Master the Art of Facilitating Productive and Engaging Virtual Meetings

Virtual Facilitation Foundation Skills

RESOURCES TOOLKIT

About this Resources Toolkit

Whether you are new to facilitating online or already comfortable leading meetings in person/virtually, this comprehensive toolkit will provide you with a front to end process and resources to support you in mastering your virtual facilitation skills.

This toolkit is designed for users especially in corporate or business environment who need to participate or host professional meetings with internal teams, remote contractors, clients or any group situation. The content here is sourced from our personal learning experience, from our failures and successes and also from experts from around the world.

Our workshop is facilitated via Zoom. We understand that this may not be the platform you are using, yet we will demonstrate functionalities of this platform which are comparable to many other video conferencing programs. You will learn and practice meeting facilitation skills instead of the technical features of the platform.

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VIRTUAL MEETING CHECKLIST FOR PREPARATION

Plan the meeting

- o Define meeting purpose and outcome

- o Confirm the role of Host, Note Taker, Participants and other Observers

- o Check everyone has the equipment they require

- o Check everyone's time zone (https://www.worldtimebuddy.com)

- o Arrange a 15-minute testing time a few days before the meeting

- o Touch base with the participants individually to get agenda items

- o Prepare for the meeting communication:

    Meeting agenda

    Pre-meeting reading

    Meeting access information

    Meeting guidelines

Before the meeting

- o Agenda created and distributed

- o Ground rules established

- o Reports ready and distributed

- o Attendees confirmed

- o Meeting access information and meeting guidelines sent

- o Remind participants for pre-meeting reading

- o Notes capture in place

- o Check meeting call link

During the meeting

- o   Join the call at least 15 mins (Host) before the call

- o   Start on time

- o   Request attendees engage with video

- o   Explain ground rules

- o   Keep on track - follow the agenda

- o   Get people involved

- o   Establish a verbal method for doing consensus checks

- o   Summarize and use frequent prompt and playback questions

- o   Create an action plan

- o   Review all issues, decisions and action items prior to ending the meeting

- o   End on time

After the meeting

- o   Publish a re-cap immediately after the meeting

- o   Distribute action plan and notes

- o   Follow-up

Virtual meeting design checklist

When to use it? Prepare your meeting agenda for participants and use this checklist to design how you will run your virtual meeting (as a facilitator agenda).

Purpose	o Information sharing o Decision making o Team building o Learning and training
Date / Time	o Recurring o Time zone o Working hour
Participants	o How many o Who and Why o Time zone (https://www.worldtimebuddy.com)
Roles	o Facilitator o Timekeeper o Host / Co-host o Technical Support o Note Taker
Materials	o Meeting agenda o Pre-meeting reading o Meeting access information o Meeting guidelines / ground rules
Meeting guidelines / ground rules	o Casual o Corporate / Business o Multi-culture

Facilitator agenda	o Based on the meeting agenda, map out the process steps:
	   1. Framing – what to do on each agenda items
	   2. Engagement – who is involved, how to achieve outcomes
	   3. Tech tools needed – share file/screen, breakout room, chat, etc.

Technical	o Participant has the equipment they require o Technical support on call-in and/or online login o Test run before the meeting o Rehearsal for facilitator agenda o Technical support before/after meeting
Communication and scheduling	o Time zones o Calendar invitation o Reminders o Follow up notes

Technical checklist

Invitations

1. Is the link to the virtual meeting correct in the materials that were sent? Email? Calendar requests all have the correct link?

2. Is the time correct in the invites? Does it match the time in your online meeting account?

3. If you are working across time zones, ensure the option for changing the calendar invite to match the invitees time zone was selected.

4. Let people know the preferred method of joining: Voice + Video, Voice + Screen Share + Video, Just Voice, etc?

Time and number of participants

5. Do you have enough capacity for the expected number of participants? Some systems stop at 100 or 10. Check your account.

6. Do you have enough capacity for the amount of time and participation? Some systems cap out at 3 people for 40 minutes in free accounts. Check your account.

Meeting settings

7. Have you prepared the settings you prefer in the system? Waiting room? Mute upon entry? Video on? You can set up waiting room and mute upon entry, or you do not need these settings for regular meetings.

8. Some systems use the same link for all of an individual's meetings (Ex: Webex Rooms). Ensure that you have selected the option to have a closed meeting, or people may enter your previous meeting.

9. Do you plan to record? Have you preset recording (prefer to upload on cloud)? Have you informed/asked participants?

Speaker readiness

10. Have you checked the lighting and setting where you will be sitting if you will be on video? The light should be towards your face, not behind you. For example, don't sit with a sunny window behind you. You will be shadowed.

