KARIN M. REED AND JOSEPH A. ALLEN

SUDDENLY

VIRTUAL

MAKING **REMOTE** MEETINGS WORK

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WILEY

For our families who allowed us to disappear into our writing to get this book quickly to our readers who are desperately seeking answers in this "Suddenly Virtual" world.

Joe: For Joy, Karen, Rachel, Alice, and Julia

Karin: For Shawn, Hayden, and Jackson

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Preface: The Collision and Convergence of Two Areas of Expertise

I n mid-March 2020, the world of work transformed before our eyes. While essential workers continued to valiantly do their jobs in the face of a global pandemic, the vast majority of corporate offices closed their brick-and-mortar locations and moved to entirely remote operations to protect the lives of their employees and loved ones. Suddenly, so-called knowledge workers were working from home, often in environments that were never designed for this new purpose. Important sales calls were taking place from the back porch. Training was being conducted virtually from dining room tables. Teams were navigating a dispersed workplace through the camera lenses of their home computers, smartphones, and tablets.

It was about a week before the "stay-at-home" orders swept across the United States that Dr. Joseph Allen and Karin Reed crossed paths. They were both working as subject matter experts for Logitech, the market leader in video collaboration tools, but they brought very different experiences and insights to the table.

Joe had been studying workplace meetings as an academic for over a decade, publishing more than 100 articles, book chapters, and books on the topic in academic outlets. He edited two volumes related to meeting science, including *The Cambridge Handbook of Meeting Science* and *Research on Managing Groups and Teams: Managing Meetings in Organizations*. As a recognized thought leader in this area, his work highlights the science-based best practices for

workplace meetings. He provides consulting services for a variety of leaders and organizations toward the optimization of their workplace meetings.

Karin had been teaching on-camera communication skills for almost a decade through her communication training firm, Speaker Dynamics. After an Emmy-award winning career as a broadcast journalist and professional spokesperson, she developed a method-ology to help business professionals be effective communicators when speaking to a camera, be it in the studio or in front of a laptop. Her first book, *On-Camera Coach: Tools and Techniques for Business Professionals in a Video-Driven World*, debuted as a #1 Hot New Release in Business Communications in 2017.

On March 11, 2020, Joe and Karin were asked to bring their expertise to bear as featured panelists for a Logitech webinar titled *Rethinking the Modern Meeting*. Little did they know how much the "modern meeting" would change within weeks, even within days of that early March webinar. The seismic shift would have broad impli-cations for both of them – a veritable playground of new meeting science hypotheses to explore for Joe and an overnight explosion of business for Karin and her team from clients who were clamoring to get comfortable communicating by webcam alone.

The shift to virtual meetings was sudden and often traumatic for businesses across all industries. At first, rather than focusing on what would work best, businesses simply focused on what worked *now*. And what worked now was closing up the office and being suddenly virtual in nearly every meeting, often without the tools, the training, or the expertise to optimize the new "kitchen table" office. As weeks turned into months, though, businesses started to be more purposeful in the tools they used and the approach they took but still relied mostly upon gut feeling and perhaps trial and error.

All the while, Joe was researching and watching the evolution in real time and gathering the data that could inform decisions in the

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days, months, and years ahead. The move to remote work was having a profound and potent effect on our meetings and even our home life, and the findings were fascinating. In the meantime, Karin was delivering effective virtual communication training to thousands of people struggling to speak through that little lens embedded in their laptop or phone, when they wanted desperately to speak face-to-face but could not.

Months after that initial webinar on the modern meeting, Joe and Karin reconnected and realized their areas of expertise were powerfully colliding at a common pain point: making remote meetings work. Both Karin and Joe had been inundated with requests to help. While they felt truly fortunate to be able to answer many of those requests through training and consulting work, they knew they needed a way to amplify the message.

What if they brought together Joe's data-driven insights and Karin's real-world experiences to address a very pressing need the world over? The Meeting Scientist and the On-Camera Coach join forces again...ergo, *Suddenly Virtual: Making Remote Meetings Work.*

The Purpose of This Book

With so many relatively new virtual workers engaging in remote work and holding virtual meetings, science-based help to optimize the virtual meeting is not only needed but has also been fervently requested by those who are struggling to find a way to make these meetings work. Because there is so much uncertainty across the business landscape today, Joe and Karin hope this book can be a resource for as many people as possible in navigating virtual meetings where video is at their core.

