



Meeting face to face or remotely: Evaluating the options

Wondering whether you can have a successful meeting by meeting remotely versus speaking eye to eye? Here's a checklist to help you assess the likelihood of success.

If you agree with most of the statements in the first table, chances are, a face to face meeting will help you achieve your objectives better than a remote meeting. If, however, your responses suggest that a remote meeting may be just as effective, consider the questions in the second table (see reverse) as you make your plans.

| | Strongly agree | Agree | Neutral | Disagree | Strongly disagree |
|--|----------------|-------|---------|----------|-------------------|
| 1. If we achieve our intended outcomes, we have a lot to gain. If we don't, we have a lot to lose. It's critical that we're successful | | | | | |
| 2. We have a great sense of urgency to achieve our goals. Time is of the essence. Delays are unacceptable | | | | | |
| 3. A high degree of trust among team members is critical if we are to meet our objectives | | | | | |
| 4. In-depth conversations are necessary for us to make well-informed decisions and reach agreement | | | | | |
| 5. Topics of discussion are likely to be contentious or may cause conflict or evoke emotion | | | | | |
| 6. Tapping the enthusiasm and energy of all participants will be important for us to achieve our goals | | | | | |
| 7. It is unlikely we can achieve our objectives over a series of several brief meetings | | | | | |
| 8. Creative brainstorming and problem-solving will occupy much of our meeting time | | | | | |
| 9. It's critical that we test understanding, validate assumptions and/or clarify expectations | | | | | |
| 10. Key participants represent a variety of cultures and span multiple time zones | | | | | |
| 11. Not all participants have equal access or comfort with technology used for meeting remotely | | | | | |
| 12. The cost for failing to achieve our objectives is likely to exceed the costs for assembling participants face to face | | | | | |

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Planning for a successful remote meeting

If you answer “yes” to most questions, then with good planning and clear communications, chances are, you will have a successful remote meeting.

| | | |
|--|-----|----|
| 1. Are participants likely to stay focused on the work if we meet remotely? | Yes | No |
| 2. Do we have access to facilitators who are skilled in planning and running remote meetings? | Yes | No |
| 3. Is it possible to carve up the agenda into smaller “chunks” and still achieve the desired results? | Yes | No |
| 4. Can some of the work we would ordinarily do face to face be accomplished either before or after the meeting instead? | Yes | No |
| 5. Are participants likely to pay attention to prework and advance reading that may be necessary if we run the meeting remotely? | Yes | No |
| 6. Do most participants know each other and work well together? | Yes | No |
| 7. Are most participants accustomed to working in a distributed fashion already? | Yes | No |
| 8. Have we considered ways to follow up, maintain momentum, and track progress remotely? | Yes | No |

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