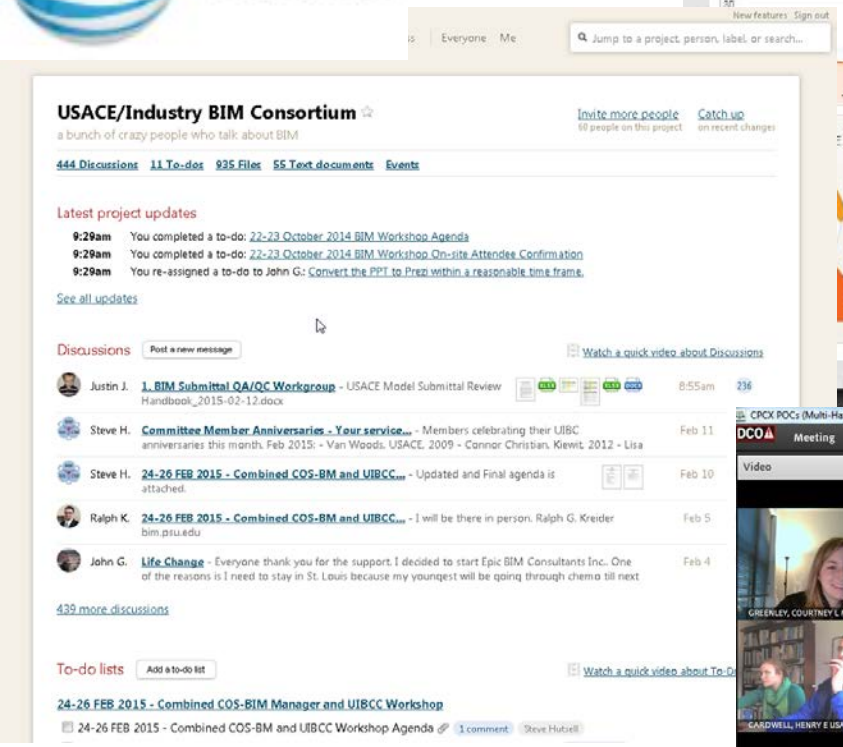
Source: Guided Insights: 10 Tips for Picking the Best Tech Tools for Your Next Virtual Meeting

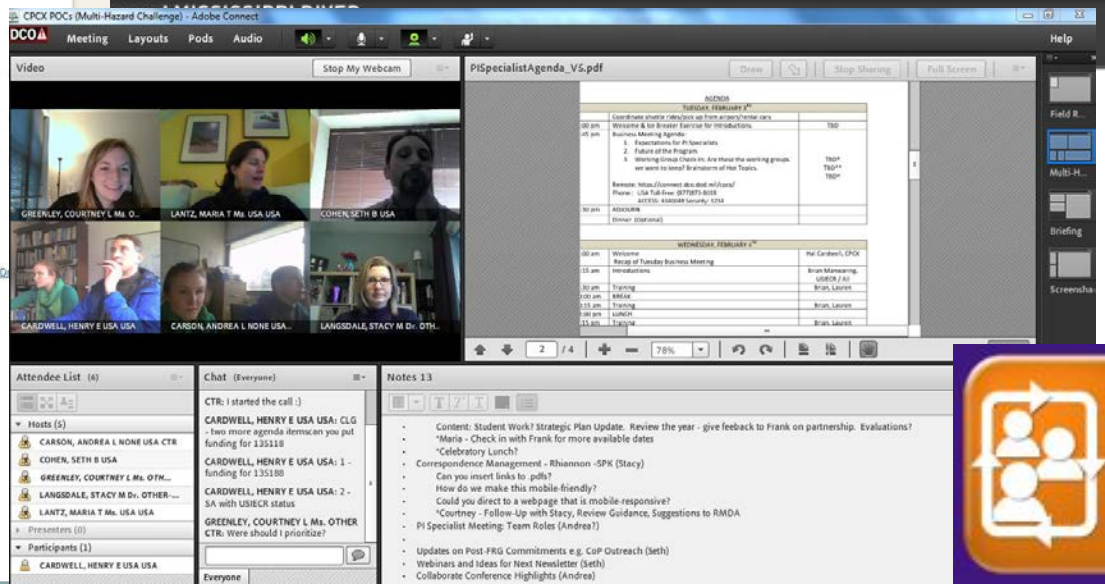
Virtual Interactive Platforms

MindMixer Overview: IowaLockandDamActionPlan.com

Interactive Website: to engage stakeholders and generate conversations amongst stakeholders prior to the workshop

at&t





Basecamp®

DCS

Tips: Before the Meeting

- Develop a Back-up Plan
- Avoid technical difficulties by:
  - Securing an alternative phone line & webinar space
  - Test passcodes
  - Do a sound and web cam check
  - Offer testing for participants new to the platform
  - Designate a facilitator