With two very different but complementary skill sets, there are certain sections where Joe will take the lead and other sections where Karin will, as they each delve deeply into their respective

areas of expertise. That's why in Sections 1–3, we will identify each chapter by labeling them "The Meeting Scientist Perspective" and "The On-Camera Coach Perspective" accordingly as they highlight new research insights springing from the rapid and exponential adoption of virtual meeting technology. However, their expertise fully converges for Sections 4–5 where they will speak in a unified voice as they discuss the problems, challenges, and pitfalls of meeting in this new modality with a look ahead at what the future of meetings may hold. Most important, throughout the book, they provide practical and actionable best practices that are backed by meeting research – practices that lead to more productive and effective virtual meetings that impact the bottom line.

How to Use This Book

This book is called a practical guide for a reason. It is designed to be a workbook that you can use to adopt and adapt your own ways of conducting business virtually. For that reason, they have included several tools for you to leverage that will help you build the capabilities of your own organization.

Checklists: Growth requires self-reflection. That's why they have provided checklists within and at the end of several chapters that you can use as an assessment tool of where you are now or a reminder of where you would like to be.

Try This: We often learn by doing, so in order to allow key takeaways to stick, they have included a few exercises for applying the techniques in your own environment and flexing your new skills.

Case Studies: This book is designed to provide you best practices steeped in solid science, but in order to see science come to life, it can be helpful to take a look at real-world examples. Starting with Section four, you will find case studies to illustrate how organizations across a variety of industries have adapted to the world of remote work.

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They share what worked, what did not, and how they are charting their path to success in our suddenly virtual work environment.

Chapter Takeaways: Each chapter ends with a list of key takeaways to help you distill the content into digestible nuggets. Hopefully, you won't just read the book and place it on a shelf to gather dust. Rather, the hope is it becomes a frequent source of inspiration for many remote meetings to come. The bulleted lists, highlighting the essential points, are provided to serve as a quick reference.

Reflection Activity: In the final chapter, they will introduce the Adaptive Improvement Model (AIM) framework, which encourages you to consider things that you should *continue* doing, things you should *stop* doing, and things you should *start* doing. With your checklists and reflections from the book in hand, you can use the provided worksheet that will allow you to celebrate the things you are doing well while setting goals on things to do in the future. Thus, the book comes alive in your work life as you experiment with the practices and procedures discussed herein.

Ultimately, this book seeks to be a definitive guide for businesses looking to make their meetings as effective as possible in the ever-evolving "new normal" by leveraging the insights from some of the foremost thought leaders in meeting science and on-camera communication. Most businesses have settled into virtual meetings for the foreseeable future, and the decisions made in this arena will impact operations both now and in the times to come. The hope is the right decisions will be easier to make after you finish reading this book.

Acknowledgments

Our New Virtual Reality – A Suddenly Remote Workforce

T hink back to October 2019. Now imagine what your work life looked like at that time. Maybe you hated your long commute and tried not to tally up the annual hours spent getting to and from the office. Perhaps you actually enjoyed flying to meet with potential customers in far-flung places and taking in the sights of an unexplored city. Or were you like so many of us who planned to revolt if we had to sit through one more pointless meeting in that cramped conference room, with coworkers who all watched the clock eat up time that could be spent "getting stuff done"? Oh, what a difference just a few months can make.

In this section, we reflect on the new reality introduced to the world of business by the COVID-19 pandemic. We begin with Joe, who describes what happened to work and more specifically, to the work meeting (Chapter 1). We then hear from Karin, who focuses on the hopeful truth that videoconferencing is a viable substitute for face-to-face meetings. She delves into its rapid adoption across

corporate America as well as the value that video communication can bring when the world becomes remote (Chapter 2).

QUICK WARNING: If you flipped right past the preface, we would suggest you flip back and give it a read. Not only does it explain why a meeting scientist and an on-camera coach are collaborators in the first place, but it also tells you how to get the most out of this book by laying out the structure, the tools, and the opportunity to make it a working document. Don't worry, we'll wait.

What Happened to Meetings?

