

# Chairing and Conducting Effective Meetings

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September, 2017



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## ABOUT AAL

AAL is a collaborative of scholars, educational specialists, and leaders who assist institutions and organizations to strengthen their unique value to the people they serve. AAL achieves its mission through professional development and consulting services. AAL's clients and partners include universities, associations, and corporations worldwide.

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# CHAIRING & CONDUCTING EFFECTIVE MEETINGS

As President of the Academy for Academic Leadership (AAL), I chair a lot of meetings. Whether they have been face-to-face or virtual meetings, like anyone, I have had good and bad experiences. From those experiences and the shared wisdom of other leaders, I have developed practices that I use in leadership coaching with our clients. I share them here. Whether you are seasoned at chairing meetings or are new to the experience, following these tips will make meetings more effective—for you and others.

## Problems with Meetings

For most of us, it is a rare and cherished workday when we have no meetings on the schedule. Why is that? Why don't we celebrate our meeting-filled workdays?

The answer relates to productivity. Look at this list of common meeting complaints:

- The right people are not present.
- Too many people are present to accomplish anything.
- The meeting was not necessary; rather, a briefing, or information sharing via memo, would have sufficed.
- The meeting contains:
  - irrelevant information
  - no stated purpose or objective
  - no clear agenda
- The chair has no control of the meeting.

- Decisions are made and not executed.
- The chair has a personal agenda or is not impartial.

Note how many of these complaints affect our ability to be productive. How, then, can you make your meetings more effective, so all participants find meetings valuable to their performance?

After a quick overview of three general types of meetings, we explore alternatives to them. We then discuss meeting basics—guidelines to follow. Then, we focus on our role as chairs in facilitating effective meetings and learn strategies to handle common meeting challenges. Finally, we look at additional steps to make virtual meetings more effective.

*MEETINGS . . . ARE  
INDISPENSABLE WHEN  
YOU DON'T WANT TO  
DO ANYTHING.*

— JOHN KENNETH GALBRAITH

## Meeting Types

Meetings can be classified as three types: information giving, information receiving, and problem solving. These categories aren't mutually exclusive, but the primary purpose of a meeting typically determines its classification.

### Information Giving

Information-giving meetings can include large numbers of people, because they typically do not feature much back-and-forth discussion. Rather, the chair or a guest presents on a subject. These meetings might include attendees who do not have expertise on the subject. They might be set in a large conference room with theater-style seating, or in a webinar.

## Information Receiving

Information-receiving meetings help the chair and/or members of the team obtain information or opinions from others who are present. They are sometimes called advisory meetings, and they require a setting that permits open discussion with questions and answers (Q and A), and participation by all attendees.

## Problem Solving

Problem-solving meetings require a problem statement, background information, and group discussion, with a clear purpose of determining a solution. Brainstorming frequently is a component of problem-solving meetings, so whether in person or virtual, these meetings must include a means for collaborative note taking. They usually are best conducted in a small group, where group members have eye contact and body language can be interpreted (Figure 1; video helps in virtual problem-solving meetings; see the section Virtual Meeting Tips).



**Figure 1.** A typical problem-solving meeting. Note the small group size and interactivity.

## Meeting Alternatives

Ray Williams, author of *Wired for Success*, *Eye of the Storm: How Mindful Leaders Transform Chaotic Workplaces*, and *The Leadership*

*Edge*, and contributor to *The Washington Post*, *USA Today*, and *The Huffington Post*, among others, reports in *Psychology Today* that 40-50% of executives' and managers' time is filled by meetings, which would explain our struggles to feel productive and manage expanding working hours. Williams goes so far as to suggest we cancel 50% of our meetings!

How would we go about doing that? A good rule of thumb is that, if the meeting isn't absolutely necessary—if you can think of alternatives to having the meeting—then do not schedule it. The most common cases are information-giving meetings, in which the purpose is to disseminate information. Follow one of these alternatives instead.

## Emails and Memos

If the purpose of a meeting is simply to give information, and in-person Q and A is not necessary, an email or memo is sufficient. Consider that the rare hardcopy memo may well receive more attention than an email.

## Reports

When you need to share a large amount of material with others, reports are the best way of doing so. Reports can be a preface to a meeting. If your team will need an opportunity for Q and A, then share the report, collect and pare the team's questions, and schedule a meeting just to provide answers.