Tip: Before the Meeting

Get to know the technology

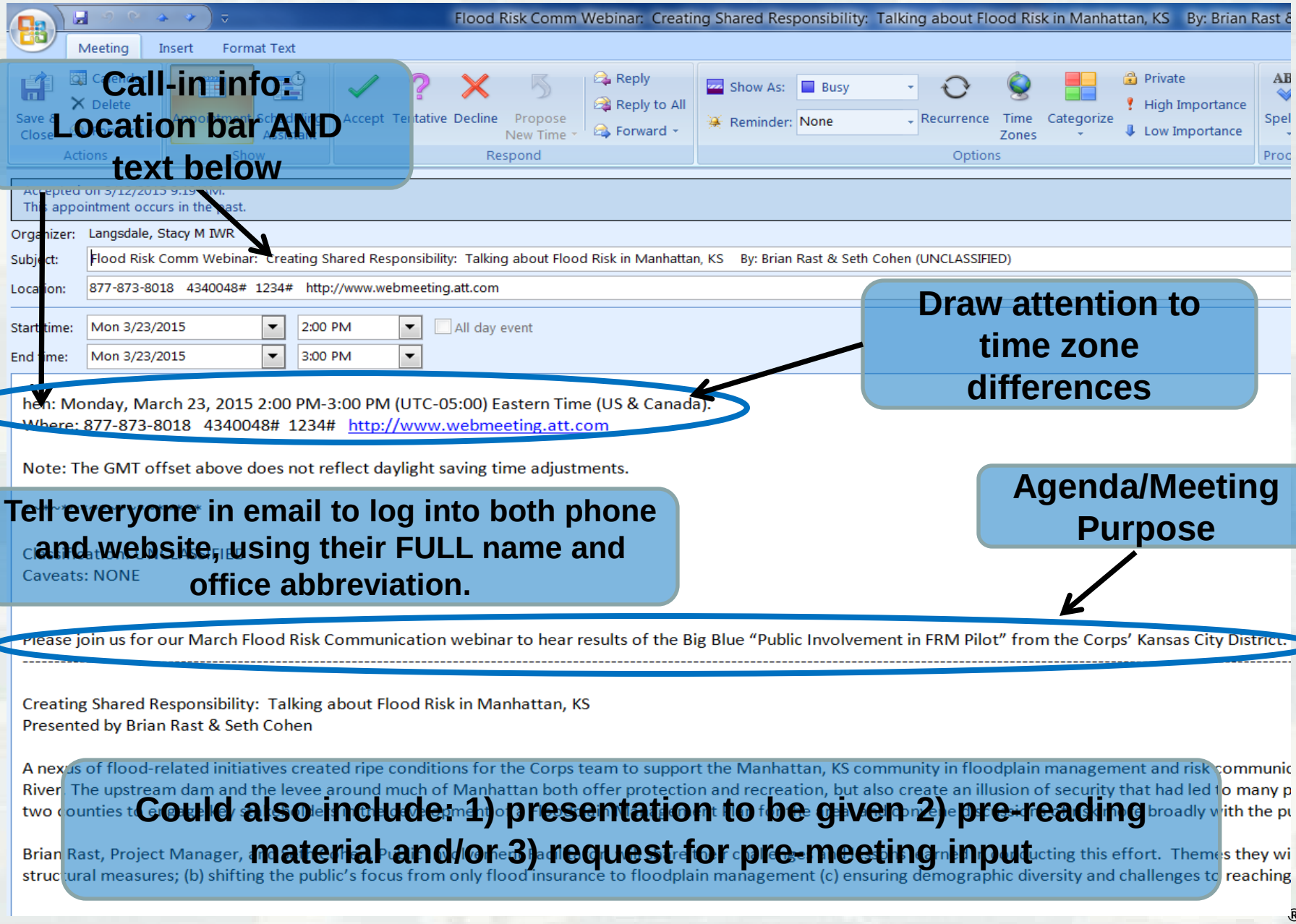
Teleconference

- Record *2
- Participant Count *5
- Entry/Exit Options *3
- Mute all *78
  - *And many more….see user guide at link at end…*

