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# **When meeting face-to-face is no longer an option**

*Re-examining alternatives in light of  
recent world events and economic trends*

*By Nancy Settle-Murphy*

# Phasing out the “live, in-person” in favor of “sometimes-live” and almost *always* remote

*Changing the way we view the best  
methods of collaboration*

## Business landscape in dramatic upheaval

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*As of early October, the  
Business Travel  
Coalition reports that:*

- 85% of companies are allowing travel with qualifications
  - 41% are “considerably” or “very significantly” more interested in technological alternatives like video or web conferencing
  - 9% of companies expect travelers to drive to destinations of under 500 miles considerably more often
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Before September 11, 2001, many companies had already prohibited all but “business-critical” travel to help bring expenses in line with plummeting revenues. Though many employees may have grumbled that such cutbacks were anathema to growing a business, most resigned themselves—for the time being—to conducting business via email, phone, and videoconferencing. But as soon as business picked up, they were determined to start racking up the frequent flyer miles in the name of business once again.

Today, many of those same employees just want to stay put, ensconced in their offices close to home (or in many cases, *at home*). While before they argued in favor of face-to-face meetings as an absolute necessity for building and cultivating relationships, they’re now searching for other ways to build the kind of “social capital” that face-to-face meetings create.

This paper explores the need for creating and communicating company policies related to business travel in the tragic aftermath of the events of September 11. It also provides managers with ideas for replacing face-to-face meetings through other means—some of which, if thoughtfully done, can accomplish surprisingly powerful results.

**When employees just say “no.”** In the weeks following the September 11 tragedies, many companies imposed short-term travel bans, beyond the earlier restrictions due to expense controls alone. In part, such bans were issued out of respect for employees and their families who feared for their safety. In some cases, restrictions were imposed to give companies an opportunity to decide what their travel policies will be once the bans are lifted.

In a recent *Wall Street Journal* article, managers from several companies were interviewed as to their business travel policies in light of the events of September 11. While some had not yet issued definitive statements, at least one company spokesperson suggested that if the job required travel to meet business goals, and if the employee opted not to travel, that person may need to be reassigned. Fair? Maybe

and maybe not. What's considered a prudent policy for one company may be regarded as "heartless" by another.

*We know intuitively that face-to-face interaction has value, but balancing that intelligently against other factors is a real challenge.*

## The need for clear guidelines and principles

Companies whose employees travel as a matter of routine need to create and communicate guiding principles by which managers and employees can live. Such principles can help managers and employees make tough decisions and evaluate the inevitable trade-offs related to business travel. They can also set expectations as to the likely implications and consequences of traveling or not traveling.

When creating guidelines and principles, senior managers should consider some of the following elements. Keep in mind both the short-term view as well as the longer-term perspective, once the emotions surrounding the events of September 11 are not quite as raw.

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*"Increasingly, sophisticated employers are relying on mobile communications and telecommuting to reduce the expense of business travel and to keep corporate activities going in critical times."*

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- What is the meaning of "business critical" and who defines it? Are there clear examples that can help cast some light on such an ambiguous phrase?
- What assumptions need to be tested regarding alternative ways to achieve certain business goals? i.e., Are you sure that your best client expects an in-person visit from his or her account team once a quarter as a precondition of continuing to purchase from your company? Or might there be other ways to cultivate the relationship?
- How long of a "grace period" can companies afford to give to those employees who can't realistically do their jobs without at least some travel? Should it depend on the individual, weighing a number of factors such as his or her job performance, the extent to which s/he has been affected by the recent tragedy, and family situation? Or should all employees live by the same guidelines and associated consequences?
- What recourse does a manager have for employees who refuse to travel? Does this same recourse apply equally to all employees and managers, regardless of title, level, pay scale, location, or job responsibilities? For example, does the administrative assistant who won't travel to support a customer seminar experience the same consequences as the senior marketing manager who won't fly to provide a keynote speech for the same seminar?
- What assistance will a company offer to employees by way of counseling or other remedies to help assuage concerns and fears before reassigning employees who refuse to travel (assuming reassignment is regarded as an option)?

- What investments will companies make as an alternative to face-to-face meetings? For example, will your company purchase state-of-the-art videoconferencing technology to allow people to meet face-to-face from afar? If so, will all employees have equal access, or will some departments be granted a disproportionate share of the available time and systems, due to the nature of their work, sense of urgency, geographic dispersion of participants, or some other reason?
- What guidelines can you provide to managers and teams as to which meeting options are most viable to achieve certain outcomes, under certain circumstances?

### Testing your assumptions about the need for face-to-face

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*The Business Travel Coalition predicts that business-travel volume in January 2002 will be less than 80% of what it was before the Sept. 11 attacks*

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When considering the need for face-to-face meetings, encourage managers and employees to ask themselves how else they can accomplish the same business goals. The initial response—and many times the *right* response—will be: “There is simply no substitute for face-to-face interaction.”