If a follow-up discussion to the report will be necessary, then schedule a brief and focused follow-up meeting after your team has time to review the report. Another option is to send the full report to your team for reference, but assign small chunks of it to individual team members for a deep read and analysis; come together for a targeted summary discussion in which team members briefly present on their assigned sections.

# One-on-One Discussions

Frequently, a group of people is not required to get something done; all that is required is getting the right person engaged with the task. The accomplishment can then be shared with the team by email.

## Postponement

Postponing a meeting also is an alternative. Among the reasons for postponing a meeting is not having the right people present. If the necessary resources are not available, the group members will appreciate your rescheduling the entire meeting. It shows them that you value their time.

## Meeting Basics

Three basic elements are important for any type of meeting to be effective, whether it is in person or virtual: a strong agenda that is shared ahead of time, ground rules, and closure notes or minutes.

Agenda		
Date:	Start Time:	End Time:
Location:		
Purpose:		
Supporting Objectives (specific and measurable):		
Participants		Position and/or Special Expertise
Agenda Items (and person responsible if other than Chair):		Time:
Action Steps:		

Figure 1. A sample meeting agenda.

### 1. Agenda

Figure 2 shows a sample meeting agenda template; while not every meeting requires such an elaborate agenda, beginning with a thorough template is a good idea, especially when it is the first of an ongoing, or regularly scheduled, meeting with a new group of people.

Certain elements of this template are key:

- Date
- Start time
- Location
- Objectives (i.e., Why are you meeting?)
- Participants

If the meeting is ongoing, and its participants are known from week to week, it may not be necessary to list them every time. However, if it is a new meeting or a task-force meeting, listing the participants is critical. It lets other attendees know who is going to be there and what their expertise or relevance is.

Agenda items, and the person responsible for each item, should be listed.

The format of the agenda can be varied, depending on the meeting. At AAL, we use a collaborative, web-based agenda on a Google Sheet that contains simple, bullet-pointed items that we cover from week to week. To it, we add updates and new action items that we need to track.

Sometimes, depending on the meeting I am facilitating, I use an expanded agenda. An expanded agenda includes the agenda item, along with a brief description beneath it that explains what the group will be discussing and the item's objective, or purpose.

Consider time allotments for certain agendas. If you suspect that a particular topic will dominate the discussion during a meeting, yet the group does not have a lot of time to spend on that subject, assign a limited amount of time to its agenda item. When that time expires, move on, scheduling that item for a future agenda or discussion.

### 2. Ground Rules

What does ground rules mean? In this

context, the term does not mean Sturgis Standard Code of Parliamentary Procedure or other rules of order. Ground rules are values-guided expectations that the group has of itself, and that individual members of the group or committee have of one another. For example, the following ground rules were developed by a strategic planning committee with whom AAL met on a consistent basis for about eight months:

Adhere to values that promote constructive dialogue:

- Collaboration and inclusion
- Mutual respect for different opinions (agree to disagree)
- Openness to new ideas
- Open and accessible communication
- Constructive criticism of ideas (rather than criticisms of individuals or groups)
- A focus on the good of the institution rather than self-interest

Look at some of these: collaboration and inclusion, openness to new ideas, and focusing on the good of the institution, rather than self-interest. Values-driven expectations like these help the committee function effectively; they also make the committee an example to the entire organization in terms of strategic planning.

Other ground rules we have seen include “Be transparent. Put the company (not the unit or department) first. Be creative.” Committee members have come up with these to set expectations for each other. As a chair, you may find yourself referring to them, especially when the meeting gets off purpose or even out of order (see the section Meeting Challenges).

Patrick Lencioni’s book *The Five Dysfunctions of a Team* is an excellent text that forces leaders to consider the converse: functions of effective teams. Figure 3 shows the

characteristics of functional teams and can help as you consider the values that might drive your meetings’ ground rules.



**Figure 3.** Characteristics of functional teams that can help you develop meeting ground rules. (Source: Lencioni, P. *The Five Dysfunctions of a Team: A Leadership Fable*. San Francisco: Jossey-Bass, 2002.)

Using Lencioni’s model, AAL consultant Dr. Robert Smith applies the functions of effective teams to meetings as follows:

#### **Trust:**

At the base of the pyramid is trust. Trust is a characteristic of an effective committee or task force. Members of great teams trust one another on a fundamental, emotional level. They are comfortable being vulnerable with each other about their weaknesses, mistakes, fears, and behaviors. Trust is the basis of effective group meetings.