AT&T or DCO Webinar

- Video
- Poll
- Whiteboard
- Chat

Tips: Before the Meeting



Call-in info: Location bar AND text below

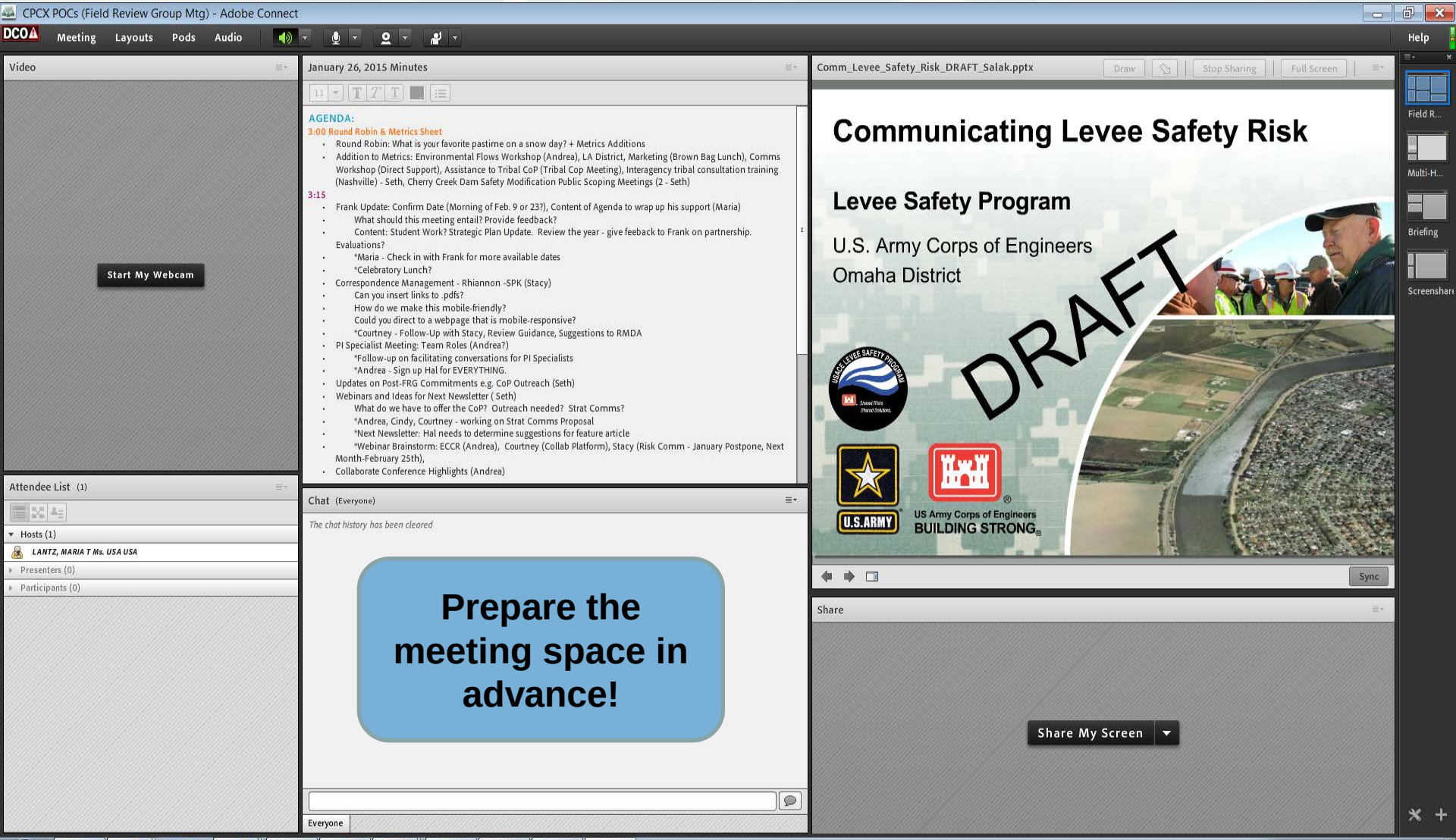
Draw attention to time zone differences

Tell everyone in email to log into both phone and website, using their FULL name and office abbreviation.

