Master Large Virtual Meetings

Virtual meetings and face to face meetings have the same fundamental objectives:

- Get everyone engaged quickly

- Inspire great conversations

- Optimize the meeting flow

- Keep the meeting within the planned time frame

- Get the group to their desired objectives

Key Considerations

Successful online meetings require a few different considerations:

- ☐ **It takes (at least) two.** Consider adding two co-facilitators: one who is purely technical, operating the meeting platform, assisting with technical issues and supporting participants in addition to one who runs t**he conversation.**

- ☐ **Set up a contingency communication channel that is external to the meeting.** It can be as simple as "For help, text XXX-XXX-XXXX" (and provide your helper's cell phone number). Be sure to publish the contact information to participants in advance and again during the meeting. This is valuable when a participant is bounced out of a meeting room or is struggling with meeting access.

- ☐ **Breakout Rooms** Make good use of breakout rooms allowing for smaller group conversations. Mix up the groups and change the group size throughout the meeting.

- ☐ **Make your client sponsors co-hosts.** This will allow them to move between breakout rooms so they can participate in small room conversations according to their preferences.

- ☐ **Pre-set a countdown timer** Zoom allows host to pre-set a countdown timer for how long each of the breakout chats can last. (Find this under the option menu when setting up breakout rooms.) Broadcast time remaining to breakout groups during their sessions so they can manage their conversations.

- ☐ **Use easy to access data collection tools.** Google Slides and Docs are easy-to-use data collection tools because everyone knows how to type on a document. In a Microsoft environment, Word and Excel are shareable. Check edit privileges before you send link.

- ☐ **Consider using collaboration platforms.** Tools such as Miro and Mural are electronic whiteboards that support multi-user co-creation activity. The ability to bring in sticky notes, files, images, comment and vote, as well as take advantage of pre-made templates really enables collaboration.

Additional Considerations

Virtual engagement is an art form and here are some helpful tips to ensure your success. Bottom line, conduct your meeting like the professional that you are and you'll be rewarded with the satisfaction of nailing this new world of workplace meetings.

Preparation Matters:

- ☐ **Be prepared.**
  - ☐ **Be familiar with the technology** – test it out ahead of time.
  - ☐ **Be clear with your co-facilitators about exactly who is doing what.** It makes for a MUCH smoother meeting experience.
- ☐ **Give instructions in multiple ways.** Use verbal instructions, screen-share written instructions and copy the instructions into the chat box so they persist into the breakout rooms.
- ☐ **Be thoughtful** about the conversations taking place in the larger room.
- ☐ **Don't lecture.** People will just shut down.
- ☐ **Remember, people need breaks**.

Technical Logistics:

- ☐ **Open the meeting early so you can test audio and video**.
- ☐ **Plan a dry run** for high stakes meetings.
- ☐ **Send meeting reminders with meeting links** 1 - 2 hours before a meeting starts.
- ☐ **Assume lower technological capabilities.** You will not know the capabilities of the attendees and though there will be a range, it's wise to assume lower capability.
- ☐ **Test videos and online tools** and ensure they work in screen share mode.

Getting Engagement:

- ☐ **Strip out complexity.** Take it down to the basics and replace a lot of 'large room' conversations with small-group conversations. This helps with maximum sharing capability.
- ☐ **Engage people quickly**
  - ☐ Use breakout rooms
  - ☐ Use the chat box, either one to one or one to many.
  - ☐ Start with a check in conversations.
- ☐ **Use in meeting polls** to 'take the temperature' of the group on the ideas presented.
- ☐ **Get a little personal**
  - ☐ Because people are working in their homes or apartments, ask them to bring something personal to share with everyone
  - ☐ Or, ask them to grab something close by that relates to what we're talking about.

Meeting Etiquette:

- ☐ **Cameras must be ON** - you need to see faces.
- ☐ **MICs should be ON** in small group discussions.
- ☐ **Have clear purpose** and be realistic about the tangible outcomes.
- ☐ **Ensure that you pattern the meeting to build safety and capacity** for people to talk with each other.
- ☐ **Start and end on tim**e. Have a timed agenda and build in transition time between activities and chats.
- ☐ **Follow up after the meeting.** Know how you will follow up with participants and that participants are clear about how they might follow up with you.