



Virtual Meeting Checklist

Like any meeting, a virtual meeting should be well planned and engaging for all those who attend. Unfortunately, most who take part in frequent virtual meetings don't often find that is the case.

From conference calls that are difficult to hear to videoconferences with poor quality and too many or extremely dull visuals, virtual meetings can be even less effective and more of a time-waster than face-to-face meetings.

By ensuring your **meeting is planned effectively** and then following specific steps for getting everyone around the virtual table, you can make your next conference call or videoconference efficient and stimulating for everyone involved.



Virtual Meeting Checklist

- ☐ Prepare and distribute any documents and the agenda ahead of the meeting. It will give attendees time to review and formulate questions. In the agenda, the meeting leader should spell out who will speak and in what order so that remote listeners and attendees can follow along.
- ☐ When scheduling the meeting, the meeting leader should also indicate what equipment or software may be necessary for the meeting. For example, if the attendees will need to see document changes, the use of a computer screen and Internet access along with file sharing may be required.
- ☐ Watch out for time zone changes. People in different zones may not be available or may be less than attentive during a meeting scheduled at lunch time or too late or early in the day. Try to find a time that is agreeable to all parties, if possible.
- ☐ Test audio/visual equipment and necessary software prior to the meeting in person. Be sure everything functions as it should and if not, call in support to explain the functionality or to help remedy the issue. If the test fails and cannot be fixed in time, you may need to reschedule the meeting.
- ☐ Ensure that remote attendees have access to equipment needed to complete the meeting. It may require the use of a microphone, video camera, computer screen or just a simple phone line. Remind these users to test their own equipment prior to the meeting, too.
- ☐ When the meeting begins, introduce yourself as the meeting leader and be sure remote attendees are able to hear you and each other and that you can also hear them clearly. Headsets with microphones can help with clarity and sound issues.
- ☐ Sometimes it's necessary for remote attendees to mute their microphones or phone lines during the meeting. If several people call in, you can never be sure what extraneous noise may come through their lines. Just remind them to turn off the mute feature when they need to be heard or have a question.
- ☐ Use videoconferencing when possible. For smaller meetings, try to engage people face-to-face, even if it is via a computer screen.

- ❑ Screen-sharing applications are also helpful when discussing several documents, explaining changes or gathering feedback. But don't feel the need to share every document or every screen. Boring visuals can be as uninteresting as being forced to view someone else's vacation photos.
- ❑ Make sure support personnel or someone familiar with the equipment is on hand during the meeting to adjust or fix any issues that may come up. You don't want the meeting to be held up while you fiddle with a microphone that has feedback or a video camera that produces a fuzzy image.
- ❑ Once the meeting begins and all equipment is functioning, allow time for both local and remote members to introduce themselves and ask questions. Make brief small talk to ensure everyone feels engaged and included, but call on attendees one at a time so that no one feels the need to talk over anyone to be heard.
- ❑ If videoconferencing isn't possible, explain your emotions to remote listeners when bringing up a point. It can be difficult for someone who is on a phone line to see that you are smiling or appear excited or upset about a certain point in discussion. A simple "I was elated to see that our team met its monthly goals," is helpful.
- ❑ Take time between topics to ask for input from remote team members. Don't think that because you don't hear from a remote member, they don't have something to say. Sometimes it may be difficult for them to find a good place to "interrupt" and bring up a point or a question.
- ❑ Before closing, ensure that everyone knows what next steps are to be taken and that no further questions are left.
- ❑ Close the meeting and be sure to note if there will be a follow-up meeting(s) before everyone hangs up.