

Moderating Large Group Meetings

Most collaborative sessions involve three to five people. However, there are occasions where it is useful to involve larger numbers in a single meeting. These include class lectures, general announcements, consensus building, and presentations.

When the participant count goes above ten, it's appropriate for the meeting moderator to take a few precautions to ensure that all participants enjoy a rich and robust meeting experience. This guide provides a systematic overview of the key actions required.

Planning Your Meeting

As with any meeting, you need to add structure as the number of participants grows. Large meetings require an agenda or program of some sort to drive them. Marratech meetings work the same way.

The whiteboard is where you communicate your agenda and other vital information. Every meeting should start with three whiteboard pages. The first page offers a welcome message with the meeting name, date, and start time. It assures participants that they've joined the right meeting. The second page lists good meeting etiquette and any other 'rules of the road'. The third page contains the actual agenda for your meeting. If your meeting includes a significant number of first-time users, you may want to place the etiquette page before the welcome page.

If your meeting will have multiple presenters, it's important that their whiteboard content occurs as a contiguous block of pages. The whiteboard stores its content by page name in alphabetical order. If you create a simple naming convention, so each presenter's content starts with a different letter or number, each presenter's pages will always stay together.

This also raises an important point for individual presentations. If, for example, you create content in PowerPoint and then bring it into the whiteboard from PDF, each page will have the name of the source file plus a page number at the end.

While the pages will have the correct sequence, it will be difficult to jump around the presentation during Q&A and at other times.

A better strategy is for each presenter to rename the pages in his or her presentation with a sequence number followed by a title or note.

This will also make the pages more useful to those who save the whiteboard for later review. An example of sequenced page names appears below. You assign these names by going to each page in turn and applying the Rename command from the Document menu. Be sure to save the whiteboard after renaming the pages.

00-Title
01-Agenda
02-YearInReview
03-GoalsForNextYear

The next presenter might start their pages with a different prefix, as in this example:

11-PlanningAssumptions
12-Risks
13-NetROI

These slides will always appear after the slides shown in the previous example.

Another strategy is to precede each slide with the initials of the presenter followed by a sequence number. While the slides will not be in meeting order sequence, this strategy requires less coordination with individual presenters.

Pre-Qualifying New Participants

First-time participants represent the greatest challenge to moderators of large group meetings. They are new to Marratech, its interaction with their hardware, and to Marratech meeting etiquette. You can overcome these shortcomings with a pre-meeting.



Using the pre-meeting

Use the pre-meeting to ensure that the new participant has the correct hardware and accessories. Current hardware requirements are available from the Marratech web site. You may want to consider the expected level of participation when assessing hardware.

If the participant will not need to send video or audio, there is no need for a web cam or headset. The computer's speakers should be sufficient.

Remember that all participants can always receive audio and video. For limited communications, the chat window works well. Participants who need to send audio and video need to meet a higher standard. They should always comply with our recommendations concerning headsets and web cams.

Use the pre-meeting as an opportunity to help new participants configure their client for the capabilities of their Internet connection. While video takes the most bandwidth, crystal-clear audio has the greatest impact on meeting experience. A good strategy is to downgrade video bandwidth until you achieve rich, clear audio. Note that some participants may not have enough bandwidth to send video.

Finally, emphasize the importance of good meeting etiquette. Marratech is a new experience and new users will be tempted to explore and experiment. Your large group meeting is not the right time or the right place for them to do this, so use your pre-meeting as an opportunity to introduce them to the many features of the user interface and to the preferred way to use those features in your meeting.

Setting Up

As with any large meeting in a traditional setting, it's important that you arrive early. When you reach the meeting server, your first action is to login. This gives you moderator privileges for your meeting room.

Your second step is to load whiteboard content. As mentioned above, you should have a welcome page, an etiquette page, and an agenda.

You should also encourage other presenters to arrive early. This enables them to load and test their pages or to resolve any conflicts in page names before the meeting starts.

