



Cisco on Cisco Best Practice

# Global Meeting Collaboration

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## Introduction

One of the main challenges that global companies face is working together across distances while maintaining productivity, cost-effectiveness, and quality. Cisco is no exception. Although the company was founded in the United States, today more than 40 percent of our employees work outside the United States. As Cisco expanded, business travel costs kept pace (both travel costs and the hidden costs of lost productivity due to travel). Faced with these growing costs, Cisco explored new collaboration tools as an alternative to travel.

This paper is designed to provide some essential guidelines for managing global meeting collaboration that maximizes human capital, improves decision-making quality, and keeps costs down. This paper will also cover the process of how to facilitate global meetings using collaboration technologies.

## Challenges of Managing Global Workforce

Many companies are growing more global. They are expanding their footprint into areas of greater customer growth while taking advantage of lower labor costs and a wider talent pool. Global business strategies require a highly skilled and geographically distributed workforce. In certain cases, it is difficult to draw top talent to corporate headquarter locations; talented employees can often only be hired where they are willing to live. In other cases, emerging global markets make it critical to hire employees in the markets that the company serves because there is no substitute for living in a market to understand it. Sometimes greater customer intimacy can only be gained by placing employees in or near customer sites, wherever they are geographically located.

In the case of lower-skilled workforces, the locus of strategic decision-making can still be centralized in a particular physical location. However, with the emerging global distribution of highly skilled workers in strategic roles, decision-making must be decentralized as well. Decentralization demands an increased level of global collaboration among employees.

Business travel can satisfy some collaboration needs, although it is expensive, difficult on employees, and is not a sustainable solution since successful collaboration within companies needs to be continuous. Occasional face-to-face meetings are useful for establishing new relationships but are completely unworkable as a continuous work process. Although technology is a critical component of the collaboration solution, another element is required: the facilitation skills necessary to run high-quality global virtual meetings.

## Global Communications Strategies

Before discussing collaboration practices for virtual meetings, we need to understand what makes a great meeting. Regardless of whether a meeting is in-person or virtual, the criteria for great meetings remain the same. All great meetings:

- Result in great decisions
- Turn into action
- Build strong relationships

### **Great Meetings Result in Great Decisions**

Great decisions can be measured in many different ways--for example, the inclusiveness of customer feedback or the innovativeness of the decision. Fundamentally, however, the best decisions result in the best outcome at the lowest risk for the organization's primary customers. Great decisions are also implementable; the decisions are lasting and can be followed through by the involved parties.

## **Great Meetings Turn into Action**

Great meetings are also results- and outcome-oriented. Participants should leave the meeting with both a commitment to and understanding of the next steps identified in the meeting. Attendees should remain committed to the agreed-upon next steps to accomplish them.

## **Great Meetings Build Strong Relationships**

Strong relationships are the foundation of strong collaboration teams. Meetings need to help build trust, mutual respect, and an understanding among individuals. The results of a good meeting should include not just the accomplishments decided upon during the meeting, but should build a strong foundational relationship that can be called on when these same people meet again to accomplish something new.

A good team needs to follow a strong collaborative approach to support these goals, one that can overcome the usual barriers to strong team relationships such as geography, time zone, and cultural styles.

## **Challenges of Global Virtual Meetings**

The term “virtual meeting” relates to group communication forms in which some (or all) of the participants are not physically present. Instead, they are connected by audio, video, or shared desktop presentations, or all three. A virtual meeting can have any duration, but this paper primarily focuses on longer, multi-session virtual meetings. These longer virtual meetings have various challenges, detailed below.

### **Balanced Participation**

The principal challenge to the three attributes of great meetings is the difficulty in achieving balanced participation. To accept the decisions and actions defined in the meeting, participants must feel that they are as empowered to contribute as any other participant, and that their views heard and respected.

