

# VIRTUAL MEETING CHECKLIST

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Comprehensive list of some simple items to help you get the most out of your next virtual meeting. #JustSayNo to talking heads!

## PART 1: PRE-MEETING

- Send out pre-meeting survey to solidify agenda.
- Create agenda, complete with expected log-in time.
- Create and send out communication piece.
  - Include agenda
  - Short “how-to” video: How to log-in, how to navigate virtual space (if new group)
  - Include other documents, downloadable (handouts, resources, etc)
  - Set collaboration expectation
- Set up meeting space.
- Test meeting space.
- Practice using features. Know the tool.
- Prepare collaborative space for brainstorming or ideation (Google Doc, OneNote, Dropbox, etc.).
- Have list of participants and locations.
- Plan engagements and activities based on agenda items. Plan one activity or interaction every 3 – 4 minutes.
- Ensure meeting isn’t any longer than 60 minutes. If longer than 60 minutes plan for a 10-minute break.

## PART 2: MEETING BEGINNING

- Prior to log-in time:** Have slides uploaded.
- Prior to log-in time:** Have resources uploaded.
- Prior to log-in time:** Practice with virtual tools to ensure operation.
- Prior to log-in time:** Be sure all entrance notifications for participants are set to “off” to avoid interruptions.
- Prior to log-in time:** Test video, if using (or use video to briefly open meeting, then close).
  - Ensure focus is face-level (not too high, not too low)
  - Notice what is in the background and make adjustments as needed
  - Adjust for color, if needed (Are you washed out on camera?)
- Prior to log-in time:** Open the white board for possible use.
- Prior to log-in time:** Have link to collaborative space (such as an open Google doc) ready to send to group.
- Prior to log-in time:** Have any needed polls or surveys loaded (or links to surveys ready).
- At log-in:** Have icebreaker question posted to begin interaction, have participants answer in the chat.
- At log-in:** Engage with the participants verbally to test audio quality.
- At log-in:** Have producer handle any tech issues from participants.

- At log-in:** Ask a question to encourage use of the “green checks”, “red x’s”, “raise your hand”, “use emoticons.”
- At log-in time:** Mute participants if there are more than 10 members in the group.
- At log-in time:** Ask participants to close tabs to ensure smooth technology quality.
- Prepare to record.**

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## PART 3: EXECUTION

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- After participants answer the icebreaker question, turn on video to welcome people to the meeting. Encourage others to introduce themselves if it is a smaller group (less than 10).
- Set virtual meeting group rules: use the chat to encourage responses or build on the list. If the meeting is scheduled for longer than 60 minutes, let people know that a break will be called so they can handle other business.
- Set the tone. If you sound bored, people will be bored.
- Engage the chat feature often for larger groups, ask open ended questions.
- If smaller group:** Engage participants verbally to pull in additional thoughts/comments.
- Frequently check in with the group by asking “green-check, red-X or emoticon” questions.
- Repeat questions often and summarize answers.
- Allow time for people to respond. Plan 1/3 longer response time for answers. Plan for silence as people think.
- Debrief any larger points and clarify for understanding.
- Use collaborative space (for example, Google doc) for brainstorming or ideation.
- Assign different roles for people to encourage group notetaking (and reduce multi-tasking).

**Note:** When asking questions or looking for feedback, give specific instructions. Every time.

1. “In the chat tell me how we can improve communication with remote workers.”
2. “Using the “green-check” let me know if we can move on the next agenda item.”
3. “On the whiteboard, use the text tool to write the pros and cons of this initiative.”
4. “Click on the “happy face” if you are back from the break.”

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## PART 4: POST-MEETING

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- Send out post communication:
  - Meeting recap notes
  - Review decisions, action items, next steps
  - Link to the collaborative document
  - Link to the meeting recording
  - Attach any screenshots
- Send out brief survey to assess meeting success and ideas for the future. For example:
  1. Did the virtual meeting meet the stated expectations?
  2. Did you feel you were able to contribute?
  3. Did the meeting host encourage interaction?
  4. Did the virtual meeting technology work smoothly?
  5. Did you know how to use the virtual tools?
  6. Would it be helpful to provide you with more information about how to use the virtual tools?