



# Technology Etiquettes



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Once you have used the tools in our “choosing the right technology for the task” e-learning module, the next step is to make sure you are using these technologies effectively.

There are two steps to this

## 1. Get trained in the technologies you use every day

Normally only a very small percentage of people have ever been trained in the communication tools they use every day – have you been trained how to use tools like Excel, Outlook or Word or whichever specific tools you use?

We are not saying you need to go to a long training course to use a basic word processor. But there are probably functions that you don't know about and therefore don't use that would save you time and improve your use of the tool.

Our experience is that there is always a productivity gain to be had by learning to use these common tools properly.

## 2. Agree your etiquette

Second – agree the etiquettes or ways you will communicate using the technology. To help you do this we produced some guidelines from our own experience of using

- > Virtual meeting
- > Videoconference
- > Web meeting
- > Audio conference
- > Instant Messenger
- > Email

We suggest you discuss these in your meetings and agree how your particular team will operate these guidelines. You will need to adapt these to your particular communication task and the needs of your team.



# Technology Etiquettes

## Virtual meetings



### What is it good for

- Quick, low cost communication, to groups in similar time zones
- Sharing of information of common interest that cannot be shared by text
- Brief discussions on key topics

### Disadvantages

- Large numbers of participants can limit contributions and lead to a series of monologues
- People are often not paying attention and “multitasking” which leads to lower quality participation



# Technology Etiquettes *continued*

## Our top tips for virtual meetings

### Before the meeting



1) Encourage preparation—send expected outcomes, a clear, short agenda, applicable background reading and key visuals in advance



2) Ensure participants are in a quiet environment or have headsets



3) Limit number of people on the call to essential participants

### During the meeting



1) Nominate a facilitator to control the agenda and manage the wrap-up



2) Nominate a separate scribe / note taker



3) Begin with introductions and roll call, people joining or leaving during the call must let others know



4) Allow some “social” time at the start as callers join the audio conference and say hello



5) Put time limits on individual contributions, items and the meeting as a whole



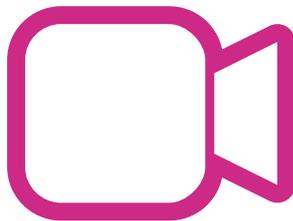
6) Address queries to specific people by name, do a roll call on important decisions and points of understanding



# Technology Etiquettes *continued*

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## Video conferences



### What is it good for

- Interactions requiring face to face contact— interviews, negotiations, feedback, and other sensitive issues where you cannot get face to face
- Occasional face to face contact to help maintain relationships and trust with colleagues

### Disadvantages

- Can be difficult and expensive to organize
- With larger groups the advantages of eye-contact and facial expressions can be harder to see
- Older technologies can introduce lag and other technical issues

### Video conference activity

The meeting rules that work best for your particular mix of personalities, business style and cultures may be different. Ask yourself the process question at the end of your next video-conference – what worked, what didn't, what should we do differently next time. Keep a note of your meeting rules – you will continuously evolve the best rules for your particular video meeting



# Technology Etiquettes *continued*

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## Our top tips for video conferences

### Before the meeting

- 1.** Learn the video conferencing system
- 2.** Structure each meeting with well-defined outputs, a focused agenda & rules and breaks for longer meetings
- 3.** Distribute invites and supporting documentation well in advance
- 4.** Identify a facilitator in each location who should check in advance that – equipment is working, and have back-up local telephone numbers
- 5.** Plan methods for encouraging interactivity—see web meeting guidelines. Maximum 4 participants per location if possible

### During the meeting

- 1.** Just like a face-to-face meeting, some small talk to “break the ice” is useful
- 2.** Open with introductions (all sites), a review of agenda highlights, and any meeting rules
- 3.** Encourage everyone’s participation and ask opinions periodically. Use names to direct questions & responses
- 4.** Build in changes of pace, variety of format
- 5.** Ask for agreement and do not assume that silence equals agreement
- 6.** Maintain eye contact with the camera. Treat the video camera as one of the participants in the meeting. Stay engaged and show interest, this is not TV
- 7.** Limit side conversations, coughing into the microphone, rustling of paper, and so on (to minimize sound system problems)
- 8.** Only use large visuals, adapt visuals to the shape of the monitor and limitations of technology
- 9.** Speak in a strong, clear voice
- 10.** Stick to the agenda, conclude and summarize each item and decision before moving on, do not let discussions drag on
- 11.** Finish on time or early, especially if your technology cuts you off on time
- 12.** Ensure actions, notes, minutes or recordings where appropriate are distributed quickly



