Virtual Meeting Guide

Schedule and Send Pre-Work

- Reflect on the purpose of the meeting:
  - Make decisions as a team early in the day.
  - Schedule creative brainstorming in the morning.
- Consider time zone of all participants.
- Avoid reviewing written material as a group by sending in advance.

Set an Agenda

- Four reasons to hold a meeting:
  - Influence others.
  - Make decisions.
  - Solve problems.
  - Strengthen relationships.
- For every virtual meeting, establish a clear agenda with time blocks.
  - Welcome and Check-In.
  - State the Purpose of the Meeting:
    - Decide, Collaborate, Discuss a particular topic.
    - Building Relationships.
  - As applicable:
    - Action item follow-up from previous meetings.
    - Discussion on pre-work.
  - Meeting Topics.
  - New Action Items.
  - Next Meeting Date.

Establish Virtual Meeting Norms

- Test technology before the meeting (camera/video, Wi-Fi, and screen sharing)
- Turn off all notifications and ensure your cell phone is on silent
- Ensure your charger is plugged in
- Start and end on time
- Introduce everyone in the meeting
- Give everyone a chance to contribute.
- Leader on video always, everyone on video if bandwidth allows.
- Keep microphone muted while others are speaking.
- Use the chat function for larger groups.
- Refer to people by first name, not by office, city or department.
- Utilize MVP (minimal viable PPT deck).
- Do a personal-professional check-in at the beginning of each meeting.
- Assign a Yoda. The Yoda's job is to call out what's not being said.
- Use a parking lot for topics that are out of scope
- Ban multitasking

Listen and Keep Everyone Engaged

- Distribute responsibility such as facilitator or note-taker
- Chat room monitor as applicable for larger groups
- Think of the agenda like a pie chart:
  - How much time is spent on transmit?
  - How much time is spent soliciting opinions, ideas and feedback?
  - Who's speaking the most and who's thoughts might you be missing out on? Ask:
    - "Does anyone who hasn't had a chance to share want to offer any comments?"
    - "Who has a thought that makes this idea better?"
    - "What haven't we addressed that we need to?"
- Never go longer than 5 minutes without giving the group something to do or solve.
- Play music at the beginning and/or end of the meeting.

Create an Action Plan

- Ensure every person walks out with a clear objective, including:
  - Deliverables and next steps.
  - Who's responsible for following up on each item or task.
  - When those deliverables are due.
  - Expectations for next meeting.

Ask for Feedback

- What went well?
- What could be better?
- What information was missing?
- How can we prepare better next time?
- What ideas do you have?
- What concerns do you have from your perspective?

1 2 3 4 5 6

"Communication is the real work of leadership."
– Nitin Nohria, Dean, Harvard Business School