Remote meetings made easy: Good practices to keep in mind

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Abstract

One core medical writing skill is effectively communicating with the teams that will help us author our documents. With remote working playing an increasingly important role in our workforce, medical writers must adapt to this new reality. This article offers guidance for medical writers to run effective remote meetings, including a checklist with suggestions of what to do before, during, and after these calls.

Introduction

Medical writing is a collaborative effort. Many of the documents we write require cross-functional input and discussion and, thus, medical writers need to be comfortable with leading and managing a variety of multi-disciplinary meetings on a regular basis, including kick-off meetings, discussion of pending or conflicting input, alignment of key messages, among others. Moreover, medical writers often work with teams located all over the world, and it may not be realistic to conduct all meetings face to face. It is, therefore, not merely a convenience, but a necessity, for medical writers to be comfortable with leading remote meetings to effectively communicate with the team supporting the development of their documents. Fortunately, the recent development of fast and reliable remote communication, screensharing, and filesharing methods (now speeded up by the COVID-19 pandemic) has allowed for a lot of work to be done quickly, efficiently, and remotely.

Nevertheless, leading such meetings can be an intimidating experience, even for seasoned writers, so proper planning is key to make this a smoother experience. This article includes several suggestions on how to efficiently prepare, conduct, and follow up on remote meetings.

Before the meeting

Effective meeting preparation will help not only the medical writer, but the whole team, allowing everyone to align on expectations, to organize, and to ensure a productive discussion. A list of suggested steps to prepare a successful meeting is shown in Table 1.

One way to ensure successful planning is to adapt the technique of 5Ws 1H to this task: *who, when, what, why, where, and how*.

Who and when

It is important to identify which attendees are essential for each meeting, so that the relevant team functions for a particular agenda are present. Furthermore, the decision maker(s) should be identified for each meeting and their attendance guaranteed, as they are key to the resolution of any conflicts and can provide direction to the other attendees.

It is also important to confirm which virtual platform should be used in case you are meeting with external personnel (e.g. contractor writer meeting with a sponsor team). If possible, the sponsor's platform of choice should be used.

What and why

When planning a meeting, first consider its scope. It is important to confirm which discussion topics require a meeting, and which can be resolved via a different method (e.g. email). A meeting may not be the most efficient solution to every problem, and an excessive number of meetings can be difficult to manage and attend. Prepare an agenda that clarifies the scope of the meeting, the topics that are going to be discussed, and what is expected of you (the medical writer) and of the other team members. These topics vary depending on the type of meeting taking place, but here are some common items addressed in typical medical writing meetings:

- Kick-off meetings:
  - The scope of work
  - The team and roles/expectations for each member
  - How the document will be drafted, reviewed, approved, and published
  - How the medical writer will communicate and collaborate with the team
  - Timelines
- Comment resolution meetings:
  - What are the comments that will require discussion (usually, comments that are considered major in relevance and require cross-functional discussion) and their order/priority?
  - Key line functions should be identified, and representatives should be considered mandatory attendees.
- Data interpretation meetings:
  - What are the key messages the document will communicate, based on the data available?
  - Key line functions should be identified, and representatives should be considered mandatory attendees.

Make sure you allot sufficient time to discuss all the topics planned for the meeting, that the team is available during this time, and that the planned overall duration of the meeting is appropriate for its scope. If a given line function can only attend part of the meeting, consider addressing specific topics that require their input while the function expert is available.

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Where and how

Based on the team list and their availability, the selected virtual platform, and with a meeting agenda and time plan ready, you can now schedule the call with the team. When preparing an email invitation, make sure the virtual platform link is clearly visible, and important instructions for successfully logging in are shown. Keep track of who accepted and declined the call and make

sure mandatory attendees (or assigned backups) confirm their presence.

Other actions to take when preparing a call

On the day of the call, make sure you have the right environment and technical conditions to run the meeting, and aim to remove or mitigate any potential sources of distraction, as much as possible (detail in Table 1).

