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# PROFESSIONAL READING



*Lead2021: The New Playbook for Executive Leaders*

## Keys to Managing Your Board—Without the Boardroom

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Managing a remote board requires a streamlined approach to virtual meetings that involves more pre-work, limits on presentations, and strategies to keep members engaged. Two experts offer their insights on how to make it work.

Like almost everything else this past year, board management has changed. Board members sitting around a long table in a room somewhere—having flown in from all parts of the country and even the world—seems like a quaint relic from another era. Boards have made the shift to meeting remotely, and CEOs have learned to manage their work differently. Even after the pandemic subsides, the lessons learned will provide new flexibility for association executives in the future.

So, what are the best ways to manage a remote board? Here’s advice from two experts in the field.

### Streamlined Meetings

First, recognize that everyone has virtual meeting fatigue at this point, says Lowell Aplebaum, FASAE, CAE, CEO of the association consultancy Vista Cova, which focuses on group facilitation. People learn and engage better in experiential formats and not in passive ones, he says. If a board meeting is mainly report-outs on Zoom, “you’re going to have people go numb within 10 minutes.”

Shorter meetings are one way to combat Zoom burnout, says Paul Lockhart, vice president of sales at Passageways, a provider of virtual meeting technology. To make virtual meetings effective and productive, Lockhart recommends about 40 minutes of engagement followed by a 10- to 20-minute break, rather than trying to replicate three- to four-hour board meetings online.

Aplebaum and Lockhart offer these tips for streamlining virtual meetings:

- Eliminate or at least condense presentations. Send PowerPoint presentations and other documents out in advance to keep engagement, collaboration, and alignment high. That way, Lockhart says, when the CEO starts the meeting, everyone is prepared and has had a chance to review all the materials and ask clarifying questions in advance, which leads to better engagement and focused decision making.

- Present a short introductory video by the CEO. This can provide quick perspective on the information board members get before the meeting. The CEO can tell the story about the documents’ purpose and highlight what members should be looking for. The video, which can be as low-tech as a cellphone or Zoom recording, adds a personal touch and positions the CEO as the arbiter of knowledge and the board’s strategic partner, Aplebaum says.
- Add recorded narration to PowerPoint slides or other virtual presentations. “We’ve seen a lot of people doing that in this remote environment,” Lockhart says. Board members can watch the presentations before the meeting, which gives them time to reflect on the information and be better prepared when it’s time to discuss it.

There’s no getting around the awkwardness of virtual meetings, a two-dimensional platform where only one person can talk at a time and quieter board members may fade into the background. The CEO can encourage the board chair to call on members who may be finding it difficult to speak up.

### **Guest Experts and Engagement**

Board members don’t have to be subject matter experts in everything, Aplebaum says. In the virtual environment, it’s easier to invite experts to weigh in on topics the board needs to know about. They can join the remote meeting at appropriate moments and give easily digestible five- to seven-minute presentations to prepare the board for informed discussion.

There’s no getting around the awkwardness of virtual meetings, a two-dimensional platform where only one person can talk at a time and quieter board members may fade into the background. The CEO can encourage the board chair to call on members who may be finding it difficult to speak up. If they are investing the time to participate virtually, Lockhart says, you have to make sure that investment is worth it.

“It’s perfectly fine to call on them and say, ‘Bill, I know you have a lot of background in this,’ or ‘Sara, I know you have a lot of passion and experience around this. We’d really like to hear what you have to say.’” Go around the virtual room and call on everyone, he says, to ensure each member has a chance to offer their viewpoint.

### **Access to Leadership**

Boards always need to have strong leadership voices, and that is amplified now. Boards are connecting more directly with members, Aplebaum says, through town halls and other platforms, providing much more accessibility for members to leadership.

“Boards of excellence can use this virtual environment to have more meaningful input and conversations with a wider audience,” he says. “Because ultimately our leaders are not representing their own points of view. They should be representing the membership, those they serve.”

Once the pandemic is under control, Lockhart predicts board meetings will morph into a hybrid format, where perhaps every other meeting is held remotely. Virtual engagement “is here to stay,” he says. “Now it’s a matter of life or death—and the survival of organizations.”

It’s safe to say no CEO or board chair anticipated that 2020 would turn out as it did, Aplebaum says, “and yet, look at the amazing demonstrations of the voice and actions of leadership we have seen across the association space.”