

Virtual Meetings Introduce a New Form of Etiquette

If you ask business credit professionals about their work environment, the majority will likely describe an office setting equipped with desks, computers, landlines and other tools often found in an office building. Last year, the COVID-19 pandemic turned the tables on what a standard office environment is, leaving many scrambled to create new workspaces in their homes, albeit lacking the usual office resources. An abrupt transition from a desk to a kitchen table and/or strong internet connections to spotty connections can be complicated, yet perhaps the most challenging change is the way credit professionals communicate with their employers, colleagues and customers.

Leaving their previous office settings meant credit professionals could no longer stop by another's office to ask a question or host/attend an in-person meeting in the conference room. Phone calls and emails were the next natural steps toward maintaining constant communication, but today's technological advances also allowed companies to explore the concept of virtual meetings through platforms such as Skype, Zoom, Microsoft Teams and more. In a recent NACM survey, more than half of the respondents said they implemented and used new technology, such as these platforms, since the onset of the pandemic that they didn't use prior to COVID-19.

However, just because the work environment changes doesn't mean professionals can put proper etiquette on hold. In April 2020, U.S. News & World Report discussed "the do's and don'ts of virtual meetings" to teach companies how etiquette changes during the transition from working in an office space to working from home.

Being on Time Means You're Late

Although the world has hit many technological strides, there is always room for error. Before the meeting begins, attendees will find it beneficial to set up any of the necessary equipment early, e.g., computers, internet, headphones, etc. The U.S. News & World Report article recommends logging in to the video platform at least five minutes prior to the meeting to ensure everything is working properly, in turn, also showing courtesy to the meeting's host and other attendees.

"If time is money, then by arriving five minutes late you've just stolen something of value from the other person, which is not a great way to start any important business negotiation," wrote the author of an article for Cydcor outsourced sales services. "The other person feels like they've already given you something, so they're not going to be as likely to give you more."

Corporate Credit Manager D'Ann Johnson, CCE, said while no one can avoid every technical issue, doing a test ensures that the majority of issues can be worked through before having a waiting and captive audience. Depending upon the presentation or the information, she said, people may sign off or sign off early because of delays due to an overlap for another meeting or a call that takes precedence.

In addition to weakening the late attendee's position, being late may give the host and other attendees the idea that the late party lacks integrity, respect and reliability. Therefore, barring a real emergency, virtual meeting attendees must arrive early.

Sight and Sound

Think back to the days when departments had in-person meetings. Whether in an office or a conference room, attendees gathered around in their seats for a face-to-face discussion. Today, these discussions are more likely face-to-video-to-face interactions. Although questions of where the meeting will be held

and whether there are enough seats for everyone are no longer issues, virtual meetings introduce changes to how one sees and hears others.

Justin Anovick, chief product officer of digital experience platform provider Episerver, told U.S. News & World Report that a common mistake users make involves lighting. For example, setting up a computer near a window may cause problems with lighting, making it difficult for other meeting participants to see the attendee. The same can be said if the attendee sets up somewhere dark such as a basement. It is proper etiquette that individuals attend their virtual meeting in a space with adequate lighting, therefore, maintaining a form of face-to-face interaction.

Sound also comes into play as attendees have the option to mute themselves or even the entire meeting. Tim Ihlefeld, president and CEO of Harqen, a company that provides digital interviewing technology, said in the aforementioned article that just because an attendee thinks they're quiet doesn't rule out the possibility of ambient noise.

"When you're on these conferences and you're not talking, it's very, very helpful to put yourself on mute," Ihlefeld said. The muffled noise of an air conditioning or heating unit, or the thumping of a washer or dryer can easily become an instant distraction.

"Even if you are working in an office setting, any background noise or conversation can be picked up and cause interference with the speakers or overshadow what is being said," Johnson added. "Additionally, I've been on calls where someone is shuffling papers close to their microphone without realizing that the sound is being broadcast to the attendees."

With such distractions aside, credit professionals can lead and attend successful virtual meetings.

—Andrew Michaels, editorial associate