#### **Conflict Tolerance:**

Teams, committees, and task forces that are built on trust are not afraid to engage in a passionate dialogue around issues and decisions that are key to the organization’s future.

#### **Commitment:**

In meetings, those groups that can engage in conflict are able to achieve buy-in—or commitment—around important decisions, even when participants disagree. The group works toward a consensus but sometimes cannot get there; nevertheless, meetings can result in commitment from everyone. It is an agreement to disagree.

## Accountability:

Teams, committees, and task forces that commit to decisions and standards of performance do not hesitate to hold each other accountable for adhering to those decisions and standards. Groups and teams can hold each other accountable to live up to the meeting's ground rules, whether they are values or principles of how the team is going to function.

## Results:

Teams, committees, and task forces that have trust, engage in conflict, commit to decisions, and have members who hold each other accountable are likely to set aside individual needs and agendas, and focus almost exclusively on what is best for their organization.

## 3. Closure Notes or Minutes

In some cases, company or institutional policy requires that committees keep minutes, rather than closure notes; I define minutes as almost-verbatim conversation of what happened during a meeting. Minutes are detailed in terms of what was said and who said it, leaving little to the imagination.

**CLOSURE NOTES**  
Meeting Date: \_\_/\_\_/\_\_  
Attendees:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Action	Responsibility	Due Date

Figure 4. Sample template for closure notes.

In contrast, *closure notes* are follow-up notes to a meeting—that is, an action plan. Figure 4 provides a template for closure notes.

Typically, details would include the following:

- Meeting date
- Attendees
- Each action item
- Person(s) responsible for each action item
- Due date(s) for each action item

Use of closure notes keeps meetings on track without the effort of keeping verbatim minutes. Every meeting should have closure notes that are shared with attendees; for most meetings, the action plan can be summarized in a page or two.

## Role of the Meeting Chair

### Before the Meeting: Prepare

#### Set Purpose, Develop Agenda, and Share

First, define the meeting's purpose. Then develop the agenda, which should state that purpose, along with all the other items listed under Meeting Basics. I encourage chairs to develop agendas in collaboration with others. Ask the team members what they think you need to discuss, and, between meetings, ask again what key issues they'd like to see on the next agenda. Promote an open atmosphere, in part by engaging all participants.

Share the agenda, and circulate any background materials, such as articles and documents. Because people process information differently, it is important to give meeting attendees advance opportunity to review and think about the agenda and meeting materials, so they will be prepared to participate. Ideally, attendees will have the agenda at least 24 hours before the meeting. If the meeting requires reading

background materials, then additional time is necessary based on the amount of pre-reading.

Doing this advance work is particularly important in today's virtual meeting environment; share any pre-reading ahead of time to keep your virtual meeting efficient and focused, and clearly set the expectation among team members that they actually will read the material (see the section Virtual Meeting Tips).

### **Consider Timing**

Select a time, date, and location that is as convenient as possible for everyone on the committee. In some cases, that will mean scheduling an ongoing meeting at a set time over a period of weeks or months. In other cases, it might mean the meeting times will be varied to accommodate different schedules.

In addition to selecting the meeting time, you might want to put time frames on the agenda. Whether to do so is based on the type of meeting you will chair and, as mentioned, whether you suspect team members will focus more time than can be allotted to a particular topic.

### **Consider Setting**

Schedule a meeting in a room that is conducive to the meeting's purpose. Again, a problem-solving meeting is frequently best conducted around a conference table with a small group of people. Ensure that the room setup and size fit the meeting's purpose.

## **During the Meeting: Maintain Focus, Listen, and Ask Guiding Questions**

As chair, it is your responsibility to maintain focus and order, and to foster collaborative work. Create an environment in which group members feel safe to share their ideas and opinions, and you will encourage valuable discussion from everyone. Sometimes, encouraging contributions means directly asking individuals what they think.

Greet all the attendees as they arrive, and start and conclude the meeting on time. Setting the expectation that you will begin and end on time is important. If you allow people to arrive late, a habit of late starts tends to develop. Do not spend meeting time reviewing for late arrivals what has already taken place in their absence, and close your meetings on time, even if that means tabling unaddressed agenda items. Setting and following through on these expectations demonstrates respect for your team members' time.

