

A Step-By-Step Guide to Conducting Successful Videoconferences

Before the Videoconference

Before the First Time

Practice with the Origination (clinic, home or school) and Destination site (healthcare provider) staff at least one day in advance. This gives you time to have your and their IT Department help if there are any technological issues. It also gives you time to make modifications to the room decorations, arrangement, and lighting at both sites.

Every Time

- Login five minutes early to download and install software updates.
- Origination sites should have the Destination site's phone number available for technical support.
- Have the alternative telephone conference number available if there are connectivity issues.
- Have a speakerphone available if needed along with the passcode needed to dial long-distance phone numbers.
- Destination site: Make customary reminder calls the day of or before the videoconference session as you would for a traditional face-to-face session. Confirm the technology the destination site will be using for the session – computer, tablet, smartphone, or conference phone.

Starting up the Videoconference

1. Turn on the electronics, plug into power supplies, and connect all cables for Ethernet, speakers, microphones, and speakerphones.
2. Turn on overhead, floor, and table lights.
3. Position floor and table lights to optimize lighting.
4. Close drapes, blinds, doors, and windows to improve lighting and privacy, and to decrease distractions.
5. Arrange chairs, tables, and other furniture to suit the videoconference. Remove any chairs or furniture that would block the camera.
6. Turn down or turn off loud air conditioners.
7. Cover shiny surfaces like polished tables in the foreground or whiteboards in the background.

8. Seat the participants so they all face the camera and display(s).
9. Place microphone in a central location (when applicable).
10. Log into the videoconference.

Once Connected

11. Adjust the camera, microphone and speaker.
 - a. Adjust the camera location, change the camera zoom, and adjust the camera angle to fit all the site participants at your site in the camera frame.
 - b. Let the other sites know if they are poorly framed, dark, or overexposed.
 - c. Confirm all participants can hear you by asking them to give a thumbs up. Adjust microphone sensitivity and position as needed.
 - d. Confirm that you can hear the other participants by giving a thumbs up when they ask you for confirmation.
 - e. Adjust the speaker volume to overcome any background noise. All participants at every site should sound equally loud and clear.
12. Troubleshoot a poor connection.
 - a. If the signal is poor with pixilated video or garbled audio tell the other participants you will disconnect to get a better connection. Then disconnect and reenter the conference.
 - b. If the signal remains poor, consider restarting the Internet modem and router. The system may take as long as five minutes to re-boot, so let the other participants know if you will do this.
 - c. Consider just using the telephone if remains poor or it is a short session.

Opening the Conference

13. Whoever will lead the session at the Destination site should then begin with a greeting and identify the meeting agenda. This ensures everyone has joined the correct conference.
14. The leader will begin introductions and instruct the other site to introduce the participants at each site in an arbitrary order. This will confirm all the participants were actually invited.
 - a. The order of speaking can be anything that eliminates confusion and silence. It can be alphabetical, geographical, or replicate the organizational structure. The goal is for everyone to have a chance to speak and the need for the host to prompt or give permission to the other participants to speak. Without a speaking order or prompts from the leader, many quieter participants may not offer contributions to the videoconference. You want to avoid situations where loud, talkative participants dominate the interaction.

- b. If there are connection delays caused by poor bandwidth or old computers at one or more sites, it becomes difficult for the participants at that site to contribute. When the participant at a slow site tries to speak after a pause in the conversation, another person at a faster site will have already begun talking. The result is two participants speaking at the same time. Usually they both stop talking, or they talk over each other. The session leader wants to encourage dialogue, so in these situations, the slow site should signal that he or she wants to make a contribution by raising a hand or object. Some videoconferencing software like Go to My Meeting and WebEx allow a participant to “raise their hand” electronically, but the leader must attend to this information on the screen.
15. When introductions are complete, the leader begins the session by either initiating the meeting agenda or by conducting a patient or parent interview.

Closing the Conference

16. Begin to close the session a few minutes before it has to end. This gives the participants a chance to say things that they may have been waiting to contribute to the group. If you have time, ask each site if they have anything else to add or any additional questions for the other parties.
17. Then move into a summary statement about the meeting and what was achieved. In a treatment session, review the treatment plan and key updates.
18. Arrange the follow up meeting.
19. Thank everyone for his or her participation.
20. Close the session with culturally appropriate social scripts and gestures.
21. The leader then disconnects all of the destination sites, unless they have already disconnected themselves.
22. Charge any battery-operated equipment including tablets, speakerphones, and microphones.
23. Restore the room, furniture, windows, and equipment to their normal state and arrangement.