The preloading of pages also offers a performance benefit. As presenters load their pages, Marratech caches the pages on each participant's computer. If this completes before a presenter begins speaking, the whiteboard will not be using any of the presenter's uplink bandwidth as the presenter start to talk, helping ensure crystal-clear audio from all presenters.

Trouble Shooting

In every large meeting, some participants may have equipment problems. For those with no outbound audio or video, this is largely limited to finding and joining the meeting. For participants with headsets and web cams, there are some common errors:

Users often launch Marratech before they connect their headsets and web cams to their computer. When this happens, Marratech will not find these peripherals. It will disable the microphone and web cam buttons in the interface and the user will not be able to find these devices in the Marratech 'Preferences' window even though the operating system preference windows will show them to be present and available. These user must leave the meeting, quit and re-launch the application.

Users sometimes forget to adjust the position of the microphone on their headset. Common symptoms include the sound of heavy breathing and distorted (or 'clipped') audio when the person speaks.

Both symptoms are the result of the user placing the microphone too close to the mouth.

For most headsets, position the microphone's boom at jaw level so the microphone is mid-way between the ear and the chin.

Should someone's voice be too soft, simply have the user move the microphone closer to his or her chin.



Dialing Out

When most of your invited guests have joined the meeting, you may need to dial out to those who will attend by voice only. To do this:

- Access the Viewer window.
- Click the left arrow button and the meeting server returns you to its home page.
- Click on the 'Dial out' link and the server responds with the dialing page. If you forgot to login, this step will fail and you will need to leave the meeting, login, and return to the meeting before continuing.
- Select your meeting room from the drop down list next to the 'Marratech meeting' label.
- Select your SIP service provider from the drop down list next to 'Line'.
- Enter the phone number of the person you want bring to your meeting. Each provider has its own way of entering the number. Broadvoice, for example, requires that you enter a one, the area code, the prefix, and the number as a single string of digits without spaces. Be sure to check with your provider for the correct procedure.
- Click on the 'Call' button to place your call. The server reports on the progress of your call and any error messages in the dialing page. When the called party answers, the server automatically adds them to your Marratech meeting.
- Continue adding outside parties as needed. When you are finished, you can return to the server home page by clicking on the 'Back' button.

Securing the Room

The location of your meeting and the sensitivity of the materials covered each affect the required level of security. While Marratech fully encrypts all meetings from end to end, it may be appropriate to lock your room to prevent others from joining. Windows and Linux moderators can use the 'Tools->Access Control->Lock Room' command while Mac OS moderators will use the 'Window->Access Control->Lock Room' command. To unlock your room, simply reverse the process.

If you find that unwanted guests joined your meeting before you locked the room, you can expel them with the 'kick' command. For Windows and Linux moderators, this is 'Tools->Access Control->Kick User' and for Mac OS moderators it is 'Window->Access Control->Kick User'. Marratech responds to this command with a list of participants. Select the participant to expel from the list and click on the 'Kick' button. Marratech then removes the participant from the meeting. Participants expelled from a locked room are unable to re-enter the room.

Note that you cannot dial out from a locked room. Place all outbound calls before you secure the room for your meeting.

Managing the Whiteboard

The whiteboard is the focal point of a large group meeting. For your meeting to be effective, it is important that everyone is on the same page and that the current page is what the presenter wants everyone to see.

Leading and Following

As your meeting gets underway, you need to ensure that you have the 'Lead Pages' icon checked. If you fail to do so, you will move onto the next page while other participants continue to see the original page.

Next, ensure that all participants have the 'Follow Pages' icon checked. As you move from the title page to your 'rules of the road' page, tell your audience which page they should now see. If they don't see it, it's a good indication that they may have deselected 'Follow Pages' and need to reselect it.

Finally, ensure that all participants other than the presenter have the 'Lead Pages' icon unchecked. If a participant forgets to do this, the next time they peek ahead to another page, everyone else in your meeting (yourself included) will see a message to the effect that 'user xxx is leading you to this page'.



This is embarrassing to the participant and disruptive to the meeting.

When you move between presenters, be sure that the new presenter checks 'Lead Pages' and the previous presenter unchecks the icon.

