

# Video Conferencing Guidance

Area	Description
<b>Introduction</b>	<p>As a result of government requirements for social distancing, [insert name]’s employees and clients are increasingly working from home, resulting in less opportunities for face to face meetings.</p> <p>This has led to greater use of videoconferencing, which brings with it new risks and challenges to the way we work together and deliver legal services to our clients.</p> <p>This document sets out guidance on when and how to use videoconferencing effectively.</p>
<b>General Responsibilities</b>	<p>Employees should read [insert name]’s work from home procedure to understand their responsibilities and entitlements while working from home.</p> <p>With regards to videoconferencing, employees should:</p> <ul style="list-style-type: none"> <li>• ensure that videoconference conversations cannot be overheard by other people at home</li> <li>• use only [insert video-conferencing platform(s)] for videoconferencing and control access via meeting password or administrator entry control</li> <li>• be aware that videoconferences can be recorded</li> <li>• do not use videoconference chat function or similar to transmit sensitive information</li> <li>• remove voice activated devices such as Alexa and Home from home offices</li> </ul>
<b>Videoconferencing set-up and general use</b>	<p>It is important that you and your home office present professionally.</p> <p>As a general rule, use the “video” in videoconferencing i.e. allow people to see you as it engenders trust. Always use video if the client is doing so. If restricted internet bandwidth means that using video compromises audio quality, try to start with video and explain that you will switch to ‘audio only’ to preserve bandwidth.</p> <p><b>Before meetings:</b></p> <ul style="list-style-type: none"> <li>• a tidy, uncluttered background works best</li> <li>• [insert video-conferencing platform(s)] have a background settings/virtual background function that can be used to replace the view of your home office, if required</li> <li>• dress code for client videoconferences is ###</li> <li>• set your computer camera around eye height</li> <li>• provide sufficient front-lighting to avoid putting your face in shadow or silhouette</li> <li>• position yourself so that you can be seen from shoulders to head at closest or waist to head at farthest</li> <li>• check audio. If required, [insert name] will provide a microphone headset</li> <li>• consider planning the videoconference’s purpose, process and outcomes and emailing a brief agenda. (Disorganised meetings work even less when conducted via videoconference)</li> </ul> <p><b>At the start of meetings:</b></p> <ul style="list-style-type: none"> <li>• confirm all invitees, and no one else, have logged in</li> <li>• ensure everyone has been introduced and that everyone’s audio is working</li> <li>• consider setting out the videoconference’s purpose, process and outcomes</li> </ul> <p><b>During meetings:</b></p> <ul style="list-style-type: none"> <li>• remember to look at your computer camera, rather than only at the document on your screen. This creates the impression of meeting the eyes of the person you are talking to.</li> <li>• If you use two screens, place the principal document you will refer to on the computer that has the camera</li> </ul> <p><b>At the end of meetings:</b></p> <ul style="list-style-type: none"> <li>• Confirm that all matters people expected to discuss have been raised, all questions answered, and the purpose of the meeting achieved. (As it may be difficult to read from body language when participants are satisfied the meeting is over.)</li> <li>• Agree on next steps - described in terms of action, owner and deadline</li> </ul> <p><b>After the meetings:</b></p> <ul style="list-style-type: none"> <li>• Follow up with email to confirm client’s instructions, facts, areas of uncertainty/assumptions and advice</li> </ul>

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<b>Matter management</b>	<p>Initial meetings, screening and engaging prospective clients</p> <ul style="list-style-type: none"> <li>• Whenever possible, conduct initial meetings with prospective new clients via videoconference not telephone; it better enables you to gauge the sophistication and suitability of the prospect and to create trust</li> <li>• Our standard for VOI still requires sighting of physical VOI document(s) and cannot be done via videoconference. However, where the risk of identity-based fraud is low, you may:               <ul style="list-style-type: none"> <li>» sight VOI documents in the videoconference, ensuring that picture quality is adequate for verification</li> <li>» request that copies or photos be emailed to you</li> <li>» explain that this verification is preliminary only, and that [insert name] will not commence substantive work on the matter or be involved in any transactions until the physical documents have been sighted</li> </ul> </li> <li>• Where possible, if face to face meeting is not feasible use VC rather than telephone to initially discuss client’s objectives and concerns for matter</li> </ul>
<b>Practice management</b>	<p>As a team, we need to consider and agree how we replicate the communication that usually occurs in the office. In particular:</p> <ul style="list-style-type: none"> <li>• Supervision: both of individual matters and the professional development and mentoring of individual junior lawyers</li> <li>• Informal work communication: where we discuss matters, clients, changes in the law, management of the practice etc. outside scheduled meetings</li> <li>• Social interaction: where we talk about things other than work!</li> </ul> <p>All ideas on these matters are welcome, please raise with ##role##</p>