# Technology Etiquettes *continued*

## Web meetings



What is it good for	Disadvantages
<ul style="list-style-type: none"><li>• Replacing face to face presentations and meetings at lower cost</li><li>• Short presentations</li><li>• Collaborative working in small groups on common issues or documents</li></ul>	<ul style="list-style-type: none"><li>• Often lacks participation and become one-way and boring</li><li>• Long web meetings can make it hard to focus and concentrate</li><li>• Participants are often “multitasking” and not paying attention unless the content and interaction are of high quality and relevant</li></ul>

### Web meetings activity

Download our free Podcast on ‘Dismal meeting and surprisingly useful coffee breaks’ for more on the fundamentals of planning for more participative meetings. <http://www.global-integration.com/blog/podcast-episode-2-dismal-meetings-surprisingly-useful-coffee-breaks.html>

The meeting rules that work best for your particular mix of personalities, business style and cultures may be different. Ask yourself the process question at the end of your next web meeting – what worked, what didn’t, what should we do differently next time. Keep a note of your meeting rules – you will continuously evolve the best rules for your particular web meeting.



# Technology Etiquettes *continued*

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## Our top tips for web meetings

- 1.** Learn the basic technology – most suppliers of these technologies, and many companies offer short (usually free) online seminars where you can learn the tool in 30-40 minutes – it is time well spent
- 2.** Forget the technology – start by planning the participant experience. How is it relevant to them, how can they use the material, what you want them to know, do or feel as a result of the Web Meeting session
- 3.** Compelling content – what materials (slides, downloads and other resources) do you need to create this audience experience? Planning is absolutely essential – it is hard to be very spontaneous with materials in Web Meeting without losing the attention of the participants; you need to think it through in advance, prepare and upload the materials
- 4.** Think more about participants and design for interaction – how will they be involved? When we focus on content we tend to concentrate on what the presenter will do, but great meetings are ones where the whole team participates. In Web Meeting the participants can chat, write, share whiteboards, web pages and applications, vote, ask questions etc... but only if the meeting leader provides the opportunity
- 5.** Allow participants to create materials, add comments, complete templates etc... rather than expect them to just passively consume materials you created
- 6.** Set expectations of active participation early – if you present for an hour and then ask for questions, you have trained participants to be passive and silent. Get them doing something quickly and regularly – learning some basic Web Meeting functionality like trying out a poll or changing their online status can be enough to begin. Keep building in chances to interact at regular intervals



## Technology Etiquettes *continued*

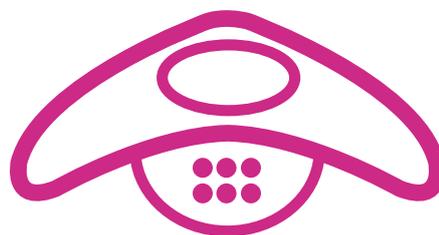
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- 7.** Keep sessions short—take breaks if the meeting lasts more than an hour with clear rules (and consequences) regarding prompt return from the breaks
- 8.** Use small group discussions. To change pace and improve interaction, try having people attend in small groups, 3 to 6 people in each location. Take breaks to allow these subgroups to discuss or complete local assignments then bring all the subgroups back online to share findings
- 9.** Interactivity is key. In a face to face meeting people will (usually) try to look interested even when their mind is wandering. In on-line meetings, participants will just do something else if you lose their attention. Design for interactivity
- 10.** Get into the planning habit. Running really successful Web Meeting sessions requires you to think through the process you will follow and to plan for interactivity—not just think about your content. This is a great lesson and one we should apply to our face to face meetings as well



# Technology Etiquettes *continued*

## Audio conferences



### What is it good for

- Quick, low cost communication, to groups in similar time zones
- Sharing of information of common interest that cannot be shared by text
- Brief discussions on key topics

### Disadvantages

- Large numbers of participants can limit contributions and lead to a series of monologues
- People are often not paying attention and “multitasking” which leads to lower quality participation

### Audio conference activity

The meeting rules that work best for your particular mix of personalities, business style and cultures may be different. Ask yourself the process question at the end of your next audio-conference – what worked, what didn't, what should we do differently next time. Keep a note of your meeting rules – you will continuously evolve the best rules for your particular audio meeting



# Technology Etiquettes *continued*

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## Our top tips for audio conferences

### Before the meeting

- 1.** Encourage preparation—send expected outcomes, a clear, short agenda, applicable background reading and key visuals in advance
- 2.** Ensure participants are in a quiet environment or have headsets
- 3.** Limit number of people on the call to essential participants

