

Best Practice Checklist for Virtual Meetings

Facilitator Checklist

Timing	Practice	Rationale
Prior to meeting	<input type="checkbox"/> Keep meetings short.	Virtual meetings are best kept to 30-60 minutes. Where more time is required use techniques to keep participants engaged. For example: <ul style="list-style-type: none"> • Have breakout sessions at each site. • Have each participant lead a part of the agenda.
	<input type="checkbox"/> Limit the number of participants.	If more than 6-8 participants are required, use one person as a co-facilitator and representative for each site.
	<input type="checkbox"/> Create a more detailed agenda.	Provide extra process information, such as how each agenda item will be handled, how decisions will be made, and how each site/participant will be engaged in the discussion.
	<input type="checkbox"/> Send out more material in advance.	Increase engagement by reducing the amount of time required to provide preambles to agenda items. Follow up with participants prior to the meeting to ensure they received and reviewed the material.
	<input type="checkbox"/> Plan meeting technology.	Only use what is needed. If the meeting purpose is a discussion or update, a teleconference will be better than videoconference. If the purpose is to revise material, a tool allowing real-time edits is useful. Test that the technology works and is available to all participants. Have an alternative plan for technology glitches during the meeting. Make sure participants know the alternative plan.
During the meeting	<input type="checkbox"/> Allow time to re-establish relationships.	Ensure every site or person is welcomed into the meeting and has the opportunity to socially connect to the other participants.
	<input type="checkbox"/> Create a participant map to track points made from each site.	On a page, draw an area for each site/participant. As the meeting progresses, note key points from each in their area. This is useful during the meeting to remind participants of what's been said and after the

		meeting for follow-up documentation.
	<input type="checkbox"/> Review meeting technology ground rules at the start of the meeting.	For example, review how to use mute buttons for teleconferences or pass control to another participant for real-time views/edits.
	<input type="checkbox"/> Do more process checks.	Ask for feedback on the meeting process and how the technology is working. This allows for adjustments to be made and keeps participants engaged. The facilitator is also quickly aware if someone has stopped participating.
	<input type="checkbox"/> Poll the virtual room often.	Participants will need additional information to compensate for the lack of verbal or visual communication. Ask for explicit feedback from each participant/site as topics are discussed. This also ensures constant engagement in the meeting.
	<input type="checkbox"/> Use names frequently.	Help participants remember who is in attendance and help participants stay personally connected to the meeting.
	<input type="checkbox"/> Confirm all terminology and watch for language differences.	Ensure everyone has the same understanding. People are more reluctant to question meaning over the phone or in a fully online meeting and there are fewer body language cues available to detect confusion.

Participant Checklist

Timing	Practice	Rationale
Prior to meeting	<input type="checkbox"/> Get trained on the meeting technology.	Understand how to use the functions and features available. Avoid interrupting the meeting with technology questions.
	<input type="checkbox"/> Take extra time for meeting preparation.	Read the agenda and any preparation material to help keep virtual meetings short.
During the meeting	<input type="checkbox"/> Stay close to the microphone or camera for audio/video conferences.	Speak clearly. Other participants may not be able to hear/see you. Wandering the room results in distracting changes in audio loudness.
	<input type="checkbox"/> Set cell phones/pagers to vibrate.	If the device is a must (e.g. support), ensure it will not interrupt the meeting. If called, inform the facilitator that you are temporarily unavailable. Mute the conference phone line for phone meetings. Remember to announce when you have returned.
	<input type="checkbox"/> Provide your name when participating.	Others may not know voices. Some online meeting tools do not show the name of the person typing in comments. Knowing who the communication is from often adds extra organizational context that would otherwise be lost. It also helps provide the personal connection that helps build teams.
	<input type="checkbox"/> Never interrupt another speaker.	Unlike face-to-face meetings where several voices can be heard simultaneously, some video/phone lines will only broadcast one voice. Parts of conversation can be lost. Provide extra time for people to answer questions as there may be transmission delays.
	<input type="checkbox"/> Respond using the person's name.	Other participants may not understand where the response is directed and not know what is then expected of them.
	<input type="checkbox"/> Be very explicit about thoughts and feelings.	Communication is based 7% on words, 38% on voice, and 55% on visual impressions. Virtual meetings require more explicit statements to compensate for lost communication channels.
	<input type="checkbox"/> Avoid sarcasm and be very careful with humor.	Without body language and/or verbal cues, sarcasm or humor can easily be misinterpreted.
	<input type="checkbox"/> Don't add participants during the meeting.	Ensure only those identified are participating to avoid potentially embarrassing communication.