



HISTORIC PRESERVATION CONSULTATION BEST PRACTICES and TIPS for SUCCESS

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PART I MEETING LOGISTICS AND PRACTICALITIES



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Meeting Logistics and Practicalities

When asked to pick the most annoying or distracting things about conference calls, survey respondents named these as the biggest offenders: people talking at the same time (37%), too much background noise (24%), meeting-goers not paying attention (9%), music triggered by someone putting the call on hold (7%), and people talking while thinking they're on mute (7%). But these distractions are more than just annoying, they can kill productivity.¹

FOR EVERYONE: Telephone and Video Meeting Tips²

1. Getting Started

- Get your device (computer, tablet) ready
- Make sure software apps (Zoom, WebEx, MS Meeting) are installed/ready to go
- Make sure speakers, microphones and cameras are ready to go
- Have the meeting information and reference materials available
- Prepare mentally to “engage remotely”

2. Looking Good

- Consider your lighting and background
- Camera at face level or above; check your framing
- Know where the video controls are located
- Maintain eye contact, when possible

3. Sounding Good

- Join from a quiet area
- Use earbuds or a headset
- Consider joining audio by phone (note: phone carrier rates may apply!)
- Know where the mute buttons are

¹ <https://www.microsoft.com/en-us/microsoft-365/growth-center/resources/audio-conferencing-etiquette-to-share-with-co-workers>

² Courtesy Brian Dunkel, E-Corporate College.com, Inc.

4. Being Professional

- Clear the background behind you
- Let people in the area know you are in a meeting and not to disturb you
- Dress/groom as you would for a real life meeting
- Know when to turn your camera off

5. Feeling Secure

- Host should provide a password for each meeting
- Only moderators should be able to share their screen
- Meetings should have a protocol to allow participants to enter (waiting room or host approval)
- Turn on default security features

FOR EVERYONE: Phone and Video Conference Etiquette³

1. **Say your name every time you talk.** Providing your name helps alleviate confusion over who's talking.
2. **Use short, clear and concise messages.** It's best to keep your transmissions short, clear and to the point. This gives other users an opportunity to acknowledge your message or request further clarification before you carry on with your next point.
3. **Be patient.** The other person may not be able to respond immediately – be patient and give them time to reply before re-sending your message.
4. **Make sure you're on mute.** Participants experience a negative impact on their meetings due to noisy distractions, including the inability to get through an agenda, lack of concentration, and lack of enthusiasm about participating. By staying on mute except when talking, this eliminates background noises and also takes care of any potentially embarrassing sounds.
5. **Never put the call on hold.** If you absolutely must step away, which should be done in emergency situations only, just put the phone on mute and go. This takes care of the elevator-music serenade that's all-too-often inflicted on fellow conference callers. Be sure to turn off other notifications, as well, to eradicate those bothersome beeps.

³ <https://www.microsoft.com/en-us/microsoft-365/growth-center/resources/audio-conferencing-etiquette-to-share-with-co-workers> and <https://www.pgi.com/resources/articles/business-etiquette-tips-conference-calls/>

- 3. Don't talk over others.** Multiple people talking at the same time is the most distracting behavior. Too much jabber is not only annoying, it's counterproductive. Wait for an obvious opening, and then identify yourself as you begin talking. Be sure to direct all questions or comments toward a particular person (by name) when possible. This will cut down on any confusion about who is supposed to chime in and when. The meeting host should have a protocol to allow people to "raise their hands" or otherwise indicate they have something to say, and then be called upon in turn.
- 4. Call in early.** We've all been on calls in which the organizer stops what they're doing to announce that someone (or several people) just joined. By being on time, that eliminates the interruption and the embarrassment of being late. If you're hosting and someone calls in late, don't stop the meeting to announce their arrival. Instead, wait for a conversation to finish before mentioning that someone new has just joined.
- 5. Send out meeting materials ahead of time.** How many times have you waited and waited for the meeting organizer to get their screen-share going? While technical difficulties are sometimes unavoidable, there's no excuse not to be prepared. Sending out meeting materials to attendees ahead of time allows for forward momentum until the problem is solved.
- 6. Choose the best online meeting tool.** A good conferencing solution should cut down on these potential distractions by including features such as:
 - Clear displays indicating whether you're on mute or not.
 - Scheduling assistance, note taking, desktop sharing, simple file uploading, and chat messaging.
 - Host ability to control audio, video, and screen share functions
 - Control over meeting entry and exit notifications.
 - Solution that networks with many partners to create a system of apps and collaboration tools that enhance productivity.