11. Consider clearing clutter behind your desk so people can focus on you and your message.

12. Check your microphone and your volume when you practice with the virtual system. Do a test call with someone in a different space to see if there are audio issues you can't hear on your end. You may need to invest in a mini-microphone, headphone or speakers to be clear. These devices often provide much better sound quality than your phone and sometimes better than your computer.

13. If the key speaker plans to be in a room with others, consider using two computers/devices in the room -- one that can be close up on the primary speaker - the other that can focus on the room as a whole. (You'll need to mute microphones and speakers on one of the devices.) An alternative is to invest in a camera that will follow whoever is speaking in the room.

Materials and expectations

14. Have you downloaded a copy of the slides you plan to use on the computer you will be using for the virtual meeting? Using a downloaded copy helps save you some internet bandwidth. Some virtual services will let you add your slides into their system to save space.

15. Can you preload polls you plan to use during the session?

16. Consider including an opening slide that shares instructions or expectations with participants. These are some instructions for sign on:

    o Large events: All lines have been muted. Please use the chat feature to ask questions or introduce yourself. We are recording this session. If you are experiencing technical difficulties, please call xxx-xxxx or email xxxx@xxxx.xxx

    o Small events: Your lines are open. Please turn on your video camera so we can see you. The meeting will begin with introductions. Please be ready to answer our opening question: xxxxxxxxx?

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Avoiding problems

17. Can you optimize internet bandwidth? For example, try setting your device to high priority on your wi-fi or Internet router. Or, ask others to limit high volume internet use during the time of your meeting (i.e. no streaming movies, online game play, or downloading huge files).

18. Do you have your slides ready to email (or shared folder) in case some people can't see the screen and join only by phone? Could you do this before the call begins to all participants?

19. Identify a co-host who can step in if something goes wrong with your internet settings. Look for a setting where you can add this person as a co-host in the system.

20. Especially for large events, do you have someone ready to help the presenter? The support person can read the chat box, solve technical problems, or launch a PowerPoint if the primary speaker is struggling with technology. Having one person in charge of speaking and one in charge of technical issues helps keep the call from stopping if technical issues arise.

21. PRACTICE. Use the hardware, software, links, slides and cameras to make sure you're ready.

22. Know when to quit. Agree with your team in advance about your plan if you experience technical difficulties. For example, if tech is not working 10 minutes after the starting time will you postpone, persist, switch platforms, or send as a follow up?

Consider these roles when you design your next virtual meeting

❶ The **Leader**

- **Determines** meeting location, time, and attendees
- **Develops** an agenda
- **Guides** the group through the agenda
- **Ensures** equal speaking opportunities
- **Maintains** a positive, safe atmosphere
- **Assigns** other meeting roles
- **Communicates** conclusions and next steps
- **Assigns** responsibilities and action items
- **Sets** the next meeting date

❷ The **Recorder**

- **Distributes** agenda before the meeting
- **Works with Leader** to develop agenda
- **Records** key decisions, conclusions, and action items
- **Compiles notes** into standard formatting
- **Distributes** notes and conclusions
- Also performs all **Participant responsibilities**

❸ The **Timekeeper**

- **Manages time limits** set for each item
- **Manages visual aids**, A/V equipment, whiteboards, flip charts, PowerPoint presentations, etc.
- Also performs all **Participant responsibilities**

❹ The **Participant**

- **Understands** the agenda and purpose of the meeting
- **Contributes** insights to the agenda items
- **Contributes** to the positive, safe atmosphere
- **Presents ideas** concisely with awareness of the meeting's time constraints

Source: https://www.conferencecalling.com/blog/meeting-roles

Virtual meeting activities design checklist

Virtual Training Delivery: Engagement Strategies

	Voice	Webcam	Screen Share	Chat	Polling	Drawing Tool/White Board	Breakout Rooms	Q&A	Quiz
Brainstorm ideas	✓	✓		✓		✓	✓		
Check for prior understanding	✓			✓	✓	✓		✓	
Large Group Discussion	✓			✓		✓			
Small Group Discussion							✓		
Mimic flipcharting/ whiteboarding		✓	✓	✓		✓			
Check for comprehension	✓		✓	✓	✓	✓		✓	✓
Demonstrate		✓	✓						
Role Play	✓	✓					✓		

Source: Endurance Learning, LLC

Workspace checklist before the call

- o Reboot computer a few hours before the meeting to avoid automated updates

- o Turn off all other applications on your computer that you won't need

- o Check batteries of your computer, mouse and other devices for the meeting

- o Close the door of your office/room

- o Close any windows that might cause outside noise that may broadcast

- o Have water or tea close by to drink at any time

- o Have a hard copy print-out of your meeting material as a backup

- o If possible, use a wired internet connection

- o Check your camera is on

- o Check the lighting is good and shows well on your face (avoid having lights in the background of your frame)

- o Raise your camera to eye level so it's pointed straight at your face, not above or below

- o Position yourself close enough to the camera so that your face takes up a good portion of the screen

- o Declutter the space that appears in your frame

- o If you wear glasses, lower the brightness on your screen to reduce glare and reflection on your lenses.

