

# DELEGATE BRIEFING: HELM SCRIPT

## Introduction

Hello, thank you for taking the time to meet with me ahead of our upcoming meeting. Before we start, can I check that this is still a convenient time for you and if so how much time do you have for the call?

### <Answer>

This is primarily a tech test call. So firstly can I check that you can hear me and see me ok?

**If no then free format as you will need to resolve this for them before carrying on.**

Is this your first Helmed meeting?

### If "no" then

Great then you will be familiar with the process. Are there any aspects I can help you with or are you comfortable with using the technology, and the features? Would you like me to run through a list of the features we plan to use on the call so you can check you understand them all?

Skip all sections where the delegate is already familiar with it.

As I said in my introductory email, my name is xxxx and I am from Mercer. I will be your helm for the upcoming virtual meeting. My job is to ensure that from a technical and time point of view, the meeting runs well. I will help the chair keep us to time and record the decisions at the end of each discussion. I will not be part of the discussion or any of the decisions; I am there to take care of anything that may get in the way of you having a great meeting experience.

I will support the chair of the meeting by:

- Ensuring the session keeps to the agenda timings and does not overrun the 40min time slot we have allocated,
- Keeping a close eye on the participants to address any difficulties they may have with the technology,
- Helping the chair with the participative and interactive aspects of the meeting making sure everyone's voice is heard and
- Recording the decisions made so we can recap them, for everyone, at the end of the meeting.

Given we want to keep the meeting as focussed and productive as possible; I thought I would run through, with you now, some of the tools we will be using. This will help you familiarise yourself with the technology and ensure you can spend your time during the meeting in the most productive way.

I thought I would:

- Start by speaking a bit about Zoom (**alternative platform**) and how we will be using it, then
- talk about some tips on how you can set up your physical space to help you and others interact and
- agree with you how we can interact during the meeting in case you need my help.

I do not want to be teaching grandma to suck eggs here so if I you are familiar with any of this just let me know and I will jump to the next section.

I trust that is clear. Is there anything you would like to ask me before we start.

<Answer>

### **Zoom (or other platform) tools**

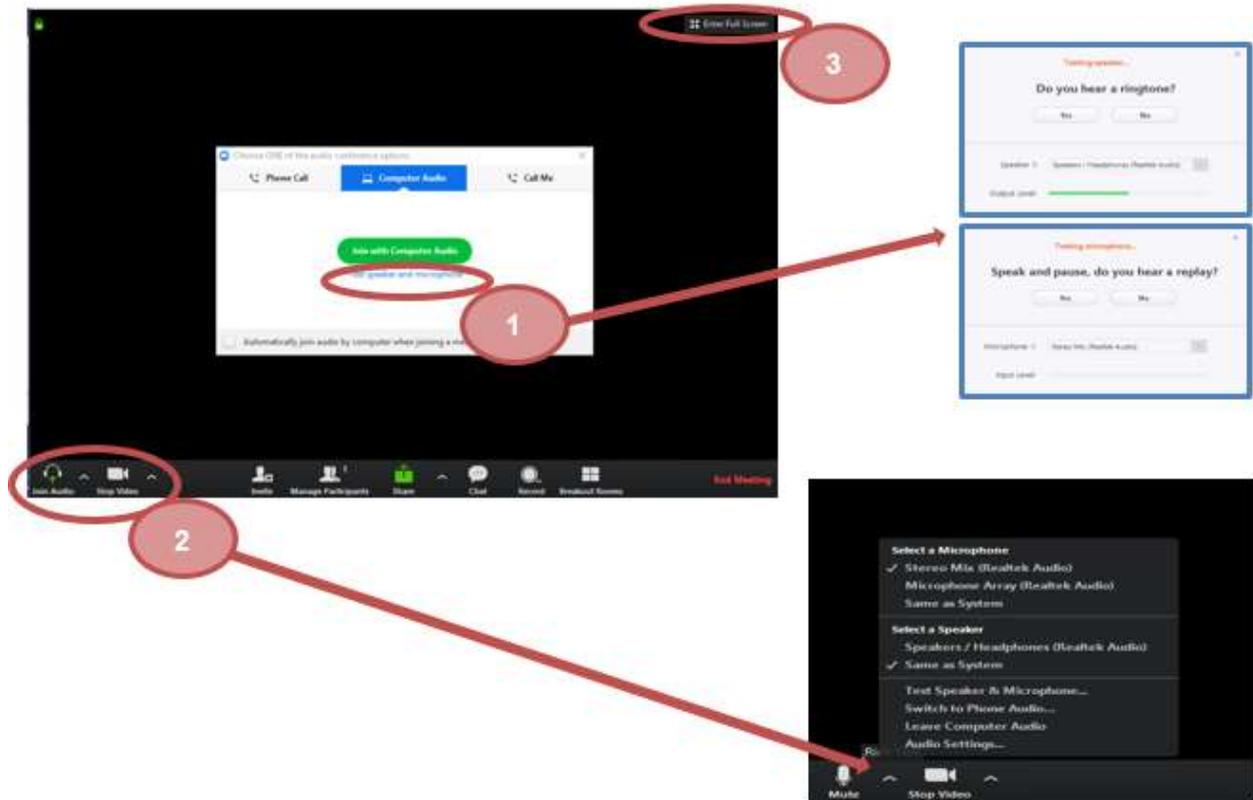
Is this your first time using Zoom? How experienced would you say you were with the tool.