### **Time Zone Differences**

Time zone differences provide a challenge to all global meetings, even ones that involve travel. In a multi-day virtual meeting, or in virtual meetings that involve three broadly separated time zones, participants in at least one time zone are required to meet at an hour when they cannot contribute at their best. In almost all cases, the “main” time zone will win out, and remote participants will be participating during non-business hours. In the case of very long meetings, we recommend running them in sequential parts using an asynchronous approach to solve time zone issues. (An asynchronous, follow-the-sun meeting involves breaking the global team into breakout sessions to work on a particular task – brainstorming new ideas, discussing sub-topics, asynchronously at times convenient to their location for a few iterations; then coming together to share and compare results in a final synchronous meeting.) See the case study at the end of this document for more detail.

### **Speaker Identification**

Unless people clearly identify themselves when they speak, virtual participants will often find it difficult to know who is speaking. Studies show that hearing in stereo, such as the audio provided by Cisco TelePresence® systems, provides profound advantages for being able to disentangle overlapping conversations. Cisco WebEx® automatically identifies the current speaker in the main console. However, automatic speaker identification can be problematic if an entire meeting room with one audio connection is dialed into a meeting.

### **Visual Cues and Solutions**

Body language and facial expression give in-room participants information that is not available to remote participants. The remote participant’s body language is often lost in a virtual meeting. A phrase said with a smile can have a very different meaning than the same phrase uttered with a frown or a head-shake. The inability to see visual cues can add an additional layer of complexity to cultural communications differences. That is why, whenever it is possible, video is the best solution for virtual meetings.

## Holding Participant Attention

Remote participants have a harder time paying attention, especially for a long time. Engaging participants in conversation, or asking questions is an important feature of a successful virtual meeting.

Enabling remote participants to collaborate, share their views, or comment is extremely important to keep them focused on the topic.

## Best Practices for Global Virtual Meetings

Cisco follows these best practices when planning, running, and following-up after a meeting.

### Planning a Virtual Meeting

The first set of best practices cover planning and preparation that should occur before a virtual meeting. (Table 1).

**Table 1.** Cisco Best Practices for Planning a Virtual Meeting

Planning Activity	Description
Involvement of remote participants and meeting managers	<ul style="list-style-type: none"><li>• Set up a team of two or three people to act as facilitators, and build a project structure that can manage the meeting's outcome.</li><li>• Design the meeting's activities, schedules, and choice of collaboration tools to meet the needs of the person whose location is farthest from the other team members. Follow the Sun is recommended when the team members are spread across the globe and no single meeting time works for everyone, using an asynchronous approach.</li><li>• Involve participants in the design of the facilitation process so they can understand and participate in the meeting successfully.</li></ul>
Multiple meeting schedules	<ul style="list-style-type: none"><li>• Plan multiple meeting times to accommodate both distant and adjacent time zones, then consolidate and compare the schedules across all time zones.</li></ul>
Meeting work in segments and modules	<ul style="list-style-type: none"><li>• Segment the meeting's work and decisions and spread out those segments over time. Also identify work modules that can be conducted as serial or parallel activities.</li></ul>
Agenda inputs and outputs for each meeting module	<ul style="list-style-type: none"><li>• Map inputs and outputs among agenda items (i.e., agenda item 1 outputs become inputs for agenda item 2). Test and re-test the meeting agenda with key participants. Keep revisiting these items, especially for asynchronous meetings.</li></ul>
Time zone overlap	<ul style="list-style-type: none"><li>• Leverage any overlap in time zones for decision-making, especially for decisions that require real-time interaction and dialogue among the meeting participants.</li><li>• Schedule "handover" meetings so the teams in disparate time zones can discuss and expand upon the work done by each.</li></ul>
Meeting support	<ul style="list-style-type: none"><li>• Plan for backups and contingencies: meeting times, topics, decisions, people, meeting rooms, and technology resources.</li><li>• Allocate support and testing resources for technology so participants can get help if needed during the meeting. Match the meeting plan to the technology available in each location.</li></ul>

### Match the Media to the Meeting

Consider the availability of equipment, meeting space, bandwidth availability, and other technical requirements for all locations when choosing media. If some participants have greater media "richness," they will be drawn into that medium, which can lead to exclusion of other participants from the meeting experience and discussion.