The Meeting Scientist Perspective

P erhaps an important question to ask is "When did the world change?" Certainly, the world changed quickly, and many workers were either without work or found themselves in a dramatically different work environment. While the change was nearly instantaneous for some, others experienced a more gradual progression as the world tried to navigate the uncharted territory of a global pandemic. The facts on the ground shifted – not just day by day, but also hour by hour. A universal sense of uncertainty bled into every aspect of our lives.

The business world sought to adapt to the changes, but in those early days, ever-changing information meant that plans were scrapped almost as soon as they were written.

In this chapter, we will explore:

- The sequence of events that led to much of the world of work going remote.
- The rise of the virtual meeting.
- How businesses scrambled to adapt to the new virtual reality.

How Did We Get Here?

When did you first really pay attention to what was happening with COVID-19? From your current vantage point, you may find it hard to believe that most of us did not give it a whole lot of thought when it first reared its ugly head in China. Few of us could have imagined then how it would soon turn our world upside down. However, you probably do remember a watershed moment which signaled a shift in mindset. Maybe it was the cancellation of the NBA season or the closure of your college campuses? That's when we were suddenly glued to the TV and felt like we could not keep up with the news or the changes swiftly overtaking every aspect of our lives. The pandemic was a force to be reckoned with, and no one was going to be left unimpacted.

To put what happened to work and workplace meetings into proper context, here's a quick timeline of events.

Timeline of Events from the COVID-19 Pandemic (Kantis, Kiernan, and Bardi 2020)

December 8, 2019	A patient in the city of Wuhan sought medical help for pneumonia-like symptoms.
January 3, 2020	China officially notifies the WHO of an outbreak.
January 21, 2020	United States confirms its first case in Washington state, a man who traveled to the Wuhan area.
January 23, 2020	WHO meets again and decides not to declare the outbreak a Public Health Emergency of International Concern (PHEIC).

January 24, 2020	Nepal, Vietnam, France, and Malaysia confirm their first cases. Wuhan construction crews are working on two hospitals to treat patients of the outbreak: the first is to be completed on February 3 and the second in early February.
February 4, 2020	The U.S. Food and Drug Administration issues an emergency use authorization for CDC's diagnostic test. President Trump pledges to safeguard Americans from the coronavirus in his State of the Union address.
February 7, 2020	Total Cases Confirmed Globally: 31,484.
February 10, 2020	The United Kingdom declares that the coronavirus constitutes a serious and imminent threat to public health. The Trump administration releases a budget proposal for FY21 that would sharply cut funding for WHO and global health funding.
February 13, 2020	U.S. CDC Director says that the coronavirus will likely become a community virus and remain beyond this season.
February 15, 2020	The United States announces plans to evacuate nearly four hundred Americans quarantined on the Diamond Princess cruise ship; passengers who test positive for COVID-19 will be treated in Japan.
February 25, 2020	U.S. CDC warns that spread to the United States is likely and that people should prepare.
February 29, 2020	Australia reports its first death, an evacuee from the Diamond Princess. The United States reports its first death, a man in his fifties with an underlying health condition. Washington state declares a state of emergency.
March 7, 2020	Roughly 5,861 coronavirus tests are completed by CDC and public health labs in the United States. New York declares a state of emergency.

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March 11, 2020	WHO declares the coronavirus outbreak a pandemic. Washington, D.C., declares a state of emergency. United States announces level 3 travel advisory and suspends entry to all foreign nationals traveling from China, Iran, and certain European countries at any point during the 14 days prior to their scheduled travel to the U.S. NBA suspends their season. Italy closes all shops and venues across the country. The United Nations reports that about 20% of students are out of school globally as a result of the pandemic.
March 12, 2020	U.S. stocks record their worst day since 1987. New York City declares a state of emergency. Ohio closes all public schools until at least April 3, 2020. France closes all schools. Virginia declares a state of emergency.

As of the writing of this book, more than 81 million people have been infected and over 1.8 million have died from the pandemic worldwide. Cases occurred in 188 countries, with many of them seeing their citizens dying from this disease.

The public health response has varied from country to country, with some shutting down immediately and asking citizens to stay home for weeks (e.g. South Korea) and others simply waiting for herd immunity to be achieved (e.g. Sweden). In the United States and many other countries the world over, the pandemic shut down the economy, the schools, and our favorite restaurants. Essential workers (e.g. some in manufacturing and many in grocery stores, farms, meat-packing, and so on) carried on in their work to feed the population, and so also carried the initial brunt of the burden of the disease.