For example, a manufacturing vice president who needs to announce a plant closing to 2,000 employees a continent away may argue that there is no viable option to delivering the news personally. Some may argue that a conference call followed by a sensitive email may do just as well. However, the impersonal delivery of such shattering news may have grave consequences, measured by the loss of positive public image, sabotage of property, and lower morale for the remaining employees.

*“Factual, productivity-oriented tasks benefit greatly from technology. But where emotions are at stake—when people must resolve conflicts—people need real-time communication that conveys emotion.”<sup>1</sup>*

Various business units and departments need to ask themselves which objectives can *not* be met without face-to-face meetings, and why not. Challenge assumptions and push boundaries. Brainstorm alternatives and test them with others outside of the group. Examples:

*Initial assumption:* Our project team needs to work face-to-face at least once a month to iron out differences and create shared solutions.

*New revelation:* By diligently following a new process for reporting issues via email and web, and by brainstorming solutions via weekly facilitated con calls, our team can easily forego the monthly meetings in favor of quarterly meetings.

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<sup>1</sup> Ray Ozzie, Lotus Notes creator, quoted in *The Wall Street Journal* on September 25, 2001

*Initial assumption:* The account team must present the proposal to the client in person to secure a purchase order.

*New revelation:* While the client would *like* the account team to present the proposal in person, s/he would gladly exchange the personal visit for a cogently-written proposal that includes a persuasive business case, making it easier to sell the proposal upwards to senior management.

*Initial assumption:* Our group has a number of issues and conflicts that are not being resolved adequately through remote means. We need to get together to thrash things out, because the only way we know we're really being honest with each other is if we can *see* each other.

*New revelation:* There may be a number of steps your group can take that have not yet been tried, though you may eventually end up validating your initial assumption. First, find out why your current methods of conflict resolution are not doing the job. Are the right people involved? Too many? Not enough? Do some members fear that honesty will be punished in some way? If nonverbal communication is a critical missing piece, consider videoconferencing as an option. If your company has not made a sufficient investment in high-quality equipment, this may be a great time to make a compelling business case.

*Initial assumption:* Our new management team has just been appointed, and our new goals and success metrics have just been outlined. We are heavily dependent on each other if the team is to succeed, and we have little time in which to accomplish our goals. Team members come from several different locations and disciplines. Most of us have never met. We need to meet face-to-face to get to know each other and to begin to build trust.

*Validation of assumption:* You're probably right. Meeting face-to-face will be essential to helping this new team to coalesce quickly. However, make sure that ongoing team communications and principles for conflict resolution are some of the key topics you discuss in person.

## Exploring all viable options

Assuming you conclude that face-to-face meetings are just not possible right now, what are some viable options to consider? It depends on many variables, such as the desired outcomes, how high the stakes, participants and their perceptions and predispositions, familiarity participants have with each other, geographic locations and cultural differences.

Consider these options to either replace face-to-face meetings, or as a means to augment less frequent face-to-face meetings, perhaps with fewer participants:

**Conference calls**, with deliberate planning and excellent facilitation: If your group must rely more heavily than before on telephone communications, make

sure the calls are thoughtfully planned. Questions to answer in the planning of conference calls include:

- What are the objectives of the call? (i.e., decision-making, issue reporting, information exchange, etc.) Are objectives likely to change?
- Who should participate in regular calls? Are delegates allowed?
- Can someone participate “half-way?” For example, is it acceptable for members to read and send email during the call, or take other calls if they come in? If so, under what circumstances?
- If different national cultures are involved, have we established standards around the use of English (e.g. avoid use of idioms and local slang), need for translation time, desire to keep responses concise and brief)
- What time and for how long should we schedule the call? Are the times equally convenient (or inconvenient) for all participants? Can we consider shifting the time every other week or every month, to accommodate all equally?
- Who decides what the agenda topics will be? How are topics communicated? By whom? Who has input?
- What preparation is required to ensure that participants make the best use of phone time? Who makes sure that everyone knows what s/he must do to prepare? What if some people come prepared and others don't?
- Who facilitates the call? What are our principles regarding staying on track?
- Does someone capture decisions reached, minutes, etc.? If so, who? Do we rotate this responsibility?
- Do we need to establish additional mechanisms by which the team can share ideas, provide input, etc. between calls? Is e-mail enough, or do we need to think about some sort of chat forum or bulletin board posting?
- Has someone secured a dial-in number that everyone has in advance? Do we have sufficient ports to accommodate everyone?

***Videoconferencing***, especially for times when witnessing nonverbal communications will contribute to the groups' overall objectives:

- Repeat the checklist above, plus---
- Do all participants have reasonable access to good videoconferencing equipment?

- ☑ Have we created an agenda and allocated the appropriate time to meet our objectives, while making the best use of this technology? (For example, it probably makes sense to have people review any relevant material in advance, and then use the videoconference time to hash out issues, air differences or brainstorm solutions, versus using the time to simply present material.)
- ☑ If presentations are to be made, how? For example, will they be presented on-camera or viewed by each participant via laptop? This will affect the planning and design of the presentation as well as the agenda.
- ☑ Does the technology allow for smooth, steady communications, or does time need to be built in for long pauses between speakers?
- ☑ Can we avoid scheduling videoconferences around meals? The sight and sound of people drinking and chewing can be distracting at best
- ☑ Who's responsible for booking the systems and conference room?