Mental checklist before the call – What if...

- o People do not show up – write down their names and follow up later

- o People are late – welcome them and let them know the current agenda item

- o People not responding – give them time and go to the next person/item

- o The document doesn't display properly – tell the group, try again, ask for other ideas

- o I clicked the wrong button – it's ok, no one is PERFECT!

- o People don't like my facilitation style – just be YOURSELF!!

" FOCUS ON THE MEETING GOAL, NOT THE TECHNOLOGY "

Virtual meeting host quick check

REMEMBER THIS	DO THIS
Before the meeting 1. Set aims, review agenda 2. Materials ready 3. Get myself ready: get a drink, take a breath	**Before the meeting** 1. Communicate: say hello to everyone 2. Be transparent about how things are going - a stressful day, a challenging project 3. Vary where you are (if possible) for different events - stand up formal presentation, outdoor for informal catchups
During the meeting 1. Listen 2. Breathe 3. Follow the agenda 4. Manage the time: communicate if time is running out 5. Be flexible if unexpected things happen	**During the meeting** 1. Describe verbally what you have on screen - which page/item you are on 2. Communicate about questions, interrupt if necessary or tech issue – use visual (wave hand) or text (chat box) clues 3. Close other screens/tabs to avoid distraction 4. DO NOT check email or phone message 5. Consider your body language - be present
After the meeting 1. Keep clear notes of actions and deadlines, communicate as necessary 2. If things went wrong – reflect, learn from it 3. Take a break before moving on to the next thing	**After the meeting** 1. Thank everyone 2. Stay online for a bit to say bye informally or chat briefly 3. Be the last one to end the meeting if you are the host

Remote Office: Five Phases for Conducting Efficient Meetings, Workshops and Group Sessions

Know your objective and group

Know your Objective

- What is your objective?
- What is the content that has to be shared?
- What is your deliverable?
- What is the main outcome?

Know your participants

- How many people will participate?
- Who are the participants?
- Where are the participants located?
- What is their situation and connectivity?
- What are the time zone differences?

Choose a format and technology

Know your format

- What format to use in order to reach the objectives and engage the participants? (e.g. meeting, workshop, lab)
- Technology features
- What are the core features required? (Double check, if the available infrastructure is adequate before suggesting the use of new tools)

Know your tool options

- Does it offer audio and video?
- Does the tool work alone or does it have to be combined? (Keep in mind that too many different tools can be overwhelming)
- Does everyone have access and know how to use the tool?
- How to set up the virtual space?
- How can information and results be documented afterwards?

Translate methodology

Design inclusive activities, processes, and flow

- How do the objectives translate into virtual activities?
- How can they be time-boxed? What is the process and length, breaks, etc.?
- How to create power-hours to maximize productivity?
- How to integrate breakouts effectively (individual /group work vs. in person/virtual)?

Increase engagement

- How to facilitate virtual collaboration?
- How to handle limited verbal communication?
- How to visualize processes?
- How to distribute the agenda / pre-read and assign pre-work?
- How to set up templates and dashboards?
- How to introduce the tool?

Deliver the virtual session

Interactive introduction

- How to kick off?
- How to make introductions?
- How to orient and onboard?
- How to energize/warm up?

Compact main part

- How to explain activities?
- How to facilitate breakouts?
- How to share and discuss work?
- How to conclude?
- How to ensure focus and sense if it is time for a break?

Actionable wrap-up

- How to conclude?
- How to take decisions?
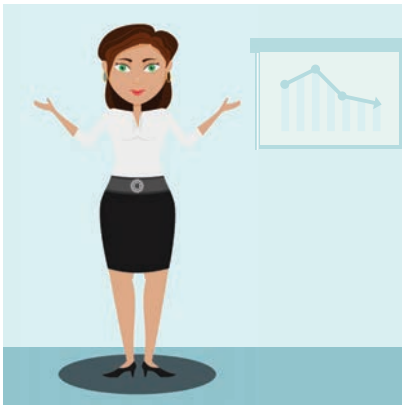- How to create an action plan?
- How to reflect?

Follow-up

Share results

- How to summarize the virtual meeting, workshop or lab?
- How to document and download the virtual meeting, workshop or lab to share results?

Turn momentum into action

- How to follow-up?
- When to meet again?
- How to create commitment?
- How to create and manage an action plan?
- How to capture feedback?

THE TOP 10 PRESENTATION MISTAKES

that people make…and how to rock it instead.

BY CATHEY ARMILLAS

1 INFOWHELM
Overwhelming your audience with too much data and/or information.

HOW TO ROCK IT
Use less information, more stories and a honed focus on a unique idea.

