

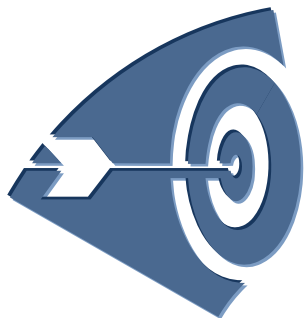
LESSON 5 TEAM EXERCISE – EAST TEAM

EXERCISE:

- Generate a template or protocol that solves the issues either for your project or for one of those projects that you critiqued in the previous threaded discussion. You and your team members may select any that you perceive as having high value.
- If it's a process or protocol, be sure to spell out the specific 1-2-3 steps that participants will pursue. Clearly define the objective of the template or protocol, then create a dummy version.

TEAM EAST RESPONSE:

We agree on creating a protocol that will help managing virtual meeting. Meeting virtually is changing the way we run businesses every day, this exposure requires the use of web-based collaboration tools that will directly impact the quality of the meetings. We all as project managers have been working under virtualized environments where meeting attendees may be dispersed around the world.



Acme Corp

Virtual Meetings Protocol – Version 1.0

Data Classification: Public

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OBJECTIVE

In our organization all Project Managers have been exposed to virtual meetings where one or more participants are working at of our branches either domestic or international, clients connecting from within their organizations or third party entities such as vendors, consultants or stakeholders in general. Orchestrating a teleconference meeting requires from our Project Managers a new set of skills. To help in the process, ACME has developed this protocol based on professional expertise and feedback from our most knowledgeable staff. The purpose is to assist Project Managers (Facilitators) across our company to effectively plan and execute virtual meetings.

PROTOCOL

1. AVAILABILITY OF TECHNOLOGY AND AGENDA

All participants must ensure they have the right software needed for the virtual meeting at least a day in advance. If possible, participants must ensure they are familiar with the particular tool's features. Facilitators have the responsibility to ensure that all meeting participants have the necessary tools. At ACME Corporation we use Windows Live Conferencing Services for all our virtual meeting needs. The Facilitator will need to make sure all participants are minimally familiar with this tool and distribute the user guide among participants in advance. The Facilitator is to circulate a meeting agenda one day in advance of the meeting

2. LOGGING IN TO THE VIRTUAL CONFERENCE ROOM

All participants must login a few minutes early. Facilitator must be logged in at least 5 minutes in advance.

3. PARTICIPANTS PRESENTATION

Participants must enter name, title and organization when meeting with external/unfamiliar participants. If the tool allows participant status flags, use them.

4. MEETING RULES

Facilitator must clarify how questions are to be handled – when and how to ask questions. Participants are responsible for effective participation and the Facilitator is responsible enforcing the rules of effective participation – one discussion at a time, ensure everyone gets a chance to state their point and keep discussions on-point. Organization will hold employees accountable for effective participation in virtual meetings.

5. MEETING INTRODUCTION

The project manager has the responsibility of clearly stating the meeting objectives to the entire team. The project manager has also the responsibility to ensure all the participants are aware of the meeting rules and specific details related to the meeting subject.

6. NON-NATIVE ENGLISH SPEAKERS

Working with our clients will often bring ESL (English as a Second Language) participants. Make sure to identify them and be conscious of their communication limitations. Ensure all communication has been clear and understood by all participants.

7. PARTICIPANTS INVOLVEMENT

All participants must state their name with their comment or question. Participants must keep background noise to a minimum – avoid moving things near the phone or the phone itself, mute when possible (remember to un-mute when

speaking). Participants must not put their calls on hold. Participants must avoid/resist multi-tasking. If you must multitask, make sure you don't lose the thread of the meeting. When asking questions, participants must state whom it is addressed to.

8. DECISION MAKING

The facilitator must request responses from each participant when polling, especially for decisions.

9. LEAVING PARTICIPANTS

Participants who need to leave the meeting early notify the facilitator in advance that they will be doing so. Participants must not interrupt an ongoing discussion to announce departure. If dropping off unexpectedly, participants send a message to the facilitator prior to dropping off.

10. MEETING CONCLUSION

At the conclusion of the meeting, facilitator must poll all participants for any unaddressed items. This information needs to be clearly collected and documented.

CHECKLIST

PRE-MEETING

- Are we sure that everyone has the required technology available? **Yes** ☐ **No** ☐
- Have been all the participants been invited and confirmed their participation? **Yes** ☐ **No** ☐
- Will be there no English speakers participating? Have you considered this? **Yes** ☐ **No** ☐
- Have you reviewed the Virtual Meeting Protocol? **Yes** ☐ **No** ☐
- Has all the information for the meeting been distributed? **Yes** ☐ **No** ☐

MEETING INITIATION

- Have you clearly disclosed the meeting objectives? **Yes** ☐ **No** ☐
- Have you introduced all participants? **Yes** ☐ **No** ☐
- Have you verified everybody can access the supporting technology? **Yes** ☐ **No** ☐
- Have you made clear the meeting rules of behavior? **Yes** ☐ **No** ☐

POST-MEETING

- Have you sent the meeting summary and update to all participants? **Yes** ☐ **No** ☐
- Please write below any issues that you consider should be updated on this Protocol/Checklist

Meeting Title

Meeting Date and Time.....

1.
2.
3.
4.
5.