Preparing for a Productive Virtual Meeting CHECKLIST

Virtual meetings allow teams the opportunity to come together to share information, develop plans, solve problems, and make decisions, even if team members can't be together in person.

Like all meetings, virtual meetings are most successful when the meeting leader and participants are fully prepared to take part. In some ways, preparing for a virtual meeting is like preparing for an in-person meeting. However, there are additional considerations to keep in mind when meetings are held virtually, including how to meaningfully engage all participants, particularly if team members are just getting to know each other or are starting a new task.

Meeting leaders should consider the following to help them prepare for and facilitate the meeting:

Agenda and Meeting Materials

- [ ] Send an agenda with the purpose and objectives to all participants before the meeting

- [ ] Share any organizational policies about recording meetings in the agenda or invitation

- [ ] Set aside time in the agenda for team members to check in to strengthen relationships

- [ ] Set aside time in the agenda to discuss expectations to help the meeting run smoothly and ensure maximum participation (e.g., calling or logging-in early, taking turns speaking, using webcams, muting microphones when not speaking), recognizing the need to be flexible and sensitive to team members' preferences and commitments

- [ ] Share materials that require review or pre-work with all participants before the meeting and allow enough time to review

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Technology

☐ Consider how you will use technology to enable and encourage all participants to take part in the discussion (e.g., chat function, polls, virtual whiteboards)

☐ Ensure that all participants have access to and can use the meeting technology, including options for those who don't have high-speed internet or need adaptive technologies (e.g., closed captioning)

☐ Share the technology instructions with all participants before the meeting in the invitation or agenda

☐ Identify someone to help troubleshoot problems with meeting technology (e.g., someone who is trained in virtual meeting technology) and share that person's contact information with participants before the meeting

☐ Have a "back-up plan" or alternative meeting strategy in case of any technical or unexpected challenges (e.g., power outage)

☐ Test meeting technology before the meeting to make sure it works properly

☐ Identify a virtual background (e.g., picture of beach or city view) if desired

Facilitation

☐ Find a quiet place from which you can present and/or facilitate the meeting that is free of background noise and visual distractions

☐ Communicate expectations at the start of the meeting to help the meeting run smoothly and ensure maximum participation, recognizing the need to be flexible and sensitive to team members' preferences and commitments

☐ Identify who will take notes and how meeting actions will be recorded and communicated

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Meeting participants should consider the following to help them prepare and participate in the meeting:

Agenda and Materials

- [ ] Review the agenda and materials before the meeting; if no agenda was sent, ask the meeting leader what topic(s) will be covered and if there are any helpful materials to review

- [ ] Review materials and complete required work before the meeting

Technology

- [ ] Make sure you can access and know how to use any meeting technology (e.g., downloaded any apps, installed plugins)

- [ ] Test your audio and video settings

- [ ] Know whom to contact if you have trouble joining or participating in the meeting

- [ ] Identify a virtual background (e.g., picture of a beach or city view) if desired

Participation

- [ ] Plan your time to so that you can devote your full attention to the meeting

- [ ] Find a quiet place that is free of background noise and visual distractions

- [ ] Think about how you are most comfortable sharing your ideas and perspectives and asking questions so that you are "heard" (e.g., speaking up, using the chat, following up with the leader or other team members after the meeting)

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