Agenda/Meeting Purpose

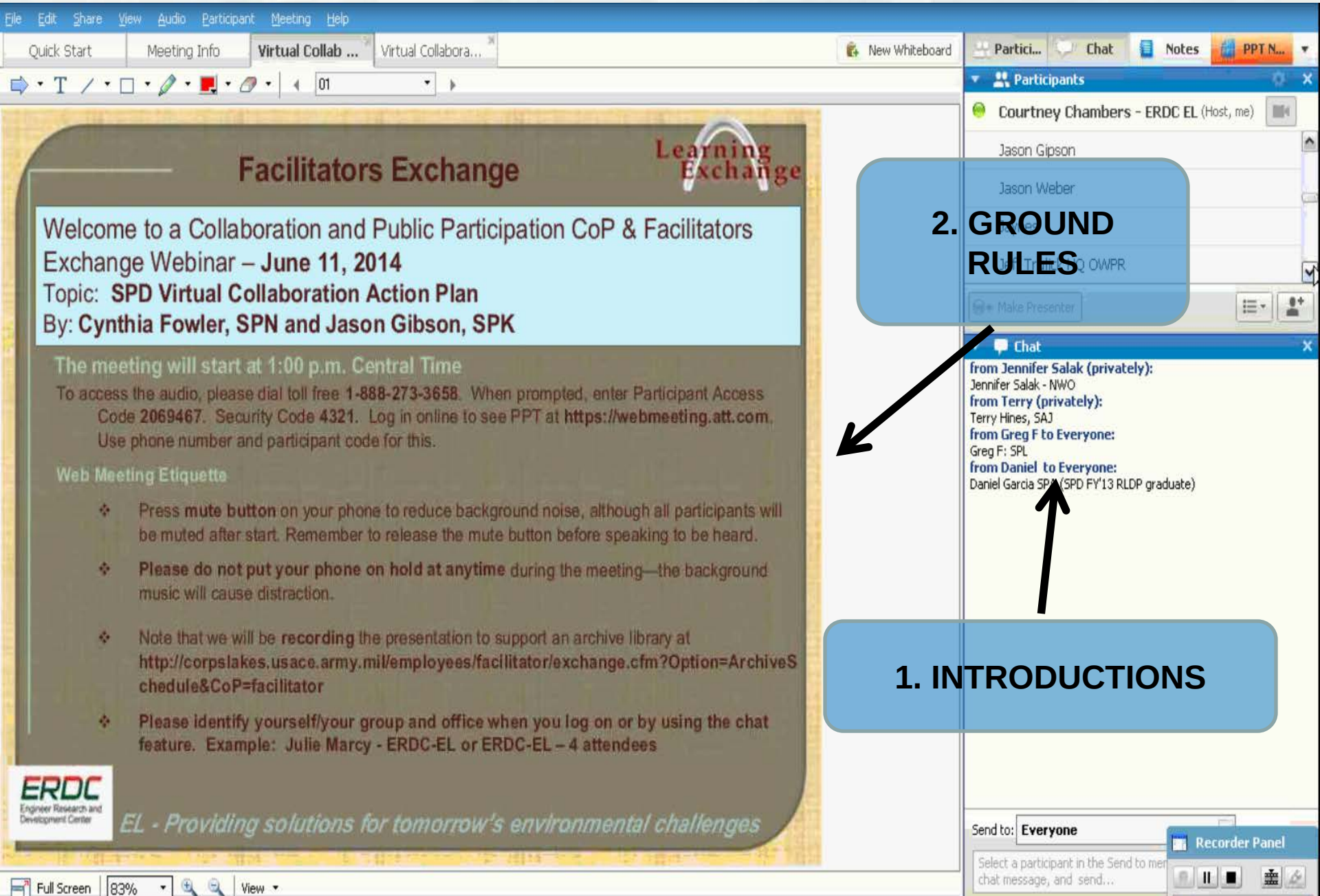
Could also include: 1) presentation to be given 2) pre-reading material and/or 3) request for pre-meeting input

Tips: Before the Meeting



Prepare the meeting space in advance!