If “no” and then

Great. Are there any aspects of Zoom I can help you with or are you comfortable with using all the features? Would you like me to run through a list of the features we plan to use on the call so you can check you understand them all?

Skip all sections where the delegate is already familiar with it.

Did you click on the internet audio option when you joined? If yes then you may wish to consider joining via phone line instead. This is something I have done.



1. If you are worried about your audio set up then you can test you microphone and speakers by clicking the up arrow next to the headset image.
2. This lets you experiment with different input devices.

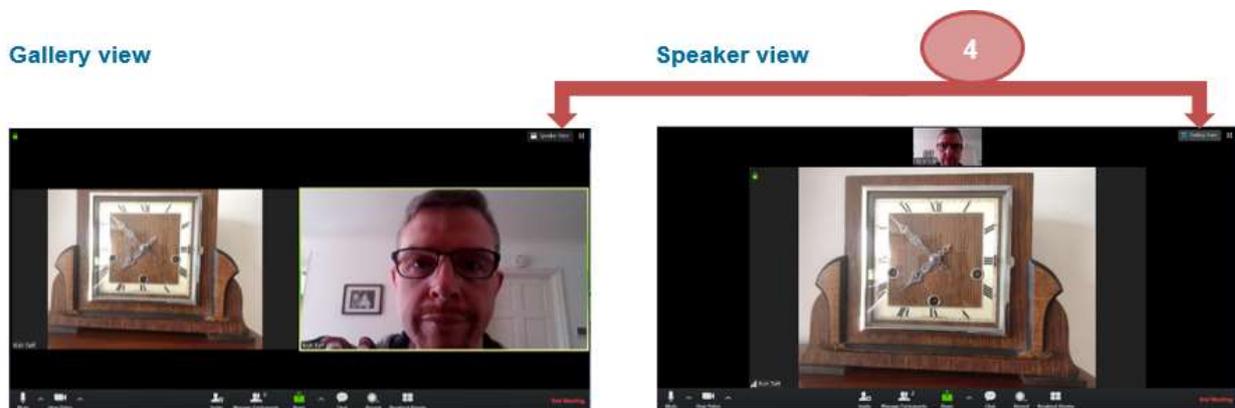
So for example, you can join either using your computer's network connection or separately using a mobile phone or landline. If you have a good broadband connection and a fast computer then you may find that using the computer audio works well for you. However, if you ever have difficulty with broadband or processing power then we strongly recommend joining audio from a mobile or landline. This will ensure you always have a good audio connection even if your computer or broadband stutters. If you do join via a telephone line then please remember to type your participant code into the dial pad of your phone, after you have joined. This will mean your video image and voice link and so when you speak your picture highlights so others see you when you are speaking.