Annotating

The last note on whiteboard management concerns doodlers. Some people (even senior executives) insist on marking on whiteboard pages during a presentation. In some instances, this is desirable. If something on a slide is unclear, one person can add an annotation for the benefit of all.

In other cases, doodling can be disruptive. A good example is the participant who draws a stick figure for the sake of something to do. You can identify the guilty party by clicking on the selection icon and then clicking on the doodle. The 'owner' of the doodle appears in the margin at the bottom of the whiteboard.

Usually, it is sufficient that you send a private chat message to the guilty party.

Participating

Two key issues during a large meeting are the appropriate use of audio and video. In small meetings, both are on at all times. Large meetings require a degree of discretion.

Audio

There tends to be an inverse relationship between meeting size and interaction. As meeting size grows, the amount of interaction decreases. Yet, even large meetings have a need for Q&A sessions.

Marratech offers participants two ways to indicate questions to presenters. The first is the public chat window and the second is live audio. The chat window is always available, even to participants without a headset or web cam. Marratech appends each question to the participant's name, so follow-through is easy.

You can save the chat window contents to a text file for later review.

If all or most participants have headsets, you can accept questions via audio. This is often more effective than chat because many people have difficulty typing long or precise questions. Audio has no such limitation.

Large meetings raise the issue of order in the presentation of questions. If everyone asked a question at the same time, you would have chaos. In cases of limited bandwidth, where the presenter is the only party sending video, participants with questions can turn their video on to indicate that they have a question. When their question is answered, they can turn their video back off. In many circles, it is good etiquette for someone with a question to broadcast video while they are asking their question.

An alternate method is the whiteboard pointer tool. If a participant wants to ask a question, they select the pointer tool and then click in the whiteboard. All participants will see the pointer and the participant's name next to it. If there are many questions, you will see several pointers and names.

You should exercise caution when accepting questions via audio from a large group. Marratech meetings provide a separate channel of audio for each participant. This means that audio bandwidth in a meeting is cumulative. With too many people using audio at the same time, you can easily overtax slower connections such as T-1 and SDSL and end up with no audio at all for the users of these connections.

Marratech's default behavior is to start with audio and video off. Participants in large meetings should only activate their microphone when they are presenting or raising a question. At other times, they should leave it off.

You can tell if someone's microphone is on or 'open' because the name in his or her thumbnail appears red. To ensure a rich and robust meeting experience for all participants, you may need to emphasize this point during Q&A sessions.



Participants who use the iSight microphone should also be aware that there is a lag between the pressing of the Marratech microphone button and the processing of audio from the iSight.

Video

Unlike audio, video is not cumulative. The Marratech server software actively manages total video bandwidth within meeting room constraints.

The fact that everyone could send video does not mean that everyone should. As the number of users grows, the number of frames per second available to each user is reduced to keep the total bandwidth inside acceptable limits. At some point, this reduces everyone, including the presenter, to a motionless portrait.

A better strategy for large meetings is to limit video to the current presenter. This allows everyone to see the speaker in full motion, with facial expressions and gestures.

Following Up

At the end of your meeting, there is usually the matter of publishing minutes or otherwise distributing a record of the meeting. Marratech provides several options for this.

You can make a complete recording of the meeting and store it in a generally accessible place such as a server on your local area network. Since Marratech encrypts and secures all meeting content, you will need to provide your participants with the password that unlocks the file.

If you annotated each slide with the answers to participant questions, you may want to publish only the whiteboard pages. For some meetings, the original whiteboard, without annotation, may be sufficient.

If your meeting required formal minutes (in the traditional sense), Marratech can make life easier:

- Appoint a participant to take the minutes
- Switch his or her Marratech client to 'expert' mode.
- Close all windows except the whiteboard and the chat window.
- Resize the whiteboard so they can open a word processor window next to it. Use the whiteboard's magnification feature to reduce the size of the whiteboard page so it fits in the smaller window.
- Open the chat window and resize it to fit under the whiteboard window.

Now the person taking minutes can watch the presentation in the whiteboard, observe any questions or comments in the chat window, and make meeting notes all at the same time.