As this happened, teachers learned how to go fully online, parents learned how to teach kids from home, and many organizations required their employees to work remotely. The kitchen table,

bedroom, back porch, or home office became many people's only office. Demand for computers, webcams, headsets, desks, standing desks, monitors, and even "desk treadmills" skyrocketed, making some firms scramble to deal with supply, and with some individuals waiting for weeks for key tools they needed to go fully remote.

For years, organizations danced around the work-from-home issue. Some workers who sought the flexibility of a work-from-home life were denied time and again. Flexible work schedules were a niche area in academic research and even more niche in the actual workplace. Then, COVID-19 hit, and everyone was "suddenly virtual." The organizational sciences refer to this event as an equilibrium shift. Although the world had its challenges in October 2019, the economies were humming along at what might be called equilibrium. Then, a sudden and deep shock to the system occurred and fully unfolded over the following few months. In psychology, key events in one's life might be considered flashbulb moments, such as, in the past, "Where were you when Neil Armstrong landed on the moon?" or "Where were you on 9/11?" Now, we have, "Where were you during the COVID-19 pandemic?"

Like so many knowledge workers, Karin's office became a time capsule of March 2020, with sticky notes on the wall reflecting to-do lists for projects that were either scrapped or put on hold until a later date. One particularly poignant email from that time from Karin to a client read in part, "Let's reschedule the workshop for June. Surely things will be back to normal by then." Hindsight, of course, reveals the level of denial or even folly in those words. Even at the end of 2020, attempting to reschedule large group trainings seems ill-conceived. Luckily, Karin already had been delivering a third of her training virtually for years, but with COVID-19, that third became 100% of her business practically overnight.

Big events such as these flashbulb moments or lengthy world events (e.g. World War I, World War II, etc.) usually mean big changes. And these big changes usually have a lasting effect. For example, following the events of September 11, 2001, in the United States, the experience of getting on a plane in the U.S. changed forever with long lines for screening passengers, waiting areas forbidden for all but those who held tickets, and shoes removed while screening, among other things. Changes like these sometimes last in the name of safety, while others may remain out of convenience or cost savings. If you are in commercial real estate, consider this your warning. Remote work and the virtual office are big changes caused by a big event that will not be going away.

What Happened to Work?

Work changed for many. With the noted exceptions of many essential workers, the so-called "knowledge workers" were required to work differently. Instead of commutes and coffee at the corner shop, many began to roll out of bed, dress for success on the top half, make some passable coffee in a home brewing machine, and flip the laptop open for a long day of work from home. We would write our reports, crunch our numbers, take out the garbage, answer some email, fix our child's phone, deal with some urgent texts from a colleague, walk the dog, and log out an hour or two later than we did when we worked in the office. In fact, the average U.S. worker increased their hours worked per day by as much as three hours (Davis and Green 2020).

In this new work-from-home environment, we found ourselves no longer meeting with our colleagues face-to-face. The face-to-face meeting was banished and essentially vanished. Our video cameras came on, our cats started making cameos in our meetings, our children were now understood interruptions, and our pants became optional (hopefully unbeknownst to our colleagues). And with all of these elements of our new normal . . . the rise of the virtual meeting.

What Happened to Meetings?

Just prior to the pandemic in October 2019, Joe had the fortunate chance to collect data concerning virtual meetings with his colleagues at the University of Nebraska at Omaha. Although the data was limited to U.S. workers, its meaning increased dramatically as 2020 unfolded. In October 2019, nearly 80% of meetings were face-to-face, with less than 4% held over video. A little more than 13% of meetings were classified as hybrid, which refers to meetings where a couple of people may be in one conference room talking to folks in another conference room in another city, or country, via telephone or video conference. Thus, the vast majority of us essentially met face-to-face, be it in our office, our conference rooms, at our favorite coffee shops, restaurants, or even bars. As the bar graph below shows, things changed both dramatically and quickly.