2 BEING AUDIENCE IGNORANT
Not speaking to the interest or technical level of your audience.

HOW TO ROCK IT
Present what your audience wants and needs to hear. It should be for them.

3 THE SLOW START
Taking too long to get your audience interested in your presentation.

HOW TO ROCK IT
Open with something the immediately grabs the attention and interest of your audience.

4 OVER-EXPLAINING
Rambling, reading slides or talking too much without engaging the audience.

HOW TO ROCK IT
Share only what's necessary. Engage and interact with your audience to keep their attention.

5 SAMENESS
Using the same vocal pitch and/or the same emotional level in your presentation.

HOW TO ROCK IT
Mix it up. Bring the audience up and down to keep them engaged and interested.

6 ENDING ON Q&A
Ending on questions diminishes the control you have to close out strong.

HOW TO ROCK IT
Do Q&A towards the end but then finish with a powerful story, point or call to action.

7 GOING OVER TIME
Not staying within the specified time limits and holding your audience captive.

HOW TO ROCK IT
Make sure you always stay within your time, even if you have to cut it short.

8 DREADFUL VISUALS
Using visuals that are overwhelming to look at or uninspiring.

HOW TO ROCK IT
Use simple and relevant visuals that will connect to your point in a strong way. Visuals don't have to be slides.

9 I BEFORE YOU
Using too many "I" statements and not enough "you" statements. It disconnects you from your audience.

HOW TO ROCK IT
Keep the I/you balance tipped towards your audience.

10 THE WEAK FINISH
Your closing is the last thing your audience hears. Don't end on "thank you" or any other weak close that leaves them uninspired.

HOW TO ROCK IT
End with a strong call to action or thought-provoking statement. Something that they'll never forget.

2

TEMPLATES FOR GUIDELINE AND GROUND RULES

Suggested ground rules for all participants

When to use it? Include this in your communication e-mail

1   Ensure your technology tools are working in proper order before joining (Internet speed, video, audio)

2   Join meeting from a distraction free workspace

3   Prepare in advance for meeting by reading agenda, objectives and any preparatory materials

4   Set devices to Do Not Disturb (DND) for the duration of the meeting

5   Raise your hand before you speak

6   Announce yourself when joining or leaving the meeting

7   Always identify yourself before speaking

8   Remember to use your mute/unmute button

9   Do not conduct side conversations or make inside jokes

10 Speak clearly and at appropriate volume

Sample guideline for running virtual meetings

When to use it? Share this factsheet to anyone for running their first/next virtual meeting on Webex platform.

-- Prepare For Running Virtual Meetings --

This factsheet provides information for companies and teams on how they can prepare for running effective virtual meetings.

Meeting requirements

Companies/Teams may use telephone or video conferencing to conduct company/team meetings. Check in advance in order to a valid decision, the meeting must have a quorum or required members to present in the meeting.

Using Webex for online company/team meetings

Webex is the videoconferencing solution provided by the company. Use this standard platform to conduct your virtual company/team meetings. Using Webex requires:
- The Host to set up company/team meetings and send email invites to meeting participants.
- Participants to download and install the Webex Meetings App on the device of their choice (desktop computer, laptop or mobile device) OR to access Webex meetings from an Internet browser.
- If a participant does not have access to a device, they can dial in using a mobile phone or a landline.

Accessing Webex Meetings

The Webex Meetings app can be installed on computers and mobile devices, allowing easy access to videoconferencing anywhere, anytime. Choose the download option that best suits your needs from the options below to join your scheduled company/team meetings.

Option 1: Download Webex Meetings for PC

1. Download the Webex Meetings app at webex.com/downloads.html
2. Double click the 'wevexapp.msi' file you downloaded
3. The Webex Meetings set up wizard will launch. Follow the instructions to set up.
4. Once installed, the app will launch automatically
5. To open the app once installed, double click the Webex Meetings icon on your desktop.

Option 2: Download Webex Meetings for iOS

1. Download the Webex Meetings app at webex.com/downloads.html
2. Open your downloads folder. Double-click the 'webexapp.dmg' file
3. Drag and drop the Webex Meetings icon into your applications folder
4. Open your applications folder and double-click the icon to start using the app
5. When you have finished installing the app, drag and drop the app icon into your Dock for easy access

Option 3: Webex Meetings for mobile devices

1. Download the Meetings App for your mobile device at webex.com/downloads.html or from the AppStore or Google Play
2. Follow the instructions to add the app to your device

Option 4: Webex Meetings for Internet browser users

1. Open Webex Meetings from an Internet browser at https://www.webex.com
2. Login to access or just enter the meeting access information

Joining a Webex Meeting

You will receive an email or a text message with your meeting details. You can join your scheduled Webex Meetings in several ways:

- Clicking the green 'Join' button on the popup reminder from the Meetings app on your desktop or mobile device (Note: the join button will not be available until the host has started the meeting).
- Entering the 9-digit meeting number and meeting password into the relevant fields when prompted on the Webex Meetings app.
- If you have been invited by email, joining information is provided at the bottom of the meeting invite. You can join the meeting:
  - o via your Internet browser using the meeting link contained in the email by accessing webex.com and entering the 9-digit meeting number and meeting password into the relevant fields when prompted
  - o via phone (audio only) by calling provided phone number and entering the 9-digit meeting number you have been provided with and following the automated joining instructions.