During the meeting

As a medical writer collaborating with sponsor teams, you will likely be the lead for document-based meetings. Therefore, the other participants will rely on you to follow the agenda, initiate, and mediate the discussion.

A list of suggested steps to keep in mind while leading a meeting is presented in Table 2. In addition, there are some key ideas on how to maintain the discussion flow:

1. **Set the rules:** During your presentation, be clear about your role in the meeting and how everyone should participate in the discussion. Throughout the meeting, continue to guide the team and ensure that they are kept on-topic.
2. **Be diplomatic:** Not all teams are aligned in their strategy and there may be different opinions on how to approach one question. If you are leading the group discussion, make sure you deal with these differences sensibly and effectively towards a common strategy. Use your knowledge of the project and judgment to engage the team in productive discussions.
3. **Be proactive:** Medical writers are experts in communication and in creating documents that are fit for purpose. You can propose solutions to conflicting comments or advise the team on the best approach to develop a document. A proactive attitude is appreciated and helps develop a trusting working relationship with your team.
4. **Appreciate the team's time and effort:** Do not forget to thank the team for their time and shared knowledge during the meeting. As part of a collaborative project, ensure that everyone is comfortable with the key decisions and resolutions, and make yourself available to clarify any additional queries, if needed.

The business etiquette of face-to-face meetings still applies in a remote meeting. Professional demeanour should be kept by all attendees, and interruptions or disrupting behaviour should be avoided. When leading remote meetings, it is important to establish and maintain a productive and efficient discussion.

Remember that, as a medical writer, you are primarily a communicator. Leading remote meetings with experts from different areas and backgrounds can be challenging, even for experienced medical writers. To be successful, you need to ensure you communicate your message in a clear, assertive, and respectful way.

After the meeting

A list of suggested steps to keep in mind after you lead a meeting is presented in Table 3.

The most important action to take after a meeting is to write down and share a summary of what has been discussed, including:

- Items that have been resolved, i.e. decisions.
- Action points, i.e. what needs to be followed up by attendees (and how).

This information should be shared with the team as soon as possible after the meeting, to ensure that all relevant team members are aligned, and pending items are resolved efficiently.

Table 1. Checklist: What to do before a remote meeting

Actions to take BEFORE starting the meeting		Check		Check
Establish key contact(s) from the individuals outside your organisation who are expected to attend	If applicable, establish contact with a key person who will help you obtain the list of attendees, possible times for the call, and help following up in case mandatory attendees are unavailable to attend the meeting or miss it.	☐	Propose a day(s)/time(s) for the meeting (if not already set by project timelines).	☐
	Obtain a list of attendees: for each attendee, request name, email contact, line function, time zone, and confirm if mandatory/optional attendance. • If applicable, identify key decision makers, who will be key to the resolution of conflicts, depending on their field of expertise.	☐	Confirm virtual platform that will be used, and that all attendees (including the organiser, if applicable) have access and are able to use it.	☐
			If you plan to record the meeting, inform the key contact(s) in advance.	☐
Prepare meeting agenda	Define meeting rationale, objective, and list of topics by order of discussion.	☐	Establish a meeting duration that allows for all topics in the agenda to be discussed, or split the agenda across more than one meeting, if necessary.	☐
	If multiple topics, recommended to set a duration for each. For longer meetings, include breaks in the agenda. • It is recommended to reserve more time for topics that expect a cross-functional discussion, while straightforward sections can be streamlined.	☐		
Schedule the meeting	If you have access to the attendees' schedules, use it to schedule the meeting in the best possible time, keeping in mind different time zones and key attendees.	☐	Keep track of the attendees who accepted the meeting. If a mandatory attendee declines, confirm if a backup can attend on their behalf.	☐
	In the invitation, include the meeting agenda and the link to access the meeting, along with relevant instructions.	☐		
Prepare your room and space	Ensure you are in a calm environment, properly lit, silent, and with an appropriate background (you can virtually change your background in several platforms).	☐	Open and prepare all relevant documents so that you do not waste time during the meeting searching for those items.	☐
	Dress appropriately for the meeting.	☐	If you are screensharing, clean your desktop and only leave documents and applications relevant to the meeting open. Do not show any out-of-scope materials to avoid inadvertent disclosure of information.	☐
	Avoid having items near you that may be distracting (e.g. mobile phone).	☐		
	If possible, have a colleague take notes for you in addition to your notes.	☐		
Perform a test meeting (if necessary)	Check if your microphone and webcam work properly.	☐	If the platform is new to you, reserve some time before the meeting to understand how it works (e.g. muting options, screensharing, accepting attendees, recording).	☐

