Checklist for Creating Stellar Online Meetings

Creating stellar online meetings require some advanced planning to ensure they run smoothly. Here is a checklist to help you.

Meeting Set-Up

- ☐ Ask yourself if an online meeting is necessary, or could this be an email?
- ☐ Determine meeting purpose and create an agenda (ask for input from those attending the meeting, indicate if there are deadlines associated with items, leave room for questions).
- ☐ Select the best time for all invitees.
- ☐ Secure the use of the meeting platform.
- ☐ Decide if you need to use a collaboration tool and/or a mindmap.
- ☐ Invite the right people (and only the right people) and assign roles if necessary.

Preparing for the Meeting

- ☐ Make sure everyone invited has access to the collaboration tool or mindmap if using one.
- ☐ Share the agenda with the participants.
- ☐ Share any pre-reading material or requests for advanced preparation with participants.
- ☐ Prepare any presentations, questions, or handouts to share before or during the meeting.
- ☐ Confirm your participants have all responded to your invite and have accessed the materials.

Conducting the Meeting

- ☐ Before connecting, ensure your office space is (reasonably) quiet and free from distractions.
- ☐ Start the meeting on time.
- ☐ Do an audio check to ensure all participants can hear and be heard.
- ☐ Inform participants of what tools to use (mute, chat, poll, etc.).
- ☐ If you are recording the meeting, inform your participants and start recording.
- ☐ If participants are unfamiliar with each other, ask for introductions. Remind participants to use their names when they speak so that their ideas can be captured in the recording or the notes.
- ☐ Confirm the participants who have been assigned roles are in place.
- ☐ Decide on the decision-making process, if necessary, that will be used during the meeting. Will the participants be voting, coming to consensus, or only giving input for leaders to decide?
- ☐ Online meetings need extra time for communication delays, keep the pace slower than in-person meetings.
- ☐ Only ask one question at a time. Give extra wait time for answers.
- ☐ Remind participants to stick to the agenda if they start to veer off course.
- ☐ Before the meeting ends, ask participants to recap what was shared and their action items.
- ☐ End the meeting on time.

Post-Meeting Tasks

- ☐ Share notes from meeting including action items.
- ☐ Follow-up with action items.