How to Have a Successful Online Board Meeting

Jeanne Allen
Facilitator-Consultant-Trainer
Jeanne@JeanneAllenConsulting.com

Tips for Every Board Meeting

1. Embrace the Consent Agenda
2. Schedule important discussion for when the board is fresh
3. No surprises!
4. More prep needed for online; less room for spontaneous

Jeanne Allen Consulting
@jeanneallennc
Jeanne@JeanneAllenConsulting.com

Before the meeting

1. What makes a good board meeting?
2. What makes a bad board meeting?

Jeanne- Trainer, Facilitator, Speaker

1. Kinda new to online meetings, no leading
2. Big time participant & first-time leader of virtual meetings
3. led 1-10 virtual meetings
4. led 10+ virtual meetings

Jeanne Allen
Jeanne@JeanneAllenConsulting.com
Apr 2020
5. Security: Are there security issues?

During the Meeting

1. Connect people
2. Encourage collaborative problem solving
3. Give agenda time to all
4. Kill mute
5. Ban multitasking

ICEBREAKERS

During the Meeting

1. Take a picture of your shoes
2. Take a picture of object on desk
During the Meeting

1. Rotate roles—make sure roles matter
2. Check in with a round robin
3. Use screen sharing
4. Be aware of background noise
5. Turn off alerts

Roles
- Facilitator
- Timekeeper
- Note taker
- Technical support
- Yoda

Good practices—rules of engagement
1. Co-create ground rules
2. Use names
3. Poll the group
4. Facilitator role
5. Be camera ready
6. Create common visual focus
7. No multitasking
8. Supplement with other virtual coms

Decision Making

- 0=No way
- 1=Serious concerns; let’s talk
- 2=Have some issues to talk about
- 3=Neutral
- 4=Really like this idea
- 5=This idea fits our needs best

- 0-2=Lack of consensus
- 3-5=Consensus
Police

Facilitation

Create Ground Rules for How to Facilitate

Hint: Need more, not less

1. Establish a line up to call on people
2. Alphabetical
3. Location
4. Order entering call
5. Random
6. Set time limits for sharing/answering

Facilitation clock technique
What are some quick tips for keeping remote participants engaged?

1. Stick to the agenda & objectives
2. Agenda: fast-paced
3. Avoid presentations, share ideas
4. Vary your voice tone
5. Use interactive mtg tech
6. Ask provocative questions, round robins, fill in the blanks
7. Have "plants" in the group

Tools for Remote Meetings

1. Collaboration
   - Sharing docs (Box, Google), planning, decision making, brainstorming

2. Communication
   - Group chat, video calls, polling, visuals, texting, voice

3. Mtg Platforms
   - Zoom, Skype, Teams, Hangouts, WebEx

4. Nitty Gritty
   - Access, passwords, project mgmt, workflow, security

5. Team building
   - Breakouts, chats, reflecting, sharing, appreciation

6. Misc
   - Icebreakers, facilitator roles, whiteboards

https://www.collaborationsuperpowers.com/tools/
Online Collaboration Possibilities

1. Screen sharing
2. Project task management
3. Video conferencing
4. Team messaging/collaboration
5. Collaborative writing
6. Whiteboarding
7. Mindmapping
8. Instant messaging
9. Text chat
10. Send large files—WeTransfer
11. Files sharing—Dropbox, Box, Google Drive
12. Document sharing
13. Web presenting—Slideshare

Closing thoughts
1. Identify what makes a good meeting
2. Virtual meetings need good facilitation
3. Plan ways to keep people engaged and focused
4. Be ready for tech challenges

What is one idea, technique or tool you can try out between now and next meeting that can help your virtual board meeting be more successful?

Jeanne Allen- Trainer, Facilitator, Speaker

Jeanne Allen Consulting
@jeanneallennc
Jeanne@JeanneAllenConsulting

Board or Staff Retreats, Strategic Planning
Meeting Design and Facilitation, Keynote Speaking