Try to give all participants access to the same media and technology throughout the meeting. Using the same technologies is essential for giving all participants a common experience.

Also, consider how to best match the collaboration media to the nature of the meeting and how new media could improve the meeting experience. (Table 2). For example, using Cisco® TelePresence systems for a small-group meeting can lead to a much more meaningful and interactive discussion compared to a voice-only conference call; using screen sharing and IM adds to the communication capabilities; and sharing each team’s output on a common wiki or other online areas helps share information across groups. Additionally, make technology choices that can support future virtual meetings at each location.

**Table 2.** Hierarchy of User Experience for Virtual Collaboration Media

Richness Level	Media Type
1	In-person meetings
2	Cisco TelePresence virtual meetings
3	Cisco WebEx online meetings with video
4	Desktop and small-group video communication endpoints
5	Audio conferences
6	Real-time online chat using Cisco Jabber™
7	Non-real-time discussions in blogs, online discussion forums, wiki's, and posts to content libraries

## Running the Meeting

The following practices help to improve the user experience and collaboration activity during a virtual meeting:

- Summarize or provide access to online activity for all participants. For example, record WebEx sessions and email or post the links and any additional collateral documents to participants.
- Place opposites together to balance conflict. For example, if two functional teams have strong opposing views compared to the overall team, place them together so the conflict is contained and doesn’t spread to the broader team.
- Use a reliable way to capture the meeting’s outcomes by immediately and formally documenting discussions so there is no “re-interpretation” of decisions. Share this with all teams.
- Give up some control to the group consensus. Facilitators need to have neutrality in the decision process and should drive the meeting to the desired outcomes, not to their own opinions.

## After the Meeting

Activities conducted after the meeting ends are important for implementing the participants’ decisions and for improving future virtual meetings.

- Create an ongoing process for managing and delivering the meeting’s outcomes and adjusting them as needed.
- Develop a process to measure the effectiveness of the meeting’s decisions and to identify the root cause of failed decisions before investing time in a new meeting.

- Capture feedback from participants about the meeting's process and build it into planning for the next virtual meeting.

### Building Virtual Relationships

The quality of virtual collaboration is very dependent upon the quality of personal relationships among the meeting's participants. Just because a team works virtually is no reason to invest less time in building effective working relationships.

Teams need to spend the same amount of effort and time to connect with people virtually as they would in a face-to-face environment. These practices can encourage that relationship-building:

- Promote occasional, personal, and unstructured meetings among participants, using face-to-face meetings where possible or rich-media technology such as Cisco TelePresence to enhance the experience when travel is difficult or expensive.
- Encourage participants to use Cisco TelePresence and some form of high-definition video for informal conversations in the same way that these conversations would occur in a meeting room. Create opportunities for video talks among distant participants during the meeting's breaks.

### Recommended Resources for Virtual Collaboration

Certain resources, both technology and people, help to enable a successful virtual meeting. (Table 3).

**Table 3.** Technology Resources for Virtual Collaboration

Technology Resources	Considerations
Voice call and audio conferencing	Easy access for all participants.
High-definition video	Higher frame rates allow greater capture of body language and better interaction among remote meeting participants.
Cisco WebEx Connect	Can trade ownership of the screen and some control of content; allows multiple data inputs over chat.
Web-based tool to support meeting facilitation	Videoconferencing tools, meeting software, collaboration tools.
Idea capture tools (Mind Map)	Good way to capture and consolidate multiple ideas from multiple people, but in group situations it can lead to "group think." To avoid this situation, establish and follow rules about idea capture.

The roles in Table 4 are especially valuable for managing and supporting large virtual meetings. (Table 4).

**Table 4.** People Resources for Large, Global, Virtual Meetings

People	Considerations
Meeting Facilitator	Handle a complex schedule that involves multiple participants and time zones.
Meeting Leader	Person from the company, department, or group who will need to manage the meeting's outcomes.
Technology Coordinator	Coordinate the various technologies and provide needed support in the background without distracting the meeting's facilitator.

