

KARIN M. REED AND JOSEPH A. ALLEN

SUDDENLY



VIRTUAL

MAKING **REMOTE** MEETINGS WORK

Preface: The Collision and Convergence of Two Areas of Expertise

In 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 methodology 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 implications 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

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 take-aways 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.

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.

Praise for

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"This book is a gift to meeting leaders, chock full of thoughtful and critical insights. I strongly recommend it to all those looking to flourish in the virtual meeting world."

—**Steven Rogelberg, PhD**, Chancellor's Professor, UNC Charlotte; author, *The Surprising Science of Meeting: Leading Your Team to Peak Performance*

"Meetings matter, and virtual meetings matter more than ever. Karin and Joe do a fantastic job of providing evidence-based best practices for making your virtual meetings more effective, engaging, and even enjoyable."

—**Matt Abrahams**, Lecturer, Stanford GSB; Co-founder, Bold Echo LLC; author, *Speaking Up without Freaking Out*

"Looking for ways to make your virtual meetings better? This book delivers, with practical advice—backed by solid science—to help you inspire your team, engage better with your customers, and achieve your most important business goals."

—**Dorie Clark**, author, *Reinventing You*; Executive Education faculty, Duke University, Fuqua School of Business

"Karin and Joe strike the right balance of science and practice. *Suddenly Virtual* is a must-read for anyone doing remote work."

—**Matthew Pollard**, bestselling author, *The Introvert's Edge* series

"Virtual meetings are here to stay. Not only does this book offer practical evidenced-based ways to make your virtual meetings more effective, its human-centric approach puts the heart and purpose back into why we convene."

—**Sanyin Siang**, author, *The Launch Book*; CEO, coach, and advisor

"Karin and Joe do the world of virtual meetings a great service by highlighting the nuanced skills needed to make them work and how they are fundamentally different from in person meetings. Keeping quality conversations, team connection, and decision making intact takes more than just pointing the camera in the right direction. Virtual meetings are now a way of life, so make this book part of yours."

—**Ron Carucci**, Managing Partner, Navalent; bestselling author, *To Be Honest: Lead with the Power of Truth, Justice, and Purpose*

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