Tips: During the Meeting



Tips: During the Meeting

CPCX POCs (Field Review Group Mtg) - Adobe Connect

DCO | Meeting | Layouts | Pods | Audio

Attendee List (1)

- Hosts (1)
  - CARSON, ANDREA L NONE USA CTR
- Presenters (0)
- Participants (0)

January 26, 2015 Minutes

AGENDA:

3:00 Round Robin & Metrics Sheet

- Round Robin: What is your favorite pastime on a snow day? + Metrics Additions
- Addition to Metrics: Environmental Flows Workshop (Andrea), LA District, Marketing (Brown Bag Lunch), Comms Workshop (Direct Support), Assistance to Tribal CoP (Tribal Cop Meeting), Interagency tribal consultation training (Nashville) - Seth, Cherry Creek Dam Safety Modification Public Scoping Meetings (2 - Seth)

3:15

- Frank Update: Confirm Date (Morning of Feb. 9 or 23?), Content of Agenda to wrap up his support (Maria)
- What should this meeting entail? Provide feedback?
- Content: Student Work? Strategic Plan Update. Review the year - give feeback to Frank on partnership. Evaluations?
- *Maria - Check in with Frank for more available dates
- *Celebratory Lunch?
- Correspondence Management - Rhiannon -SPK (Stacy)
- Can you insert links to .pdfs?
- How do we make this mobile-friendly?
- Could you direct to a webpage that is mobile-responsive?
- *Courtney - Follow-Up with Stacy, Review Guidance, Suggestions to RMDA
- PI Specialist Meeting: Team Roles (Andrea?)

3. REVIEW AGENDA

Chat 4 (Everyone)

LANTZ, MARIA T Ms. USA USA: Andrea Carson

Julia B - guest: If there was a PI/PP equivalent of this Talk Nerdy to Me video (http://www.ted.com/talks/melissa_marshall_talk_nerdy_to_me) that would be awesome

Julia B - guest 2: My experience with APAN was that they were super communicative (like at least once per day)

BRUMMETT, BRANDON R Mr. OTHER-GOVT USA 2: Clip from the Office used in our LDP class: https://www.youtube.com/watch?v=O[illegible]K74KO4

3. CHAT BOX for AGENDA ADDITIONS

Video | Stop My Webcam

Where would you like the group dinner?

Prepare | View Votes | Close

Where would you like the group dinner?

- Nearby Lakewood or Golden — 50% (3)
- Downtown — 50% (3)
- No Vote

☑ Broadcast Results

Do these outcomes address your needs?

Multiple Choice | Open

Question: Do these outcomes address your needs?