Tips for running online meetings

Online meetings can be difficult to run, especially with people who are not used to participating online. There are a few tips which can help people adapt quickly, feel included and comfortable contributing and feel they have effectively contributed to decision making.

PREPARATION FOR THE MEETING

- It is important to be clear on the role of the Host, Note Taker, Participants and other Observers.
- Be clear on what you have to do to prepare - make sure everyone has the equipment they require, that it is working and that they know how to use it. If possible, arrange a 10-minute testing time before the meeting for participants to get familiar with the platform.
- Formulate an appropriate agenda. Touch base with the participants individually to get agenda items.
- Ensure any pre-meeting reading is distributed at least 5 working days before meetings. Send out meeting agenda, pre-meeting reading and meeting access information with meeting guidelines to all participants.

AT THE MEETING

The Host (Facilitator) needs to be clear on what is to be achieved at the meeting and make sure all voices are heard. Going 'round the table', to provide everyone with the opportunity to speak, gives everyone a chance to contribute and can overcome any discomfort with the new format.

Use meeting guidelines to facilitate the smooth running of the meeting. They include:
- Always use a headset
- Use mute when you are not speaking
- Allow the meeting host to manage the meeting
- The host should establish the way in which everyone can participate, examples are:
  - Use visual clues when you want to speak, e.g. raise your hand
  - If only using audio, use the chat feature to ask to speak
- For each agenda item, the host asks participants in sequence to speak and follows up at the end for any further questions
- If the quality of the video conference is poor, turn off video and continue with just audio
- If the host is recording the meeting, notify all attendees and seek agree prior to commencing the recording.

FOLLOW UP

- Ensure minutes are circulated.
- Follow up any questions.
- De-brief with people you feel may not have contributed because they were uncomfortable with the format.

Sample email meeting invitation

Dear Team,

Please join the Sub-Committee Induction Meeting next week. I've prepared an agenda and attached for your preparation of the meeting. Please upload your meeting material to our shared server **before 15 October**.

The meeting invitation and access information is below. If you have any questions, please let me know.

Thank you very much. Looking forward to seeing you in the meeting.

Best Regards,
Deane

Deane Lam invites you to join this Webex meeting.

Meeting number (access code): 126 200 xxxx

Meeting password: RKcfM6xxxxx (7523xxxx from video systems)

Wednesday, 18 October, 2020

7:00 pm | (UTC-07:00) Pacific Time (US & Canada) | 60 mins

Join meeting

Join by phone

Use VoIP only

Join from a video system or application

Dial 1262xxxxxxx@meetingsamer34.webex.com

You can also dial 173.2xx.x.xx and enter your meeting number.

Join using Microsoft Lync or Microsoft Skype for Business

Dial 12620xxxxx.meetingsamer34@lync.webex.com

Sample email meeting reminder

When to use it? Send out meeting reminder 1 to 3 days before the meeting.

Dear Richard,

This is a reminder of your Sub-Committee Induction Meeting at 12:00pm (Sydney, Melbourne Time) on Saturday, October 31, 2020. Please note the link to the meeting: https://us02web.zoom.us/j/35xxxxx.

If you haven't done so already, kindly schedule your test run call with Joe (our Tech Support): https://calendly.com/xxxxxxxx. Please complete this test run before attending the meeting.

On Oct 31, we invite you to log on 10 mins prior to check your audio/video functionalities and to ensure we start on time. We will start our meeting PROMPTLY at 09:00 HKT.

Remember to read the meeting materials located in <u>our shared folder</u> before joining the meeting.

Please contact me if you have any questions.

We look forward to seeing you soon.

Best Regards,
Jenny

Sample facilitator agenda

When to use it? Prepare your meeting agenda for participants and use this facilitator agenda to design how you will run your virtual meeting.

