

## Virtual Meeting Best Practice Checklist

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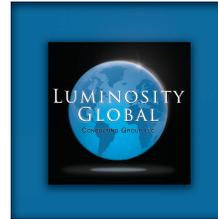
### Purpose

When done well, virtual meetings mean saved money and greater collaboration of multicultural skilled resources. Done poorly, they can be highly unproductive, negative experiences.

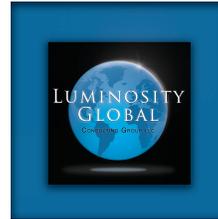
Best practices for face to face meetings still apply, but more is required for virtual meetings. Use the following Facilitator and Participant best practice checklist to get the most benefit from virtual meetings.

### Global Facilitator Checklist

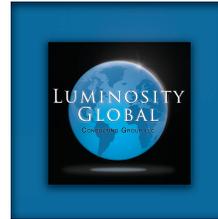
Timing	Best Practice	Rationale
<b>Prior to meeting</b>	<input type="checkbox"/> Know Who Your Participants Are	Know the expertise and cultural orientation of each member of the virtual team. A suggestion:  Before the first meeting, distribute a short biography of each team member so that everyone is aware of the expertise on the team and begins the association with some brief personal knowledge of the individual team members.
	<input type="checkbox"/> Determine meeting protocols and team norms in advance	Rules of Engagement are important so that all team members know and understand what is expected of them. Decide how decisions are going to be made, what level of participation is expected, how cultural or language barriers may be addressed and what communication style is used prior to



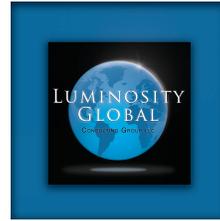
		the meeting – be prepared to discuss and amend at the first meeting.
	<input type="checkbox"/> Establish clear goals and objectives	It is critical that the virtual team knows and understands why they are on the team, what their role is, and what they are trying to achieve in the wider context of organizational goal attainment.
	<input type="checkbox"/> Keep meetings short.	Virtual meetings are best kept to 30-60 minutes. If more time is required, use techniques to keep participants engaged. For example: <ul style="list-style-type: none"> <li>• Have breakout sessions at each site.</li> <li>• Rotate the facilitation of each agenda item.</li> </ul>
	<input type="checkbox"/> Limit the number of participants.	If more than 6-8 participants are required, use co-facilitators by enlisting a representative from the larger sites to ensure appropriate levels of engagement and to help keep the meeting stay on task.  Tip: Meet virtually with potential co-facilitators in advance to ensure collective understanding of roles.
	<input type="checkbox"/> Create a more detailed agenda and ensure ownership of each agenda item.	Provide additional process information: how each agenda item will be handled, who will handle it, how decisions will be made, and how each site/participant will be engaged in the discussion.
	<input type="checkbox"/> Send out materials in advance.	Increase engagement and save time 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 have



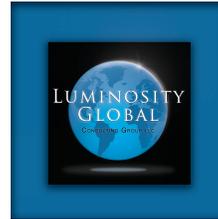
		reviewed the material.
	<input type="checkbox"/> Plan and rehearse meeting technology if not thoroughly familiar with the technology and its features.	<p>Only use what is needed. If the meeting purpose is a discussion or update, a teleconference will be better than videoconference. If the purpose is to revise material, a tool allowing real-time edits is useful. Test that the technology works and is available to all participants in advance. Have an alternative plan for technology glitches during the meeting. Make sure participants know the alternative plan.</p>
<b>During the meeting</b>	<input type="checkbox"/> Allow time for introductions or to re-establish relationships.	<p>Ensure every site or person is welcomed into the meeting and has the opportunity to socially connect to the other participants.</p> <p>Tip: At the initial meeting ask each participant to provide a brief overview of skills, talents and personal profile.</p>
	<input type="checkbox"/> Create a participant map to track points made from each site.	<p>On a piece of paper, 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. It is also a useful tool to ensure adequate participation.</p>
	<input type="checkbox"/> Review meeting technology, ground rules, team norms, and goals and objectives at the start of the first meeting.	<p>Review how to use mute buttons for teleconferences or pass control to another participant for real-time views/edits. Review the ground rules, norms, goals and objectives previously drafted and ask for input or feedback, as appropriate.</p>



	<input type="checkbox"/> Do frequent 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 (or co-facilitators) 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, if videoconferencing is not in use. 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 assist participants with staying personally connected to the meeting.
	<input type="checkbox"/> Confirm all terminology and watch/listen for language differences that may cause miscommunications.	Ensure everyone has the same understanding. People are more reluctant to question meaning over the phone or in an online meeting and there are fewer body language cues available to detect confusion.
	<input type="checkbox"/> Assign outstanding tasks – with owners and deadlines	Ensure all task assignments are clearly identified and ownership is assigned, with a clear due date to maintain progress toward stated goals and objectives
<b>After the meeting</b>	<input type="checkbox"/> Produce meeting minutes and distribute in a timely manner	Produce meeting minutes within three business days , clearly stating status of each agenda item, any follow-up items, and all outstanding tasks with business owners and completion dates clearly documented.
	<input type="checkbox"/> Ensure team members each understand their	Contact team members to ensure communication was clear throughout the meeting and to receive any feedback team members may not have been

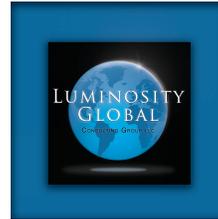


	commitments	comfortable stating on the call.
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## Participant Checklist

Timing	Practice	Rationale
<b>Prior to meeting</b>	<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.
<b>During the meeting</b>	<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, or a delay in language



		translation.
	<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, especially in a multicultural meeting.
	<input type="checkbox"/> Don't add participants during the meeting.	Ensure only those identified are participating to avoid potentially embarrassing communication.
<b>After the meeting</b>	<input type="checkbox"/> Provide feedback or ask questions	Provide any feedback to the team lead that was not communicated during the meeting in a timely and proactive manner. If anything was unclear during the meeting, follow up with the team leader immediately to get clarification.
	<input type="checkbox"/> Take Action	Take ownership and action on any agenda items you may own for the future and ensure any assigned tasks are completed in advance of the stated deadline.