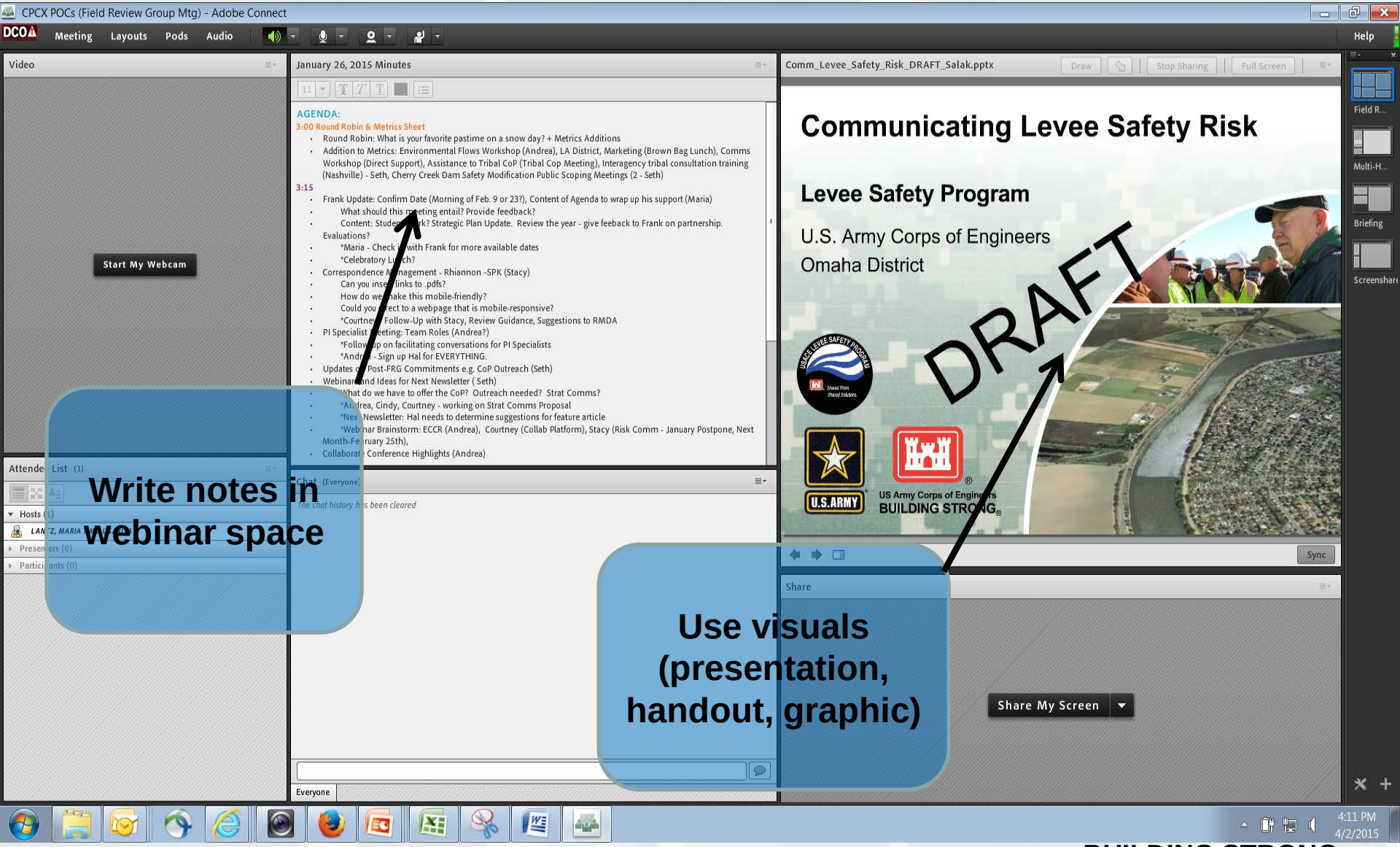
Answers (One per line):
yes
no

Everyone | GREENLEY, COUR...

Tips: Meeting Etiquette

- Stay off mute/mute phone when not speaking
- Identify yourself every time you speak
- Avoid side conversations
- Avoid multi-tasking
- Let the group know if you have to leave early
- Sound control:
  - Ask participants to use headsets
  - Remind to speak into the microphone
- "Beep-in" or raise your virtual hand if you have a comment/question

Tips: Keep People Engaged



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My Webcam

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MULTIPLE CHOICE & CHECK ALL THAT APPLY POLL OPTIONS

DESIGNATE PLACES FOR FEEDBACK

PRIVATE AND GENERAL CHAT OPTIONS

Tips: During the Call

- Summarize due-outs and decisions and make sure everyone agrees & confirms
- Agree on next call time at the end or set up a reoccurring call if appropriate
- Strive to end the call on-time even if you don't get to all agenda items

Tips: After the Call

- Distribute notes – list do-outs and decisions at the top
- Use one document for all calls with most recent call's notes at the top
- Keep the meeting notes and other key documents attached to reoccurring meeting announcement

Summary

An effective meeting involves:

