Video Best Practices and Etiquette

Videoconferencing Etiquette

Videoconferencing, by its nature, is a social activity. As with any social activity, there are acceptable as well as expected behaviors that accompany it. Some of these behaviors are the result of culture or the environment whereas some may be said to reflect "common sense". Of course, there is also a range of definition as to what is "acceptable", " unacceptable", "desirable" and/or "expected" based on individual interpretation and temperament. Finally, when compared to other well-established social activities that combine people with technology (e.g., talking on the telephone, watching a movie in a public theatre, driving a car), videoconferencing has not been around as long or had as much exposure. This combination of conditions results in the fact that videoconferencing "etiquette" is certainly not "carved in stone". However, there are some basic behaviors that will improve your own videoconferencing experience as well as that of the people you are conferencing with:

Testing, testing, 1, 2, 3…

Perhaps the most overlooked experience-enhancing behavior in a videoconference is simply to pay some attention to how others will be seeing and hearing you. In videoconferencing, much of the experience at one end is affected by conditions at the other. Most videoconferencing clients include a "self view" window. This lets you see how you appear to the remote end — whether or not you are completely viewable on camera, if there are distractions in the background, whether you are looking straight forward at the remote caller and not "gazing down from above" or "peering up from below". Even if the self-view window is not going to be kept up during the call, it's a good idea to preview your image in the window and adjust accordingly prior to the call. Unfortunately, this doesn't work for adjusting audio since your local audio is almost always suppressed from "feeding back" to you in local mode or even most test modes. In this case, testing and adjusting with a live call before a meeting begins or taking a few minutes to test and adjust at the start of a call is strongly recommended. Once a call is in progress, many people seem to tolerate poor audio or video conditions, not wanting to interrupt the conversational flow or simply because they figure it must be something "at their end". A short audio/video "rehearsal" is well worth the time spent as it contributes to making the technology as transparent as possible and enables comfortable, effective and rich communication.

Leaving well enough alone…

Once adjustments have been made at each end to produce optimal call conditions, perhaps the most important advice is to converse naturally and make as few additional adjustments as possible. True, some adjustments may be necessary in response to environmental changes (lights are turned on/off, background noise increases). However, unnecessary "twiddling" of audio or video can have very distracting results. For example, leaning forward and adjusting a desktop camera at your local end will produce the dreaded "giant palm monster" effect at the remote end, who see friendly faces of acceptable proportions replaced by a far-too-intimate view of all or

parts of a hand. Also, if limited range or uni-directional microphones are being used, excessive movement or position shifting at the local end will produce audio break-up, swells and fades at the receiving end.

Are you still with me?

Once your camera and incoming view window have been correctly positioned so that "eye contact" has been established between you and the remote site, you should remain focused in that direction. Shifts in attention such as looking out a window, looking at other applications on the computer screen, "multi-tasking" with other work in your office, have the same effect as not looking someone in the eye when talking to them in person. It's important to realize that videoconferencing is much more like an in person exchange than a telephone call — body language and facial expression count!

Talking out of turn…

As with any in-person meeting, stray noises and side conversations within a videoconference distract from the primary conversation. This can complicate point-to-point meetings and becomes even more noticeable in multi-point meetings. It seems to be easier for participants to forget that they are truly part of a group conversation since the meeting room is virtual rather than physical. Side conversations at remote sites seem to spring up more readily than they would if everyone were in the same actual room. The microphones and speakers necessary for sending/receiving audio complicate matters further in that they do not differentiate between relevant and irrelevant sounds. They will readily pick up any conversation that is taking place near them and send it along. They will also just as happily pick up and transmit a sneeze with as much sound quality as a well-intentioned remark. Given these "imperfections" with technology (and with people!), it is good practice to mute your own audio when you are not speaking. In a point-to-point conversation, this isn't as necessary and may actually result in unnatural pauses in the conversation as muting at either end is turned on or off. However, it is useful in situations where audio may be poor at either end and can be used to minimize the effects of the audio problem on the overall conversation. In a multi-point conference, muting your local audio by default and unmuting only when you want to speak is almost always a good idea. This is especially relevant in the case of a voice-activated MCU since capturing the conference audio will also result in capturing the conference video. Any "side action" at your site will then be displayed along with any "side noise". Think about it - you may not want everyone seeing your facial expression as you dissolve in a fit of coughing, or watching you tumble oh-so-gracefully over the chair that you just knocked down!

Wow! Where'd you get that shirt?

Once you minimize audio distractions, it's time to think about minimizing video distractions. How and how far to go about doing this is a topic of some debate. "Traditional" videoconferencing has paid significant attention to proper lighting, room aesthetics, and attire, particularly in "board room" or group settings. This is a sensible approach to a technology that relies on cameras and monitors to create the conversational environment. Such "production" aspects are similar to those that are considered when producing high quality television and video

presentations. These are especially applicable in preparing a conference room or a classroom for group use (see "Developing a Productive Videoconferencing Room " in the Related Topics section.) However, if conferencing is going to take place on a regular (maybe daily) and unplanned basis from desktops located in individuals' offices or homes, the acceptable degree of "sensible preparation" becomes less clear. If communication via videoconferencing becomes as commonplace as using the telephone, what will our norms for video etiquette be? Will we have to stop wearing favorite clothes if they have complicated patterns or loud colors, in case we get a call that day? Will we have to re-engineer lighting in our homes and offices, or setup "video friendly" areas to take all of our calls? What if we're mobile — get out of the sun? Step into a "video phone booth"? The answers to these questions are likely to change as the "human protocol" for videoconferencing evolves and as the technology becomes more capable of simulating "reality". During this evolution, it's important to consider what does and doesn't work well at any given time and in any given situation to ensure that you are making informed choices.

We're all in this together!

A final subtle but very important point of video etiquette is that, when you are in a videoconference enabled meeting, though participants are located in physically different places, it is truly a "real" meeting! At first pass, this means things like "you should be on time", "you should pay attention", "you should make sure everyone has the same information going into the meeting", "you should bring enough materials for everyone". In the case of a multipoint meeting, these considerations are more complicated in delivery but compounded in importance. For example, if hard copy materials will be used in the meeting, they should be sent to all locations ahead of time (not unlike preparing for a teleconference). If printouts will be made from electronic material presented during the meeting, you should be sure that all sites have the capability to print the materials. If particular local objects or room locations will be shown during a meeting, care should be taken ahead of time to ensure that camera views of these are available for remote participants.

Can I have some of that too?

A couple of other considerations are a little less obvious but really do make a difference, particularly in multi-point meetings when groups of people have been brought together at each of the participating sites. The first is that information which is specific to each local site (e.g., where the restrooms are, where to find a phone) may need to be distributed to those that are at the local site but isn't relevant to remote sites. Distribution of this information should be handled locally via pre-meeting communication, local handouts, or prior to the start of the meeting with local audio muted. In addition to this, if amenities differ from site to site, care should be taken to minimize group exposure to the differences in amenities. (In other words, if bagels and coffee are available at one site but not at another, it would be most polite to eat off camera!) Better yet, care should be taken to ensure that amenities are equal. Remember, it really is one meeting!