On-site Facilitator	If possible, a person in the various time zones to coordinate breakout sessions and transition reports.
Note Keeper	A single person for all sessions who can record notes about discussion points, decisions, and action plans.

Table 5 presents a summary of how Cisco best practices meet the challenges of conducting successful virtual meetings.

**Table 5.** Summary of Cisco Best Practices for Virtual Meetings

Virtual Collaboration Challenge	Virtual Meeting Best Practice
Remote versus on-site participation	<ul style="list-style-type: none"> <li>Facilitate the real-time discussions to allow contribution from all participants.</li> </ul>
Time-zone scheduling and transitions	<ul style="list-style-type: none"> <li>Plan multiple meetings to accommodate different time zones.</li> <li>Group meeting participants in adjacent time zones.</li> <li>Use session reports and handoff activities to allow the discussion and agenda progress in the next time zone.</li> </ul>
Access to information, media, and tools	<ul style="list-style-type: none"> <li>Try to give all participants access to the same media and technology throughout the meeting.</li> <li>Look at the availability of equipment, meeting space, and bandwidth when choosing virtual collaboration technology for a specific site.</li> </ul>
Hierarchy, culture, and process factors	<ul style="list-style-type: none"> <li>Structure meeting activities to support the same level of participation by remote and local participants.</li> <li>Recognize when distance is compounding differences in communications style and level of participation.</li> </ul>
Decision quality	<ul style="list-style-type: none"> <li>Use a mix of technologies to encourage active participation by everyone: video, desktop sharing, and real-time blogging during the meeting.</li> </ul>

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## Case Study: Global Virtual Meeting

Cisco has experienced the above challenges in its own virtual meetings and, to address them, has developed a set of best practices. These practices make it possible to run virtual, multiday, global meetings across time zones while achieving the balanced participation necessary to achieve great meetings.

In-person and virtual meetings should be approached differently, even though they appear to be similar for facilitation purposes. The following case study provides an example of what is possible when the advantages of the virtual format are embraced.

**Organization:** Cisco IT Operating Model Team

**Objective:** Develop a two-year plan for the evolution of the Cisco IT Enterprise-wide Operating Model

**Participants:** 30 Directors and Senior Directors representing 12 different organizations within IT

**Participant Locations:** Outside United States; Amsterdam, Glasgow, and Sydney. Within United States: San Jose and Petaluma, California; Raleigh, North Carolina

**Duration:** Two full days

**Travel Budget:** None

**Facilitation Team:** Two facilitators on the US West Coast, one in Australia

**Technology Used:** TelePresence, WebEx, and web-based facilitation software.

A team of Cisco IT executives has been working together to develop a new IT Operating Model, to transform business needs to architecture and then into IT services, with a clear costing model (see the [Cisco IT Operating Model case study](#)). They had been working for nearly a year and had developed enough trust in the facilitation team to try experimental meeting techniques for this meeting. The facilitation team was consisted of experienced members; however, they faced a great challenge during the planning of the project. The first meeting proved to be successful, due to the use of virtual facilitation techniques and technologies detailed below.

### The Follow-the-Sun Meeting

The different time zones presented a real challenge: How would it be possible to have everyone meeting at a reasonable time in their own time zone?

The solution took advantage of how meetings are normally structured and the use of video technology. In a meeting of this size and duration, facilitators frequently hold breakout sessions with groups of five to ten members so that everyone has an opportunity to contribute and generate a diversity of ideas. Breakout teams move away from each other to discuss sub-topics, then reconvene to report on their work. Within the general meeting, discussion and decisions follow these reports.

The key for a global virtual meeting is to schedule the breakout sessions so that teams consist of members in adjacent time zones. This arrangement allows the teams to hold their breakout sessions during normal working hours. Each team's report is recorded, then viewed later in the other time zones. Once the reports have been heard by the meeting participants in all time zones, the entire group comes together briefly for discussion and decision-making.