Table 2. Checklist: What to do during a remote meeting

Actions to take DURING the meeting		Check		Check
Present yourself properly	Be punctual and stick to the planned time.	☐	Speak slowly, cordially, and assertively. Use the mute function when you are not actively speaking.	☐
	Turn on your webcam meeting and speak to the camera. It is important to position the webcam properly to ensure your face is adequately captured.	☐	Avoid eating or using distracting objects (e.g. pen clicking).	☐
Initiate the meeting	You can leave some time to let the attendees join.	☐	If the meeting is intended to be recorded, inform the attendees before you start recording.	☐
	Make sure key attendees are present and follow-up if not.	☐	Introduce yourself and present the objective of the meeting and the topics that will be discussed. You can share the agenda, even if you have sent it to the attendees before. If applicable, the planned duration for each topic should also be shared and tracked during the meeting.	☐
	For large meetings (>10 attendees), you can mute the attendees when they join, to avoid excessive noise.	☐		
Establish discussion flow	If you are leading a presentation: set up periods for group discussion.	☐	Ideally, take notes of the discussion and conclusions reached in full view of the group.	☐
	If possible, have someone else at the meeting to keep track of the questions/suggestions written in the platform chat.	☐	If an answer/consensus cannot be reached during the meeting: • If a decision maker is identified, request their final decision on the topic. • If no decision maker is identified, offer to follow up after the meeting, and move on to the next topic.	☐
	When leading a meeting that requires group discussion: moderate the discussion, ensuring it does not go off topic and sticks to the planned timing. Once a resolution is met, reiterate the decision to the attendees to make sure it was well understood.	☐		
Keep track of attendees	Some platforms capture the attendees who join the meeting. If not, keep track of the attendees manually.	☐		
Wrap up the meeting	Summarise the key conclusions or resolutions agreed to during the meeting.	☐	Summarise next steps, if applicable.	☐
	Summarise any items that require follow-up outside the meeting, and if relevant, how they will be resolved (e.g. second meeting, email).	☐	Confirm if there are no additional questions from the group.	☐
			Thank the attendees for their contribution.	☐

Table 3. Checklist: What to do after a remote meeting

Actions to take AFTER the meeting		Check		Check
Write and share the meeting summary/minutes	Confirm with the team the best way to share the summary of discussion. Formal meeting minutes may not be necessary, but written summaries are important to keep track of the discussion, allow attendees who could not attend to catch up, and ensure alignment	☐	Summarise any action items to follow-up after the meeting and if relevant, how they will be resolved (e.g. additional meeting, email) and highlight any action items for specific attendees. If an additional meeting is required, set it up after sharing the minutes.	☐
	Summarise in writing the discussion by topics and any high-level conclusions/resolutions reached.	☐	Share the meeting summary/minutes with the attendees.	☐

You can choose the most appropriate way to share this summary (from an informal email to formal meeting minutes), based on the type of meeting and any arrangements agreed with the team.

Summary

Leading meetings with cross-functional teams is routine for a medical writer. Doing this remotely can be challenging and stressful, but with proper planning, even the most complex meetings can be run effectively.

Our skills as communicators must shine through, even remotely, and medical writers can bring much value to the team discussions through moderation as well as consulting as medical writers can offer advice and guidance to resolve comments and propose solutions that will improve the quality of the documents being written.

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The opinions expressed in this article are the authors' own and not necessarily shared by their employer or EMWA.

Disclosures and conflicts of interest

The authors declare no conflicts of interest.

Further reading

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