Would you like to try that with me now and I can give you feedback on how you sound and look?

<Answer>

- When you first launch Zoom you have the option to make the application by full screen by clicking the button in the top right corner. We would recommend you do this. I will ensure everything that takes place in the meeting does so in the Zoom window. We find that it helps lower the distractions participants experience if you just have Zoom in front of you. The meeting will only run for 40 minutes so you will have plenty of time to deal with everything else at the end of the call.

In the bottom left corner of the screen are the buttons for turn on and off your microphone, speakers and video. You do this by clicking the picture of the headphones or the video, when it has a red line through the image your audio is muted and/or camera is off.

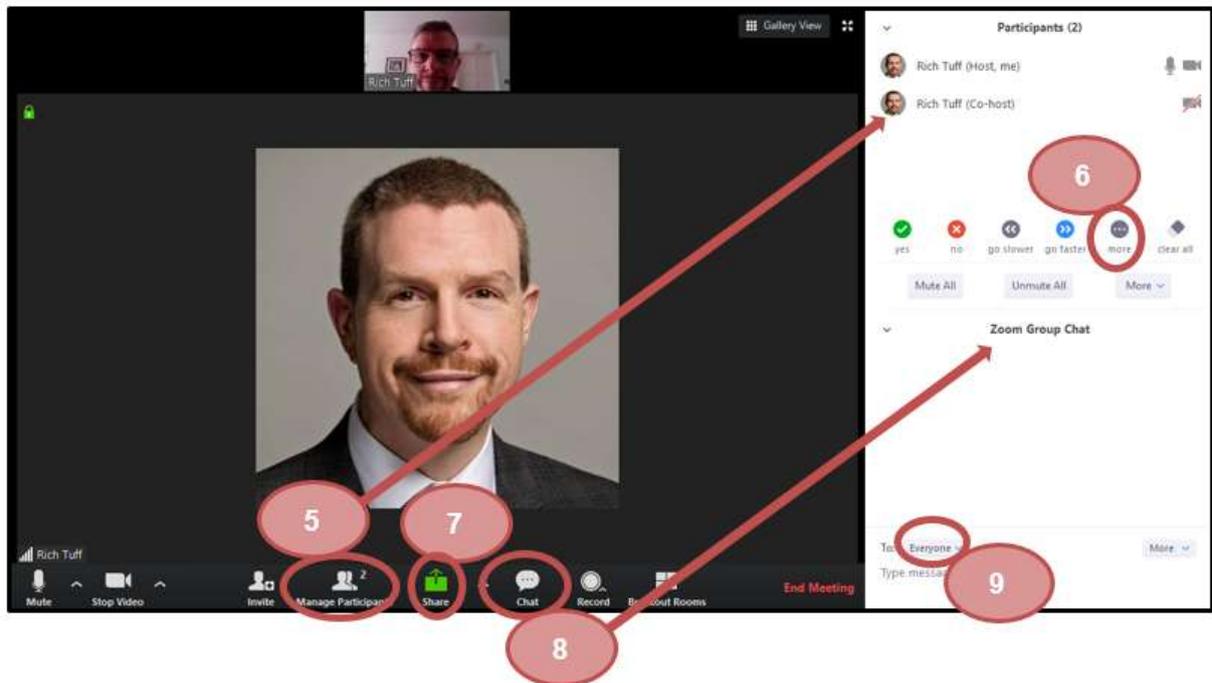


- Are you comfortable with the difference views available in zoom? **If yes then skip to next section.**

In the top left, you will see a button that says either “Gallery view” or “Speaker view”. You click this button to swap between these two viewing types.