**Email** can help foster and sustain open communications, if used judiciously. Questions to answer might include:

- ☑ Who's on the "to" list, and who gets cc'd? Under what circumstances? What are the implications? (For example, those on the "to" list need to provide a response; those on the cc: need not.)
- ☑ Should we assign a convention to connote relative sense of urgency? (Example: A "U" in the subject line indicates urgent, an "A" indicates some sort of action is required; and an "I" signifies "FYI only.")
- ☑ Have we agreed on a standard for turnaround time? In what cases? Do some people in the group need a faster turnaround time than others? (For example, do our colleagues in Asia need a quicker response so that they can get the answer they need by the next day?)
- ☑ Do we have standards regarding brevity, accuracy and clarity? (This is especially important when the group includes non-native English speakers.)
- ☑ Have we agreed when email is or is not appropriate? (Example: We don't use email publicly to "call" each other on mistakes or problems. If we must, we confine our distribution list to as few people as possible.)
- ☑ Are there any constraints in the size of attachments we can send? (For example, do we zip all files over 2 Mb?)

**Web meetings**, especially when real-time interaction is important and anonymity may be desired:

- ☑ See the checklist for conference calls, plus—
- ☑ Does everyone have equal access to the technology? Is dial-in access speed acceptable for all participants?
- ☑ Have we agreed on principles regarding timing, agenda flow, facilitation of questions and answers, ownership of minutes, and other key elements?
- ☑ Will we use the phone as well as keypads to communicate?
- ☑ Have we established whether questions will be submitted anonymously, or openly? Will we determine this for each meeting?
- ☑ Has everyone received any review material far in advance of the session, so participants can queue up whatever they need in advance?

*Real-time data conferencing and electronic meeting systems with audio/video and text and graphics support can be powerful ways to share information, discuss and brainstorm and make group decisions. To what extent technology such as this can be used productively depends on a number of variables. Among them: number and role of participants, company culture, access to and comfort in using technology, degree of proper preparation, and overall effectiveness of the groups' ability to collaborate.*

## Making the best of face-to-face meetings

Face-to-face meetings will certainly still be needed. To make sure that such meetings deliver the desired outcomes, answer the following questions during the planning phase to ensure the greatest meeting ROI:

- ☑ Who most needs to meet face to face? What are the implications of including some and excluding others?
- ☑ Do some need to meet face-to-face with greater frequency than others?
- ☑ Is it possible to rotate staff or team members who attend face-to-face meetings, so that all may benefit?
- ☑ Have we allocated the appropriate amount of time, given the objectives, the stakes, the participants involved, and the general state of affairs? (For example, if this is a critical relationship to build or repair, make sure you allocate time for social exchanges in addition to the required business meetings.)
- ☑ What preparation will help participants to make the best use of their time together? Are there any documents that can be reviewed in advance, to

allow participants to maximize face to-to-face time together?

- Is everyone clear on all of the objectives? Are there any objectives that need to be surfaced in advance, to allow everyone time to prepare?
- Can we alternate meeting times and venues to accommodate everyone? Or is deferring to one person or another important in terms of status, relationship, or some other factor?
- Have we thought about how we can involve those who could not be present? For example, is it possible for them to participate via the phone at any point? Can they help with the planning? Will they receive a meeting summary?

### Meetings with a purpose in mind

Many teams find it helpful to create matrices to guide them as to what meeting methods they will use as a default, depending on circumstances and objectives. For example:

Objective	Communication method	Frequency	Leader	Details
Status reports	Con calls and 1-page status reports	Weekly as a rule	John L.	Certain project phases may require daily communication
Project planning and revisions	Face-to-face with one representative from each discipline or function	Quarterly	Anne P.	Input required from all participants; con call to be held during last two hours for all
Conflict resolution (minor)	Face-to-face or telephone among affected people is preferred  Email among affected people if conversation not possible	As needed	Team member who perceives a problem or conflict will or does exist	
Conflict resolution (major)	Same as above, except that email should be used only if absolutely necessary	As needed	See above	Senior team leader may initiate action much of the time
	Con calls and web meeting with entire team	Monthly	Anne P.	Two consecutive half-days, alternating time
	Face-to-face with all team members	Annually	Anne P.	Plan for four working days

## Summary

In the wake of the September 11 terrorist attacks, coupled with a rapidly softening economy, more companies than ever before are exploring alternatives to face-to-face meetings that require air travel.

Organizations need to be clear as to what objectives really mandate the need for face-to-face meetings, and which can be met through alternative methods. Principles and guidelines regarding “business critical” travel will help managers apply rules and policies consistently across the company.

While face-to-face will always be the preferred choice for creating new relationships and repairing those that have become fragile, other options—if used thoughtfully and with careful planning—can be surprisingly effective in achieving a wide range of objectives.



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