Agenda Item (Framing)	Preparation (Engagement)	Process (Tools)

1. Team agree on the previous meeting minutes?
    1. Time: 2 minutes
    2. Purpose: Decision
    3. Lead: Jenny
	Whole team review the previous meeting minutes – send file	Poll function

2. What changes, if any, should we make to the next agenda?
    o Time: 3 minutes
    o Purpose: Decision
    o Lead: Charlie
	Whole team input	Open group discussion
		Use slide

3. Introduction of new team structure
    o Time: 5 minutes
    o Purpose: Info share
    o Lead: Jenny
	Slide
	Ask team to type questions in Chat box
		Share slide on screen
		Chat box

Sample meeting agenda

Sub-Committee Induction Meeting Agenda

Location: Webex conference call

Date: 18 October 2020

Time: 6:30pm – 7:30pm

Chair: Jenny Watson

Minute taker: Joel Karlsson

Attendees: Kate Hudson, Rebecca October, Michael Samson, Jaiprakash Mongala, Jamie Page

Purpose:

The purpose of this induction meeting is for the new team to understand the sub-committee's basic functions in order to support us to plan future projects in an effective way. **<u>Please prepare</u>** to share:

1) Purpose (why we exist) - e.g. to build stronger team, new business, review policy
2) Project (what we do) - e.g. action/project status, how people response, outcome
3) Resource (how we do) - e.g. number members, money, facilities, sponsors

Agenda – 60min:

1. Welcome by Chairperson – 5 minutes

2. Introduction of Sub-Committee (share Purpose, Project, Resource)
    A. People Team – Rebecca – 10 minutes
    B. Business Team – Kate – 10 minutes
    C. Policy Team – Michael – 10 minutes

3. Sharing of thoughts – 20 minutes
    A. Who/How we will collaborate more in the future?
    B. What should we change in the new normal?

4. Q&A; Thank and closure – 5 minutes

Preparation:

- Please upload your meeting material to our shared server link: Subcommittee Shared Folder **before 15 October** so that we can access to the details before and after the meeting.

Sample meeting note

Sub-Committee Induction Meeting Action Plan

Location: Webex conference call

Date: 18 October 2020

Time: 6:30pm – 7:30pm

Chair: Jenny Watson

Minute taker: Joel Karlsson

Attendees: Kate Hudson, Rebecca October, Michael Samson, Jaiprakash Mongala, Jamie Page

Apologies: Kristina Dream

Items	Action by	When	Action/Status
Induction briefing	All	18 Oct	Done. Presentation slides are located at shared drive. Kate will catch up with Kristina.
New product ideas	Kate	26 Oct	Send slides and pictures of PRODUCT to sales team
ABC System implementation	Deane, Kate	23 Oct	Submit any technical or performance questions about SYSTEM to Sam (Testing team)
	Helen	27 Oct	Update the next step in the XX trial
New policy	Cecilia	2 Nov	Send presentation and notes concerning to the new policy regarding the use of PRODUCT

Next Meeting: 20 November 2020

Closure of meeting: The chairperson declared the meeting closed. Time: 7:30pm

Sample opening presentation slides

When to use it? Include these slides at the beginning of your workshop, first time meeting or a new group of participants to remind them about the ground rules and meeting preparation.

15 Virtual Meeting Etiquette for PARTICIPANTS

I	Attend the meeting from a quiet location.
2	Use headphones or ear buds if there are others around you.
3	Turn on your camera.
4	Join the meeting early or be on time.
5	**DO NOT** use your phone or other device to record any part of the meeting (or share on social media) without the consent of everyone in the meeting.
6	Mute yourself when not speaking.
7	Avoid conversations with someone where you are or by phone.
8	Mind the time. Keep your sharing time as short as you can.
9	Avoid discussions of outside issues such as politics, religion, other not related topics.
10	Use the Chat to "Everyone" feature sparingly.
11	Raise your hand before you speak or use the "Raise Hand" feature.
12	Try to speak to the camera.
13	Don't disrespect people in the meeting by making faces, making gestures with your hands, changing your background, or rotating your camera image.
14	Identify yourself when you join the meeting, check your screen name.
15	If you are concerned about revealing your physical location or people seeing into your house, sit with your back to a wall or curtain.

15 Virtual Meeting Etiquette for HOSTS

1	Join the meeting at least 15 to 30 minutes earlier and welcome everyone when they join the meeting.
2	Stay on after the meeting and be the last one to end the meeting.
3	Describe verbally what you have on screen.

4	ALWAYS tell the participants or ask for permission about your action –
	  o "Welcome everyone, the agenda today is…"
	  o "I'm going to mute all of you to avoid…"
	  o "I'm going to disable the chat feature because…"
	  o "Let me share the file with you now…"
	  o "May I have your permission to record this meeting for…"

5	Ask people who have joined by phone to identify themselves and change their screen name, so participants know who is present.
6	To reduce cross talk while the meeting is underway, you may disable the chat feature.
7	It is helpful to mute all participants when the meeting begins, and unmute individuals doing a reading and the speaker.
8	Use the "Share" feature to display readings. Have these documents open on your computer prior to launching the meeting so they can be called up quickly.
9	Meetings proceed most smoothly when there is a Host working "behind the scenes" while the Chairperson (with Co-Host privileges) conducts the meeting.
10	The Host can be screening and admitting participants, helping participants change their screen names, and using the private Chat feature to communicate silently with the Chairperson.
11	Always thank the presenter/speaker before moving on to the next item.
12	Disable the "Record" feature for all meetings.
13	Consider your body language – ALWAYS be present.
14	Communicate about questions, rephrase or interrupt if necessary.
15	Always check with the group if they can see/hear clearly, if they need a break or a drink.