What Happened to Meetings?
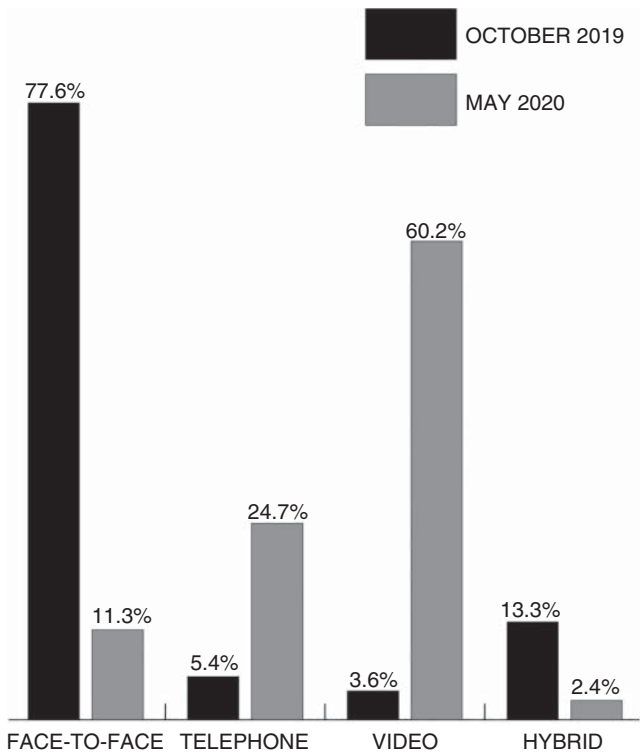
After the onset of the pandemic, meetings became suddenly virtual. Workers experienced a 60% jump of meetings on video – almost 20 times the rate from before COVID-19. Telephone meetings jumped to nearly 25% of our meetings while face-to-face meetings were one-seventh its former total. In other words, we stopped meeting face-to-face, except in certain occupations deemed essential such as medical doctors, nurses, and other healthcare providers. However, even healthcare saw a rapid rise in telehealth. According to a survey by Sermo, an online physician network, 85% of physicians had adopted telehealth (typically video visits with patients), and 60% said they planned to continue using telehealth even after the pandemic is in the past (Wicklund 2020).

Unsurprisingly, videoconferencing software boomed. Total video calls in Microsoft Teams experienced 1000% growth in March 2020 alone (Spataro 2020). Zoom, Webex, Google groups, BlueJeans, Skype, and other software saw similar or even greater growth during that same time. The default camera in many people's laptops went from being covered with tape for "privacy" to being a window into our homes and the homes of our colleagues, as videoconferencing became the main way for us to meet and collaborate during a pandemic.

Large meetings and conferences shifted to virtual as well, sometimes with lightning-fast response times. Artificial Intelligence (AI) company Nuance took its global research and development (R&D) conference online in a matter of days using a Microsoft Teams channel and a PDF agenda with links to session events. Hundreds of attendees were able to benefit from the wealth of cutting-edge information shared through a conference that cost Nuance almost nothing to put on. The previous year's event cost Nuance approximately $700,000 (Spataro 2020). CompTIA, a nonprofit trade association in the IT industry, made the pivot to all virtual. Ten days prior to a long-planned, in-person conference in Chicago, they decided to flip

the switch and take it all online. The painstakingly prepared agenda, chock-full of working group meetings, speakers, sessions, and even a St. Patrick's Day celebration along the dyed-green Chicago River, was reworked for the new platform. And it worked – the virtual event attracted five times more people than were expected to attend the Chicago event, and CompTIA called the industry response to the conference "overwhelmingly positive" (Campbell 2020). The trend continued for months to come. Joe's professional conference, the Society for Industrial and Organizational Psychology (SIOP) conference, was online in June 2020, and the Interdisciplinary Network for Group Researchers (INGRoup) was online in October 2020.

Conclusion

Given our observations and the trends just identified, how we meet on a regular basis has changed, perhaps for good. Sure, COVID-19 will not last forever, but the tools used to collaborate during this time will continue to be available and a viable option for working remotely, working from home, and so on. Thus, in the following chapter, we acknowledge the truth: videoconferencing is a viable alternative for face-to-face meetings – and it works.

Chapter Takeaways

- The pandemic changed how many people work and how many people meet to collaborate and accomplish their jobs.
- The format for meetings switched from face-to-face being the dominant form to the virtual meeting, primarily video-based interaction.
- The short-term move to remote meetings will likely be part of a long-term impact – the way we meet will never be the same.

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