

Tips and Tricks for Planning a Virtual Meeting



MEETING ENGAGEMENT TOOL

When planning a virtual meeting, the foundations of good facilitation apply just as much—if not more so—in a virtual environment. Rely on being a neutral facilitator, establishing clear goals and objectives, and picking the right tools to meet your objectives. Make sure the technology supports your meeting outcomes, but don't let the technology dictate your outcome.

Planning Considerations

In addition to all of the normal pre-meeting items you need to address, there are additional ones to consider when planning for a meeting in a virtual environment.

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| <p>Have an assistant</p> | <p>Leading a virtual meeting takes more multi-tasking than a face-to-face meeting does, because in addition to leading the meeting, you might have to monitor chats and poll results, pay attention to raised hands, keep track of time, write on the white board, and move people between breakout rooms. You will also be asked to troubleshoot audio and video issues. Having a co-facilitator, assistant, or technology producer can help with many of these issues.</p> |
| <p>Plan for timing</p> | <p>Virtual meetings take longer than the same meeting held face-to-face. It takes time to move between tools, such as chats, polls, and breakout rooms. Additionally, you have to repeat instructions more often in the virtual environment, because participants may not be able to hear as well, or are more distracted. You also have to pause longer for responses to questions and during discussions to allow time for people to respond via chat or to raise their hand and take themselves off mute. Silence is okay in a virtual meeting, so build in that extra time when thinking through your meeting process.</p> <p>Think about the length of time for the meeting. Try to keep the meeting to 90 minutes, even if that means having to hold several meetings to accomplish your goals.</p> <p>When scheduling the meeting, don't forget to consider the time zones of your participants. Ask everyone to get into the meeting early to work out any last minute technology challenges so you can start on time.</p> |

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| Provide breaks | Studies show that virtual meetings are more tiring, so design your meeting with more breaks than you might normally for an in-person meeting. A good rule of thumb is a five-minute break for a 60-minute meeting, and a 15-minute break for a 90-minute meeting. |
| Perform dry-run | <p>When you introduce technology, there are inherent challenges. Regardless of your technology choice, make sure you are very familiar with it and practice using it prior to the meeting. Download any plug-ins, extensions, or applications required. You may need administrative privileges to do so. Conduct one or two dry-runs with colleagues to work out any kinks.</p> <p>If your participants are not familiar with the technology (or need a refresher), have a required 15-minute meeting a week or several days prior to the actual meeting to have them log on and ensure they understand how to mute and unmute their mic, use the camera and chat features, and utilize other components, such as polls or white boards.</p> |
| Consider technology norms | <p>In addition to the typical meeting ground rules, you'll need to provide technology guidelines for your participants. Examples include</p> <ul style="list-style-type: none"> • Everyone on mute until they want to speak, to avoid audio feedback. • Use the “raise the hand” feature or another mechanism to be called on to speak, to avoid people talking over each other. • Be flexible and gentle with each other. Technology sometimes fails and people lose their connection, have audio feedback, or fuzzy video. Patience is a must. • Avoid distractions; brain research shows that humans can't effectively multi-task, so ask participants to turn off email and phones and be present in the virtual meeting. |
| Mute beeps and chimes | Depending on your technology, the line may beep or chime when people come on or off. If you can, it is a good idea to mute it, as it can be a major distraction. |
| Decide about video | Depending on your meeting objectives, video may or may not be required. Be clear with your participants—is video encouraged, required, optional, or not needed? Keep in mind that video can create more exhaustion, and looking at yourself during a video meeting can change the way you interact. Video can also affect the bandwidth of participants. However, having everyone on video can help with discussions, build trust, and make the team more cohesive. If you choose not to use video, you can ask presenters to submit a photo and you can display that on the screen when they are presenting. |

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| Consider recording | Do you need to record the meeting, possibly for others who couldn't attend? This is a great option if your chosen technology platform offers it. If you do record the meeting, make sure you let your participants know you are doing so. |
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Common Tools Available

There are some similar tools available across many different platforms that your participants can utilize.