Appoint someone to be meeting secretary and take closure notes or minutes. That person should distribute them after the meeting. Use the notes to guide the group in its completion of tasks and assignments by referring to them from meeting to meeting.

A good way to begin each meeting is to review the agenda. If the committee is a new one, take time to review the committee's charge and discuss it. Focus on the objectives, set deadlines if necessary, and remember that the important work happens between the meetings.

If the meeting is an ongoing one, provide a progress summary; again, refer to closure notes. Have team members who were assigned between-meeting activities report on what has happened. Look at the accomplishments, and link them to the agenda for that day's meeting. If there have been problems accomplishing items that were identified as action steps in a previous meeting, discuss what the problems are and how the team can resolve them.

Avoid exhibiting any type of bias or forcing your ideas. A meeting chair should be objective. Be supportive of others, and do not make decisions for the group; rather, help the group work toward consensus.

Use active listening skills, which are simple: Maintain eye contact, and use the guiding questions defined below. They help you to engage the meeting participants and track and understand how others are thinking and

processing information. Asking questions is an art; practice using the following four types of questions (Miller & Heiman, 1987) to improve focus and efficiency during the meetings you conduct.

## Confirmation Questions

Confirmation questions use words like still, remain, continue, now, currently. Here's an example: You are in a meeting, and the committee is looking at your institution's clinic information system. There have been some problems with it.

As chair, you simply begin with a question that follows up on a previous meeting: "Do we still agree that our clinic information system is inadequate for our research purposes?" With that, you confirm where you think the committee is at that time.

Ask confirmation questions whenever you are uncertain of where the committee stands, or if you want to make sure that the committee members are on the same page as you move a meeting and action plan forward.

## New-Information Questions

New-information questions are just what their name says: getting new information by asking the right questions. In the above case, then, a chair might say, "Describe for me the types of data that you wish to collect." In other words, the chair asks that, if the clinic information system is inadequate, the committee describe exactly what data it needs to collect. The committee is asked to share new information.

## Attitude Questions

Attitude questions are important for discerning people's opinions, feelings, reactions, and attitudes. For example, in a discussion about an organization's information management system, the meeting chair might ask, "So, how do we feel about upgrading the system?" In

that way, the chair can elicit people's attitudes.

Remember that people's decisions will be tied largely to their attitudes, emotions, and feelings. Decisions will not be simply fact based.

## Commitment Questions

Commitment questions are appropriate any time a chair needs the group to commit or make a decision. Commitment questions advance a group with a large project or steps in a project or activity. In the above example, a commitment question would be, "Does everyone agree that the next step is to produce an RFP?" Let the answer guide the meeting. If the answer is Yes, the meeting takes one direction; if the answer is No, it takes another.

As a chair, use these four types of questions to engage your committees, task forces, and other teams with which you work. Weave the different types of questions throughout the meeting.

## After and Between Meetings: Follow Up

Because meetings set the stage for activities and projects, before closing, determine how you will communicate between meetings. It could be through one-on-one conversations, emails, or a collaborative, web-based sheet. The methods vary, but during the meeting, be sure to talk about how the group will communicate about whatever it agrees to accomplish at the meeting.

## Obtain Feedback

As chair, you must be able to ask for and accept feedback. From time to time, check in with the team and ask how they are doing and what you, as chair, can do to be more effective for the team. If necessary, follow with productive questions.



**Figure 5.** Look at the expressions and body language in this image. What might you do to re-focus the group?

## Meeting Challenges

What should a chair do when a meeting gets out of control? Take a look at Figure 5. Some things appear out of control here. Consider meetings in which things got challenging for you as chair. What happened? What did you do? What lessons did you learn?

When a meeting gets out of control, as chair, your first strategy should be to maintain composure. Keep your cool, and take a deep breath. Refocus the group on the purpose of the meeting. Be polite, and ask for others' input. All efforts should focus on the meeting's purpose. Usually, when things get out of control, it's because the meeting is off purpose.

If there is disruptive behavior, deal with it immediately and show that you are in control. Regain order by referring to the ground rules. These ground rules are expectations of behaviors, values, and principles to which the committee agreed. Therefore, as chair, you can always call people back to the ground rules.

To deal with disruptive individuals in a meeting, I frequently use something I call a parking lot. A parking lot is a whiteboard or a flip chart on which meeting topics to address later can be "parked." I might say to the person who's being disruptive, "This is an important idea that we should cover later," or "This is an idea that we

need to pursue later. We won't lose it, because we're going to park it over here." Doing so allows me to refocus on the purpose of the meeting. I can capture a disruptive individual's thought or idea in the parking lot, but move on with the purpose.