To make this activity feasible from a timing perspective, two or three breakout teams in each time zone would need to complete their sessions during their working hours, maintaining productivity within the team and reducing distraction. An asynchronous schedule was created to facilitate all participants.

## Solving the Virtual Meeting Challenges

**Main room.** Because the majority of participants were located in San Jose, they might have had an unfair advantage in meeting contribution. To avoid this factor, the San Jose participants were divided into groups, working in separate rooms, with a size similar to the groups of remote participants. This approach meant that no single group had a significant advantage over the others during the general sessions for discussion and decision-making. Although somewhat artificial, this action created a sense of balanced contribution.

**Audio quality.** The key to audio quality is having a separate microphone located next to each participant. This solution can be achieved in many ways, such as using Cisco TelePresence rooms or asking participants to call into the meeting from their desk phone. In this meeting, some participants used desk phones; the conference rooms had individual microphones placed on the table in front of each pair of participants.

**Visual cues.** Remote participants connected to the meeting using Cisco WebEx videoconferencing solution. Cisco WebEx displays an image of each participant at the edge of the screen, and when a participant speaks, his or her image is moved to the center of the screen. In each conference room, the video from remote participants was projected onto a screen, and a mobile camera captured images of speakers so they could be seen by remote participants.

**Side discussion.** Listeners can be confused by side discussions if they interfere with the main meeting audio. Yet, side discussions are an unavoidable and important form of communication in a meeting. Ideally, side discussions could happen among meeting participants who are not co-located. In parallel with the audio and video discussions, a real-time blog allowed every participant to contribute, view, and respond to information and comments. Some blog posts were used for overarching discussions that spanned the whole meeting. Other blog posts were created to capture the written content of breakout discussions, replacing the sticky notes and flip charts commonly used for in-person meetings.

## Results

The success of these virtual IT planning sessions produced both direct benefits for Cisco and an ongoing model for other virtual meetings. The primary benefit was travel avoidance for several meeting participants, which yielded US \$27,000 in saved travel costs, 130 hours of travel time saved, and prevented 5.64 metric tons of carbon emissions.

As an ongoing model, this meeting produced value in the form of:

- The team created an IT Operating Model that has become the major foundation for our IT as a Service program, and has significantly increased business participation in IT planning and business satisfaction with IT investment. This Operating Model has, with minor changes, remained in use for more than four years inside Cisco IT.
- The team built strong relationships during their work and continued to work together productively after the sessions described here were complete.
- These processes have been used repeatedly and successfully across many types of meetings.
- Significant travel was avoided, along with the associated costs and carbon emissions.
- Opportunities arose for new meetings that would not have been possible before because of the financial constraints of the travel involved.
- This practice is now a model for virtual meetings that has been adopted by other employee teams across Cisco.
- This practice is now a basis for leveraging new and emerging collaboration technologies such as Cisco TelePresence and HD video in WebEx sessions.

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## Lessons Learned

Any large and complex virtual meeting will produce multiple lessons for future improvements. The lessons for this meeting included:

- The virtual meeting process requires a high time investment from the facilitators to prepare the content and logistics. Also, as with any facilitated meeting, things can change during the meeting, and facilitators need to be ready to manage changes in schedules across multiple groups and time zones.
- The effectiveness of the facilitators is critical, and their time zones should be considered in the meeting schedule so they are working at times when they can produce good results.
- The facilitation process works best with teams that have a clear sense of purpose. Solving participation issues doesn't solve all team issues and, as with any major business decision, the best results will come from teams that have clear objectives and strong sponsorship.
- Bringing teams together in a virtual meeting is not always a natural experience. Participants need to invest the time and effort for team-building activities that would occur naturally if people were meeting in person. (See the section "Building Virtual Relationships" for ideas.)

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## For More Information

To read additional Cisco IT case studies on a variety of business solutions, visit [Cisco on Cisco: Inside Cisco IT](#).

## Note

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