



Remote meetings: how to adapt to a virtual working environment



A word from Claire

Since the outbreak of Covid-19, conferences and events have been cancelled, and training sessions and networking events postponed. But we all still have duties and responsibilities, and the pensions industry (and all industries) must adapt and apply contingency plans in order to continue to deliver.

Since remote working was put in place for many people across the country earlier this year, our Operational Excellence in Pensions team at Isio have been in virtual attendance at a number of all-day meetings. This new way of working will evolve quickly over the next few weeks and we have summarised some key dos and don'ts which you may find useful.

Before a virtual meeting

Do check your **governance documentation** to see if a virtual meeting is acceptable, and consider whether any changes are required, for example:

- How many attendees do you require at the meeting in order to be **quorate**? Are any changes needed to policies in light of a potential higher number of apologies?
- Do you have any **signing protocols** that will require adapting, e.g. signing off previous minutes (use an electronic signature or accept an email as approval in lieu of a signature).

Do explore which **technology** will work best. Several providers are giving free trials of video conferencing and virtual collaboration sites which is likely to lead to a more dynamic virtual meeting than using traditional conference calls. Ask your advisers if they have access to any technology you can use.

Do consider your Board's accessibility – do all have access to laptops or a smart device in order to make video calls? Does anybody have any visual or hearing impairments that need to be considered?

Do **test the audio/video technology** ahead of the meeting and encourage participants to join a few minutes before the formal start time to make sure the technology is working.

Do **prepare differently:**

- make sure meeting papers are easy to read and their purpose is clear and are shared sufficiently in advance.
- limit any 'presenting' of reports. Focus the meeting on elements that really need discussion and debate.
- consider if certain items can be dealt with via email.
- Inform participants in advance where documents will be "taken as read" to ensure that all arrive adequately prepared.

Do make **changes to the usual structure** of your agenda, for example:

- Build in breaks as it may be harder for people to signal they would like a comfort break when working remotely.
- Shorten agenda items as appropriate to allow for a focussed meeting without significant presenting time.

Don't be afraid to **shorten meetings or split** over a number of days to break the time up. Without travel, it may even be easier to 'meet' more regularly.

Do reassure participants in advance that there is an understanding that **home environments can present new challenges**, for example nobody will be offended if a participant's kids feel the need to contribute to the discussion at any point or if somebody's internet connection fails.

Do circulate a mobile number (e.g. of the secretary) to call in case participants have trouble accessing the meeting.

During a virtual meeting

Do turn on the **video function** if available, it helps to see a smile, and also reduces the temptation to “multi-task”..... which leads to:

Don't multi-task. Treat it like an ordinary meeting and give it your full concentration.

Don't automatically assume you should mute yourself when not speaking. Unless you have background noise, it's important for the other people on the call to be able to hear you and judge reactions to what they are saying.

Do start with some ground rules, e.g. ask participants to state their name before first speaking and don't speak over one another.

Do remind participants about data protection. If papers have been printed, they should be confidentially destroyed following the meeting. Where you might have openly discussed personal information within closed meetings, make sure all information is anonymised and names are not used during remote meetings.

Do give each participant the chance to input by pausing regularly and ask each in turn for their questions or thoughts. The person chairing the meeting may have to do this more formally than usual.

Do be clear at the start of each section **what the aim is, and then summarise** before moving on actions, decisions and who is responsible.

Do take regular breaks – e.g. 10 mins every hour and a longer one for lunch.

Do debrief at the end of the meeting to **assess the effectiveness** and suggest changes for next time.

Don't forget the 'water cooler' moments. Take time at the start or end of the meeting to lighten the mood and share how your day is going. Some ideas are below:

- Start the meeting with an inspiring or uplifting quote.
- Discuss a positive news story.
- Ask each participant to share something, for example what they had for breakfast or what the last book they read was.

Get in touch if you'd like to discuss remote working or anything else to do with pension scheme operations, governance and effectiveness.



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