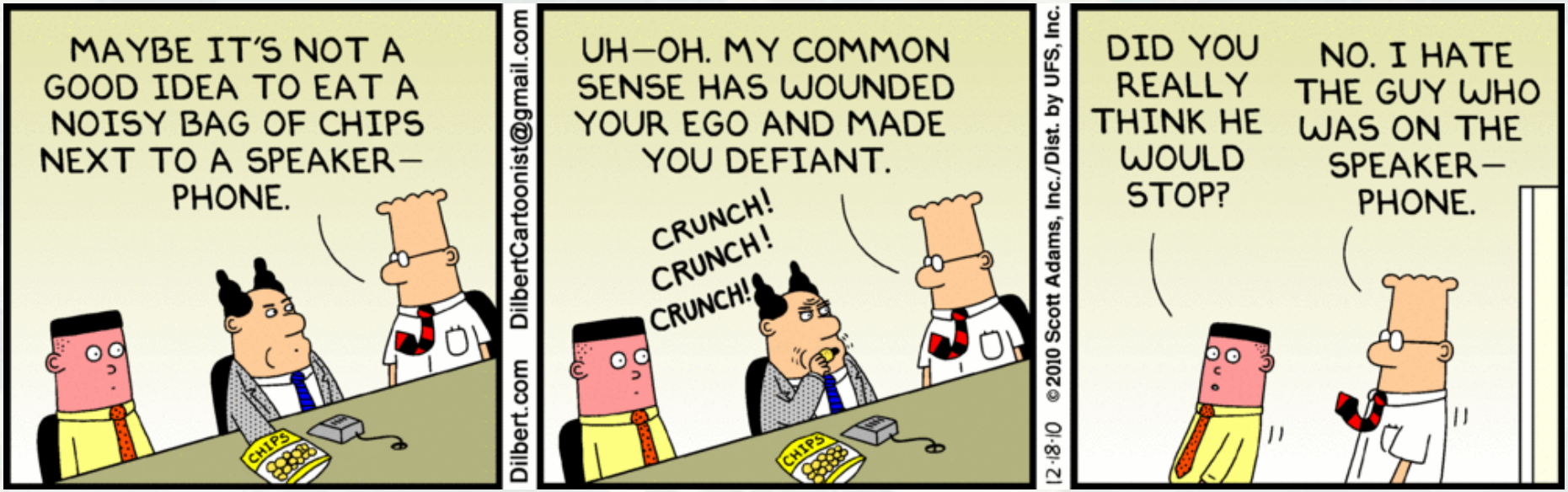
- A solid objective(s),
- A tight agenda,
- Involving meeting participants in the planning, preparation, and execution of the meeting.
- Document & disseminate decisions and actions for follow up.

NO MATTER WHAT THE FORMAT!

Resources

- **Facing Down Your Fears About Facilitating a Virtual Meeting**
  - http://www.facilitate.com/support/facilitator-toolkit/docs/Facing-Fears-Virtual-Meetings.pdf
- **Six Critical Success Factors for Running a Successful Virtual Meeting**
  - http://www.facilitate.com/support/facilitator-toolkit/docs/Six-Critical-Success-Factors-for-Successful-Virtual-Meetings.pdf
- **CoP sharepoint Virtual facilitation and teaming resources**
  - **https://cops.usace.army.mil/sites/CPP/Shared%20Documents/Forms/AllItems.aspx?RootFolder=%2fsites%2fCPP%2fShared%20Documents%2fVirtual%20Teaming%5fFacilitation&FolderCTID=&View=%7b8DF63935%2d777E%2d42E4%2dACF7%2d88DE670E6C96%7d**
- **AT&T Reservationless Service User Guide**
  - https://aceit.usace.army.mil/support/Communications/Documents/ATT%20Audio%20and%20Web%20Meeting/Reservationless%20Conferencing%20User%20Guide.pdf

What Are Your Best Tips?



Virtual Teaming Tools

- Virtual tours
- Conceptual drawings/photos
- Video Vignettes
- Flyovers

Virtual Tour

- Range from simple to complex
  - Photo album with map
  - Power point
  - Similar to Realty sites
- Use to show the existing conditions
  - Can add artist rendering of future with project

Conceptual Drawings

- Rendering of with project condition
- Concept of specific measure or alternative

Vignettes

- Snippets of video that show
  - Study site
  - Representative locations
  - Nature in action

Flyovers

- Flyovers are pre-recorded videos that show the project area
- Google Earth Pro
- Jacksonville District Example

Learning Time!

- Learn how to create a Flyover using Google Earth Pro
- Instructions and Tips posted online as well