Tips for Leading a Productive Virtual Meeting

Whether in-person or online, leading an effective meeting relies on advance preparation. We've done the work for you and gone through dozens of "Become a Virtual Meeting Pro" articles to share the best tips with you. These tips focus on the actual running of the meeting, rather than the technology, but we've included resources at the end to help with that too. Consider these tips before your next virtual meeting to ensure it's a productive one.

Preparing for the Meeting

Once you've decided that a virtual meeting is necessary and passes the "could this be an email?" test, be thoughtful about what you need to have a productive meeting. A little preparation goes a long way.

Create an Agenda

- Draft a meeting agenda that includes:
    - The goal or purpose of the meeting
    - Key talking points and who is responsible for each
    - Time and duration of the meeting
    - The meeting platform (Zoom, Google Hangouts, conference call)
        - Include the link, password, or phone numbers needed to connect
- Share draft agenda with your team (as necessary) for input and feedback.
    - Share the updated version with your team prior to the meeting.

Choose a Meeting Format or Process

- Determine the best way to hold your virtual meeting by considering the following:
    - What is the purpose or goals of the meeting?
        - Are you trying to collect information or give information or both?
    - How many people are attending?
        - Does everyone need to participate verbally?
        - How will the group respond to questions?
    - What technology do you need for full engagement?
        - Video? Screenshare? Whiteboard? Chat? Polling?
    - What technology does your group have access to? Will anyone need assistance to get connected?

Set Meeting Guidelines

- Develop and share the meeting guidelines: the rules and expectations of how the team is expected to contribute to the virtual meeting.

- Consider the following:

    o Can everyone speak freely, or will the team leader call on someone when it's that person's turn to contribute?

    o Should people mute themselves while others are speaking?

    o Do you want participants to send questions and comments before the meeting begins?

    o Should questions be voiced or written in the chat?

    o Is everyone expected to have their video on?

    o What are the expectations around confidentiality?

Distribute Materials Ahead of Time

- Give participants ample time to access materials by distributing them in advance.

- Make sure documents are clearly numbered and labeled for easy reference as the meeting progresses.

Engaging the Group

Holding meetings via phone or video conference presents a different set of challenges than in-person meetings. You can help your group make this transition by planning for how you will engage your group virtually.

Assign Roles

Assign roles during the meeting to help keep the meeting running smoothly, promote engagement among your participants, and prevent the temptation for side distractions. Some roles you can assign are:

- **Facilitator** is responsible for the process of the meeting, keeping the group on task, following the agenda, concluding each agenda item before moving forward, ensuring everyone is given a chance to participate.

- **Timekeeper** ensures that the meeting remains on schedule, reminds the group of how much time is left.

- **Notetaker** takes meeting minutes, or summarizes progress, assignments, and/or next steps at the end of the meeting.

- **Chat-Box Monitor** checks the chat box and brings up questions or comments.

Connect

Be intentional about how you connect with your group during the meeting to help everyone in the meeting feel engaged and understand how and when to participate. Here are some things to consider regarding connecting virtually:

- Welcome everyone as they sign on. If it's a phone call, ask everyone to introduce themselves before they speak.

- Expect to have some time for personal checking in before you get started, just as you would in an in-person meeting. Set aside some time in your planning for this.
  - You can formalize this time by asking for a check-in from everyone "In two words, how are things going?" or "What has been your biggest challenge this week?" The person leading the check-in should go first to model how to answer and give others time to think.

- When asking questions in your meeting, either specify who the question is for or that it is open to the group.
  - If you're asking questions to the group, avoid a dead silence or multiple people speaking at once by asking for someone to start or using the features in your virtual meeting like the chat to collect answers.

- You can also utilize polling features, screenshare, or other platform features to collect information from the group.

- Avoid long stints with a single speaker commonly called "individual report outs". These are boring and make it challenging for everyone to stay focused.

- Take breaks to check-in with the group regularly. Allow space for the group to voice questions, comments, or technology issues.

Promote Virtual Meeting Etiquette

Many of us are not used to holding meeting via video or phone conferencing regularly. Here are some tips you can share to ensure your meeting runs smoothly.

- If you wouldn't do it in person, don't do it virtually (i.e. checking email, leaving loud notifications on, eating, texting).

- Limit the meeting time to an hour. If an hour isn't enough, schedule breaks.

- If you aren't using headphones with a built-in mic, take notes on paper rather than typing on your keyboard. The keyboard clicking can be distracting when it's inches away from your laptop's internal microphone.

- If you're leading the meeting, make sure there are sufficient pauses after asking a question.

- If you are a participant, bring attention to yourself before addressing the group and then wait a couple seconds before continuing.

- Maintain eye contact by looking into the camera.

- Mute yourself when you are not speaking to avoid disrupting the meeting with background noise.

- Ensure there is adequate lighting for everyone can see your face clearly.

Finishing Strong

Be as thoughtful at the end of your meeting as you are in the beginning to ensure your group leaves with a clear understanding of decisions made and the next steps.

- Leave five to ten minutes at the end of the meeting to summarize your progress and ask for any closing comments or questions. Depending on the purpose of your meeting, you may want to ask a specific question that everyone answers.

- Capture feedback on how the meeting went by sending out an anonymous survey using software like Google Forms. This can help you make adjustments for the next meeting.

About the Conflict Resolution Program

The Conflict Resolution Program (CRP), part of the University of Delaware's Institute for Public Administration (IPA) is a resource dedicated to supporting transformational and organizational change in nonprofit, public, government, and educational settings. This is done primarily through teaching and promoting effective communication, collaborative problem-solving, and conflict resolution.

To learn more about our programs, visit https://www.bidenschool.udel.edu/ipa/serving-delaware/crp