**Speaker view** means that whoever is currently speaking will fill the screen. Other people in the group display in smaller pictures. When someone else starts speaking (or sometimes just coughs), the image automatically swaps to them. This view tends to work best when you have a core presenter. It can be less effective for group discussions where you might want to see the facial expressions of everyone on the call at the same time.

**Gallery view** means that you see everyone at the same time. To help you tell who is speaking, their video image highlights in yellow. This view works well for group discussions but can be less effective if you have one main speaker presenting to you.



5. Are you familiar with the menu bar at the bottom of zoom and the features available to you there? *If yes then skip to next section.*

When you pass your mouse over the bottom of the Zoom window, your menu options appear.

If you click “**Participants**” then a window appears showing all the participants on the call. Next to their name, you can see if they have their video and audio on or off and if they are speaking then their microphone highlights green as they speak.

At the bottom of the participant’s box, there are some non-verbal ways of communicating with the group. These are great ways of interacting with the group without disturbing the current speaker’s flow. The Chair may ask everyone to click these buttons to quickly get the mood or maybe answer a yes / no question.

6. If you click the “more” button, you see there are more options for non-verbal feedback for you to click. Would you like to experiment with these buttons with me on the call now?

<Answer>

7. The “**share**” button allows you to show everyone on the call whatever is on your screen. There are a choice of options here. Would you like to experiment with these sharing options with me on the call

now?

<Answer>

8. The “**Chat**” button lets you send free text to everyone or specific people on the call. Again, this stops you disturbing the speaker’s flow.
9. To send a chat, type in the box and select from the drop down list who you would like message then click the send arrow. This is a nice feature but please resist having private conversations over the chat with people on the call. It firstly means you are missing the main discussion and secondly it is too easy to send the message to the wrong person or the whole group by accident. Would you like to experiment with chat with me on the call now?

<Answer>

### Tips for your physical environment

I have a few things that may help you set up your environment to get the best out of the call for you and the others interacting with you. Would you like me to run through these or are you comfortable with setting up a good audio and video connection? **If yes then skip to next section, UNLESS they are doing something that is causing a problem. In which case you may want to find a delicate way of telling them their face is in shadow for example.**

- We recommend if possible, you find a quiet room or corner, where you will not be disturbed, to set up your computer. If a room then please put a note on the outside of the door “Meeting in progress please keep the noise down”.
- For people to have the best view of you while on the call watch out for where the light is in the room. If you have a bright light source (such as a window) behind you then it will cast your face into shadow. Often you get a better picture if you draw the curtain and use artificial lights (above and a little in front of you). Your webcam lens will adjust to the darker room.
- If you can raise the screen and camera up to eye height then this helps others look into your eyes rather than up your nose!
- Usually you will get a better sound if you plug in a headset. Mobile phone headphones work quite well. If you have a headset with a boom mic then make sure, the boom mic is slightly above your mouth and out of range of your nose, otherwise we can hear you breathing.

- We find people normally leave themselves on mute for the period when they are not speaking as it stops others hearing any accidental background noise. If you want to temporarily unmute yourself then hold the spacebar down.

Would you like to experiment with any of these ideas with me on the call now?

<Answer>

### Ways to interact with the helm

I thought we could run through the ways I can help you on the call.

- My job is to help the Chair keep the meeting to time. To do this the Chair or I will remind people of the ground rules for the call. For example, avoid multi-tasking, keep yourself on mute, use the chat for non-urgent feedback etc. Please listen to these rules and do your best to keep with them. If everyone on the call does this then it will work really well, run to time and give each person a voice in the meeting.
- If you have any questions or issues then you can contact me directly during the meeting and I can resolve them without disturbing others.
- To do this you can use the chat and send me a private message or use my mobile number xxxxxxxx for texts if easier.

### Data check

Finally, while I have you on the line can I check that our contact database is up to date with the latest details for you. I have the following information... is this correct?

Thank you for your time. I am looking forward to meeting with you again in the virtual meeting. In the meantime, if you have any thoughts or concerns please, do get in touch.

<Close>