3

13 ICEBREAKERS AND ENERGIZERS

1

Show me your workspace

One of the challenges of remote work is turning your home into a temporary office space. As your colleagues are joining the call, ask them to do a little virtual tour of their workstation or just take a photo and share with the team.

Sharing a bit of your home with others is a nice way for your team to bond and helps start the meeting on a positive note. We recommend this icebreaker for smaller team meetings.

2

Family portrait

Great way to have fun during a virtual meeting is to take a screenshot of everyone on a video chat. To spice things up, take a different one each time — make funny faces, bring in your pets, do a crazy gesture, you name it.

3

Let's get physical

Incentivize one of your more athletic colleagues to lead a 5-minute stretch exercise through video chat or simply encourage your colleagues to stand up from their desks and jump a couple of times.

Some physical activity will fire up your teammates and clear their heads for a little while.

4

Coffee time

Take a break from the meeting for a while and enjoy quality time with colleagues over a cup of coffee or tea.

Before your meeting, or in between meetings, gather on a video chat with your teammates for an informal catch-up.

5

Put the record on

Help your team loosen up a little with some music. Have someone from your team be the meeting DJ and play some funky music as your colleagues join the call.

If you're using Zoom, just play the music on your computer, click 'Share' and tick the checkbox 'Share computer sound'. You'll enjoy some time together and break the stereotype of everyday work and meetings. The more expressive ones can even pull off some dance moves!

6

Doodle away

At the beginning of your meeting, ask your teammates to grab a pen and a piece of paper and doodle away.

When the meeting is coming to an end, have your teammates share their artwork with the rest of the colleagues by showing their papers into the camera.

During more formal remote meetings, you can ask your team to take notes during the meeting and then, in the end, share what they jotted down.

7

Two truths and a lie

Each person takes turns to say 3 things about themselves — two of those things are true and one is a lie. The group has to guess which of the 3 is a lie — it's good fun!

8

Share an embarrassing photo

This is a great team-building activity to get to know each other on a more personal level. Go through your phone and find a funny or embarrassing photo from your past and share it with the team.

It doesn't necessarily need to be from your phone, you may even want to share that terrible family photo framed on your bookshelf. You'll be sure to get plenty of laughs out of this one, learn a thing or two about each other, and become closer as a team.

9

Go grab it

Ask your team to leave their chairs and go bring one thing back to show the team, for example: bring back one thing that is round, purple color and soft!

10

Ten things in common

As a group, come up with a list of 10 things that everyone has in common — we are all wearing shoes, own a MacBook, etc.

Another variation, if you have everyone working from home, is to find 10 items that everyone has in their immediate area — we all are sitting on a chair, we all have a notepad, etc.

11

One word summary

Have each team member summarize their week so far in one word. The person whose word has the highest Scrabble score gets to pick the icebreaker for the next meeting!

12

Sketch sesh

Ask your remote team a prompt question that can be answered visually, have team members draw their answers, and have the other team members guess what they drew.

Questions like "Who is your favorite fictional character?" or "What is your spirit animal?" are perfect for this icebreaker. The less artistically talented your team is, the better!

13

Crazy hat day

Ask your team to put on a crazy/big/silly hat when they join the meeting. Give each one 10 seconds to tell the story of the hat.

4

COMPARISON OF DIFFERENT VIRTUAL MEETING PLATFORMS

Basic feature comparison

Online Training and Web Conference Platforms: Feature Comparison*

	Voice	Webcam	Screen Share	Chat	Polling	Drawing Tool/White Board	Breakout Rooms	Q&A	Quiz
Zoom	●	●	●	●	●	●	●		
Adobe Connect	●	●	●	●	●	●	●		●
Webex	●	●	●	●	●	●	●	●	
GoToTraining	●	●	●	●	●	●	●	●	●
GoToWebinar	●	●	●	●	●	●		●	●
GoToMeeting	●	●	●	●		●			
Microsoft Teams	●	●	●	●					
Google Meet	●	●	●	●					

* This list was compiled by Endurance Learning using free trial subscriptions and does not reflect official claims of features and benefits by the companies who market and sell these products. This list does not constitute an endorsement of any of the above products or companies.

