

Virtual Meeting Success Guide

Updated March 28, 2020

Overview

Face-to-face meetings can be difficult enough to facilitate, but virtual meetings offer new layers of complexity: technology, distance and distractions (just to name a few!). Following are some tips and tricks to consider and implement before, during and after virtual meetings to help ensure all virtual meeting participants experience collaboration, engagement and productivity. Ideas range from thoughtful preparation, to skillful facilitation and intentional follow-through.

Before the meeting:

- ✓ Choose the right technology (e.g., audio, video)
 - If using video, all meeting participants should be on video
- ✓ Appropriately prepare for each meeting
 - Determine and include in the agenda what the purpose of the meeting is
 - List in the agenda the objectives that need to be achieved by the end of the meeting
 - Draft and disseminate an agenda well in advance of the meeting
 - Ensure everyone has contributed to it
 - Verify the agenda gives each person time to share / report out
 - Invite all required participants to the meeting
 - Establish clear roles, including facilitator, timekeeper and scribe (to take down action points and record decisions made)
 - Create agreed ways of working with one another (also known as **ground rules**); following are some examples:
 - Make sure callers say hello and introduce themselves.
 - Say your name each time you speak.
 - Use your mute button to eliminate background noises.
 - Focus your comments and keep them brief.
 - Agree how actions will be recorded, communicated and followed up.

During the meeting:

- ✓ Be present, limit distractions and avoid multitasking
- ✓ Take some time during each meeting to get to know one another on a personal level
- ✓ Create a go-to place for informal discussion during meetings (e.g., Slack, chat box, texting)
- ✓ Everyone should participate each meeting by sharing their ideas, insights, feedback, support and concerns
- ✓ Keep people focused throughout the meeting; intervene when the group loses focus or gets off track
- ✓ Plan interactive meeting elements to help maintain engagement (e.g., share screen, images, video, polling, gamification)

After the meeting:

- ✓ Document and timely disseminate action items, timelines and responsible individuals
- ✓ Follow through on assignments, check in with one another to identify any roadblocks and brainstorm possible solutions
- ✓ Periodically evaluate virtual meetings — What's going well? What's not going well?
 - Determine what to stop, start and continue