Many times, disruptions in meetings are because someone has a pet peeve or issue that he or she wishes to address. It is entirely appropriate for a meeting chair to say, "This is an issue that we should discuss in private; let's stay focused on the agenda." Sometimes, other people sitting around the table have ideas that will help you maintain that focus, so a chair might simply need to engage others' opinions.

Another strategy is to avoid eye contact. If you have a group member who talks too much, the chair can minimize that person's talking by not looking at the person. The chair can ask others what they think about whatever subject is being discussed.

If two or more members of your committee have an issue, you will have to act as the mediator to defuse the situation. Do not be drawn into arguments. Instead, bring things back to focus on the agenda. In some cases, it may be necessary to address a situation with individuals outside of the meeting.

Rarely, a chair might come to a point in a meeting in which a person has to be asked to leave, a break has to be called to allow everyone to regroup, or the meeting has to be adjourned. If the meeting is not productive and/or feels out of control, it is appropriate for the meeting chair to say, "It seems like we're not making the progress that we should. Let's adjourn the meeting, and let's get back together [at an appointed time]."

## Virtual Meeting Tips

Virtual meetings require some additional strategies from chairs. Try the following tips to improve engagement during your inevitable virtual meetings.

## Use Video and Record

When possible, humanize your virtual meetings and use your active listening skills by turning on video. Consider whether recording the meeting is appropriate and permitted, in case you want to share the meeting later. Video helps participants to feel part of the dialogue with others. It also enables everyone to monitor facial expressions, which matter in give-and-take discussions. Finally, use of video reduces everyone's temptation to multitask while in a virtual meeting. Many options exist for video conferencing.

## Prepare to Have a Useful Conversation While You Wait

Virtual meetings almost always require waiting for others to join. You should aim to begin the meeting promptly, but sometimes delaying the start for two to three minutes (but no longer) is necessary. As chair, you can warm up the group by posing a few questions, unrelated to meeting agenda, as conversation starters. The default conversation is usually about the weather! In most cases, there are more interesting topics to discuss while you wait. The warm-up should be light—for example, avoid politics.

## Establish the Reasons for the Meeting Upfront

After welcoming everyone to the meeting, establish the purpose and objectives upfront. Going over the agenda helps. Setting expectations for virtual meetings is probably even more important than for face-to-face meetings. Virtual meetings, especially involving conference calls where the participants are unseen, are subject to the numerous distractions that surround the attendee—the Internet, email, newspapers and magazines, and even interruptions from visitors stopping by one's office. Keep the meeting focused on the agenda and move things along as quickly as practicable.

## Set Virtual Ground Rules

Ground rules take on added importance in virtual meetings. Set the expectation that attendees will be “present” and respectful in the same way they would during an in-person meeting. That means no muting the call to handle emails or unload the dishwasher. Agree that any pre-reading and pre-reporting will be done by all, with the objective of keeping the virtual meeting more engaging, focused, and efficient.

## Call on Everyone

When you chair a virtual meeting, keep attendees engaged by making an effort to ask each person for his or her thoughts at least once. Where there are responsibilities that can be shared, such as recording brainstorming ideas and taking closing notes, rotate them so that everyone participates.

## Summary

When chairing a meeting, first consider the alternatives and have a meeting only when it is necessary. Be particularly careful when considering information-giving meetings.

Set the agenda, and make sure that it contains a clear purpose and objectives. What do you and the team want to accomplish out of this meeting?

Establish ground rules, and do it collaboratively; if the meeting is of a new group and/or virtual, it is especially important. Ground rules are what group members expect from one other.

All meetings should have closure notes, or minutes. Closure notes are a map for getting things done between meetings.

Use active listening and four types of questions—confirmation, new-information, attitude, and commitment questions—to guide the discussion.

Turn on video if possible and call on everyone at least once in your virtual meetings.

Manage disruptions; that is part of your role as chair.

Let me know how these suggestions work for your meetings, and please share your own best practices. We at AAL are always eager to help with your leadership, professional development, and strategic-planning needs in higher education and the academic health professions. Learn about our experts and see more of what we offer at [www.aalgroup.org](http://www.aalgroup.org).

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