Source: Endurance Learning, LLC

Pros and Cons comparison

Tool	Price	Pros	Cons	Size	Quality	Ratings
Zoom	Free	o Easy call scheduling o Call recording functionality	o Application required o Limited Meeting time on free plan	Best for large groups	Usually high video quality	8.9
GoToMeeting	Free	o Integrations with email platforms o Simple on screen controls for presenters	o Recordings aren't stored indefinitely o Steep learning curve	Free for small groups, premium can handle large groups	Usually high quality, can worsen with worse bandwidth	7.9
Skype	Free	o User Friendly interface o High Quality Mobile apps	o Limited integrations outside of Microsoft apps o Participants need accounts	Usable for Groups of all sizes	High Quality audio, Video can be hit or miss	7.9
Lifesize Video Conferencing	$$$$	o High Quality hardware o Easy account management	o Limited customization options o Limited available integrations	Best for large groups	High Quality Audio and Video	7.5
BlueJeans	$$	o Easy to add participants to meetings o Straightforward meeting scheduling	o Limited Mac support o No way to save chat dialog	Best for large groups	High Quality audio and video	8.7
Webex Meetings	$$$	o Browser and app based o Integrations with calendar apps	o Limited customizability o Initial setup can be complex	Suitable for groups of all sizes	High Quality audio and video	8.1
Join.me	$	o Easy to share meeting controls o Simple to use browser extensions	o Browser extensions not useful with multiple users o Limited screenshare functionality	Suitable for groups of all sizes depending on pricing tier	Video and Audio Quality dips with any connection interruptions	7.9

Source: https://www.trustradius.com/buyer-blog/large-group-web-conferencing

Remote Working Environment: Re-Thinking Meetings
For different purposes different formats need to be considered

Differentiate formats and technologies depending on the objective, complexity of the topic as well as skills and preferences of your audience

Formats	Key Considerations	Illustrative tools*
Virtual Facilitation	• In times of remote work the need for brainstorming, planning, decision making, alignment, voting, etc. remains • Practical implications: more interaction with virtual whiteboards, polls, etc. help to structure the meeting and ensure effectivity	MURAL, retrium, MS Teams, klaxon, miro, STORMZ
Virtual Communication	• Sharing information to different audiences as well as receiving feedback in a structured way becomes even more important • Practical implications: Video conferencing, group chat, virtual reality tools allow two way communication	Skype, zoom
Virtual Presentation & Meetings	• Meetings will continue to be an effective alignment instrument • Practical implications: Consider performing established meetings virtually and consider introducing new formats like stand-up and status updates with modern and agile tools, using Q&A features and whiteboard templates for interactive lessons learned and reflections	Conceptboard, workplace, slack
Virtual Project Management	• Sharing documents remains a challenge and key success factor in times of remote work • Practical implications: File sharing and collaborative report writing should become part of the DNA of every meeting	Teamwork, Confluence, Jira, Basecamp, Trello, asana, N
Virtual Team Building	• Unbundled teams will continue to collaborate and need to build and keep their spirit • Practical implications: Install virtual coffee and networking dates and use gamification apps to foster a joint learning spirit	Kahoot!, TEAM MOOD, Dr. Clue, donut
Virtual Events	• Although we all know the challenges of small virtual meetings, the need for conference formats will increase over time • Practical implications: Start now to choose technologies for virtual conferences, exhibitions, congresses, etc.	Meetyoo, HEXAFAIR, ENGAGE, VIRTUALIST
Virtual Reality Formats	• Remote work has the potential to become a catalyst for virtual reality based formats • Practical implications: Avatars make collaboration more tangible in the remote office and team-building activities might become more real	Rumii, horizon, Arthur, vr on, MeetinVR, we are

Source: Deloitte Remote Collaboration Report March 2020

*It is recommended to check with your organization's IT services for the appropriate application of tools and software before using it.

Useful resources

1

Tips for putting your best face forward in the virtual workplace

https://asunow.asu.edu/20200424-solutions-tips-putting-your-best-face-forward-virtual-workplace

2

8 Zoom Office Backgrounds To Make Your Video Calls Look Professional

https://www.elitedaily.com/p/8-zoom-office-backgrounds-to-make-your-video-calls-look-professional-22643940

3

Meeting Agenda Templates For Any Type of Conference Call

https://www.conferencecalling.com/blog/conference-call-agenda-templates

4

The 7 Best Video Conferencing Software Platforms for 2020

https://www.dgicommunications.com/video-conferencing-software/

5

Zoom alternatives: Best video conferencing software for business

https://www.zdnet.com/article/best-video-conferencing-software-and-services-for-business/

6

7 best Zoom tips

https://www.fastcompany.com/90483200/ive-been-doing-zoom-meetings-for-years-these-7-tricks-make-them-great

7

25 useful free online tools for workshop planning and meeting facilitation

https://www.sessionlab.com/blog/online-tools-for-workshops/

8

World time buddy: Time converter and world clock

https://www.worldtimebuddy.com