

# 10 STEPS FOR A SUCCESSFUL VIRTUAL MEETING

## *Remote Facilitation*

In the midst of COVID-19, going remote is no longer a choice but has become a critical tool within these new norms. It doesn't mean that you have to throw effectiveness and collaboration to the wind. If running a virtual meeting feels like one big question mark, don't sweat it.

Here are ten easy steps to successfully lead a virtual meeting.

### STEP ONE PREP AN AGENDA

Create an agenda with access information, clear objectives, action items, set time limits for each item, meeting structure, pre-reading assignments, outline next steps (including timing & accountability), Plus & Minus feedback, and adjourning the meeting.

### STEP TWO MEETING NORMS

If your team has established meeting norms, the agenda is a great place to remind your peers of these rules.

If you don't have norms, a draft should be shared as a pre-reading assignment. Include a discussion for establishing norms in the agenda.

### STEP THREE E-SCHEDULE

Send an e-calendar invite at least one week before the meeting. Include instruction on how to access mtg. via Microsoft Teams and a Dial-In option. Share the draft agenda, pre-reading assignments and request any additions for the agenda at least three days before the mtg.

### STEP FOUR SHARE UPDATED AGENDA

After providing others the opportunity to add items to the agenda, resend the updated agenda. Note meetings should be kept to no more than 90 mins hence, items may need to be held for a later meeting and should be included in Next Steps.

### STEP FIVE FINALIZE MEETING ITEMS

Incorporate Microsoft Teams Screen Sharing to showcase visuals and keep participants engaged. The ability to follow along with a slide or shared document will help facilitate and keep discussions on track. Screen sharing should be used intermittently to maximize face time, as well.

Plan an energizer for either before or during the meeting. Start with an ice breaker to invigorate the mtg and give participants a chance to reconnect. Inject innovation and critical thinking by using surveys, break-outs, and the chat feature.

#### *Virtual Suggestions*

- Use a Welcome slide or message @ least 15 mins before start time.
- Schedule starts for 10 am or after 1 pm. This provides those WFH an oppty to get their family/pets settled.
- Engage in small talk - ask how other's are doing.
- Ask others @ home to exit Wi-Fi to ensure a strong signal.



## 10 STEPS CONT'D FOR VIRTUAL MEETINGS

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### STEP SIX

## PRACTICE TECHNOLOGY

The Lead and Point Person should test the technology ahead of time including screen sharing, microphones, PowerPoint, and any other planned features. Suggest participants test their settings, as well.

Take a look at our Microsoft Teams Primer @ [trainingcenter.acgov.org](http://trainingcenter.acgov.org) if you need more support.

### STEP SEVEN MEETING DAY

At least 15 mins before the meeting starts, the lead/point person should connect to Teams and display a Welcome message that reiterates mtg. norms, virtual etiquette, and/or agenda. An energizer is helpful here to connect peers. It also, encourages people to log-in early if there's a quick game or competition.

The Point Person should be on-line to assist with any technical issues & will capture meeting minutes. All should be encouraged to keep notes.

### STEP EIGHT START ON TIME

It is very important to start on time. It not only shows others that you are respectful of their commitment and time, but will ensure the agenda discussions stay on track.

Before you start, be sure to close your e-mail account and any other non-necessary items from running in the background. It is distracting when sharing your screen and may even divulge information that others are not privy to.

### STEP NINE ENCOURAGE DISCUSSIONS & FEEDBACK

To encourage participation, ask others to share their screens when providing updates on an item, periodically call on individuals to speak, use polls or simply go "around the table" virtually, especially before a decision is reached.

Microsoft Teams doesn't have a feature for raising your hand however, just do it physically or use a Giphy/Sticker in the chat to let the lead know you'd like to speak.

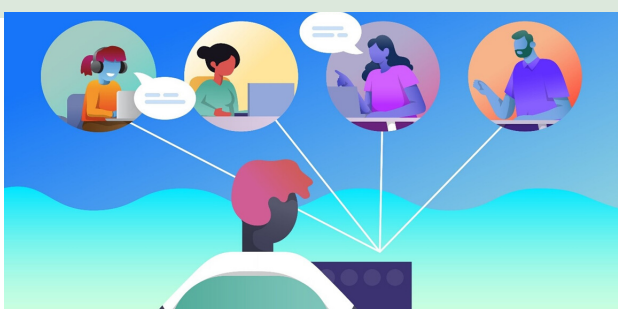
Always seek Plus & Minus feedback before ending a mtg to determinate what worked and what didn't.



### STEP TEN PASS THE TORCH

Provide others the opportunity to lead/facilitate the next meeting. Ask for a volunteer or assign based upon alpha order of last names. A new Point Person can be assigned, but the notetaker should remain consistent.

Leads will be responsible for establishing an agenda and setting up the meeting.



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