### During the meeting

- 1.** Just like a face-to-face meeting, some small talk to “break the ice” is useful
- 2.** Open with introductions (all sites), a review of agenda highlights, and any meeting rules
- 3.** Encourage everyone’s participation and ask opinions periodically. Use names to direct questions & responses
- 4.** Build in changes of pace, variety of format
- 5.** Ask for agreement and do not assume that silence equals agreement
- 6.** Silence does not indicate consent; ask people to summarize what actions they will take at the end of the meeting
- 7.** Agree rules on when and how to talk
- 8.** Record actions and minutes or tape the meeting where appropriate
- 9.** Use a speaker phone for multiple participants at the same location
- 10.** Keep conference calls to 40–60 minutes maximum; alternatively plan breaks at this frequency
- 11.** Do not do other things whilst participating—especially typing emails in the background
- 12.** Distribute actions or minutes quickly



# Technology Etiquettes *continued*

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## Instant messenger



### What is it good for

- Short questions requiring an immediate response
- Quick “water-cooler moment” catch-ups with colleagues Signalling availability for a call or other communication

### Disadvantages

- Can be distracting if it interrupts important work
- Can go on too long, it can be quicker to pick up the phone if conversations develop into more detail



# Technology Etiquettes *continued*

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## Our top tips for instant messenger

- 1.** Because IM is quick and typically between 2 people it can feel more like a conversation than some of the other text based technologies. It is a good way to keep in touch with remote colleagues
- 2.** Use the function that allows you to signal your accessibility – indicate status (i.e. busy or away)
- 3.** Set expectations on times you are accessible and times you are not when working on important tasks, distractions can reduce your ability to finish important work
- 4.** Respect other people's status; don't call if they are busy
- 5.** Ask if people have time to chat or answer a question
- 6.** Only connect with people you are prepared to be interrupted by
- 7.** Keep your messages short and be specific about what you need and any time urgency
- 8.** Keep conversations brief. If instant message sessions carry on for several iterations or if you find you are spending significant time typing your responses, it may be more efficient to pick up the phone
- 9.** Many IM systems are not secure; be careful with personal or proprietary information – check your company's guidelines



# Technology Etiquettes *continued*

## Email



What is it good for	Disadvantages
<ul style="list-style-type: none"><li>• Communicating data and information</li><li>• Recipient can open at their convenience (e.g. good for crossing time zones) Creating a record of conversations</li></ul>	<ul style="list-style-type: none"><li>• High volume of often, low quality emails</li><li>• If time sensitive, may not get a quick response</li><li>• Actions and responses needed may not be clear or hidden in message Assumes that recipient has received the email and will respond</li></ul>

### Email activity

If you get dozens of emails a day then they become a major time stealer - often over an hour per day for regular users. As with any major activity it is sometimes good to analyze what is happening. Look at the kind of messages you receive and analyze them according to type of issue, usefulness, urgency etc. Identify messages you can disconnect from.

- > Calculate how many emails you receive in a typical day, and how many of these you really need to receive to do your job.
- > Apply the rules above to your emails for 5 working days – start with disconnecting from or auto-filing the unnecessary ones.
- > See what happens to the volume and quality of the emails' you receive.
- > Make a calendar note to do it again in a few months – managing email is a constant challenge.



# Technology Etiquettes *continued*

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## Our top tips for emails

- 1.** Limit the ones you receive – get yourself off distribution lists where you do not need to receive the message; ask people to take you off unnecessary lists. The best way to reduce the number of unnecessary emails you get is to focus on your own
- 2.** Limit your distribution – only send emails to the people who really need to receive them to do their jobs. Limit your use of “reply to all” and cc-ing emails
- 3.** Use the filtering and other tools in your email system to prioritize the emails you need to pay attention to and auto-file the ones you do not
- 4.** Make the nature of the mail clear in the title, including the names of people who have specific actions and any response required
- 5.** Start your emails with a clear paragraph summarizing the content and actions, so people can see it from the preview pane even if they do not open the full email
- 6.** Prioritize – Agree in your team a system of flagging priority and then use it. Don’t abuse priority flags or people will stop believing you
- 7.** Treat email like regular post – use good time management techniques, ideally handle each mail once only, reply, file it or delete it
- 8.** Messages do not arrive in priority order; do not just deal with them in the order they arrive. Set aside time to read and manage emails – don’t just react to them as they arrive. If you can, turn off incoming mail alerts so you reduce distractions
- 9.** Keep it short – pace the style of the person you are responding to
- 10.** Email is not private correspondence – Do not comment on email anything you would not be prepared to have printed off and publicly available. Don’t forward private or copyright messages without approval