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| Breakout rooms | Use for small group discussions and activities. It's always important to have a breakout group facilitator and a timekeeper, and to make sure the instructions for the breakout room activity are posted. |
| Chat boxes | Use to ask questions, answer questions, make comments, or ask for help on technology. Comments are associated with individual names, so the meeting leader can ask follow-up questions directly to an individual. In most platforms, chats can be automatically saved in the meeting transcript. On some platforms, special chat boxes can be used to pose multiple questions at once. |
| Check boxes | Use to indicate quick agreement or disagreement. |
| Notes | Use to record ideas and provide comments anonymously. |
| Polls | Use to get quick feedback, establish consensus, or get a pulse on where a group stands on a topic. All polls are anonymous. |
| Raise the hand | Use to ask questions or make a comment without interrupting another participant. |
| White boards | Similar to a flip chart, use to record ideas, summarize information, and track action items. Participants can also use the white board to record their thoughts and ideas. |

Virtual Meeting Engagement Tools

How can you generate discussions, brainstorm ideas, prioritize recommendations, or make a decision in a virtual environment? These are a few considerations to keep in mind:

- Meeting goals, objectives, and outputs. What do you want to accomplish at the meeting? You want to structure the meeting to allow you to accomplish your goals.

- **Technology.** What technology is available for you and your participants to use? Features will vary depending on the platform, so you need to be familiar with what you have available.
- **Number of participants.** How many people will be attending? A virtual meeting with 10 people looks very different than a meeting with 30 or more.

Once you have articulated your meeting goals, and determined both the technology you are using and the number of participants you'll have, you'll want to design your meeting to reach your goals, while at the same time engaging your participants. Research shows that in a virtual environment, participants need to be engaged every three to five minutes. The table below provides suggestions on engagement tools to use in your virtual environment based on your meeting objectives. The technology functions referenced are common across many different platforms. And remember, plan for the time it takes to switch between tools in the virtual environment.

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| Getting to know each other | If the group is small, ask a question (work-related or personal, depending on the group) and have people share their responses verbally. For larger groups, divide people into small groups and use the breakout room feature—people go into their breakout groups to share responses. You can always ask for responses in the chat feature. |
| Delivering presentations | Presenters can either share their screen or presentations can be pre-loaded and shared. Ask speakers to engage participants, using open-ended questions, comments, or discussions. Participants can respond verbally or through a chat box. To avoid participants talking over each other, ask them to use the raise the hand feature or another signal to indicate they want to speak. |
| Providing input and feedback | Obtain quick feedback from participants by asking for a thumbs up or thumbs down (if everyone is on video), using the chat box, or an anonymous poll. In some platforms, participants can select the green check next to their name if they agree, and the red "x" if they disagree. Participants can also use the white board to put a check or an "x" next to each idea. |
| Having discussions | Discussions can be accomplished as a whole group or in breakout groups. In a virtual meeting, some participants are more hesitant to speak up, so you may have to use breakout groups more often than you would during a face-to-face meeting. If your participant numbers are small, ask participants to use the raise the hand feature, or another signal to indicate they would like to speak. |

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| <p>Having discussions (continued)</p> | <p>If you want to hear from everyone, use the round-robin technique to call on each participant in turn, but let them know they can pass if they have nothing new to add. During the discussion, use the white board as you would a flip chart and record ideas, comments, and paraphrased thoughts. This helps participants know they have been heard, helps others understand the comment, and helps to summarize and move on to the next topic.</p> <p>If you have a large group, breakout rooms could be used for discussion. Participants would be pre-assigned and given specific directions to move into their breakout room for their discussion. Make sure each breakout room has their own facilitator and note-taker, who knows the agenda and how much time they have for the discussion. After the allotted time, bring each group back to the main room, and ask for a summary or report on the discussions. You can then use the white board to record each group's main ideas.</p> |
| <p>Brainstorming</p> | <p>With a small group, you can ask each person to provide an idea or answer to a question in quick succession and record them on a white board. With a larger group, you can use breakout rooms and have each group bring their input back to share with everyone else.</p> <p>You can also use cloud-based tools, such as Mural, Jamboard, or Stormboard, to do a virtual roving flip chart exercise. Participants are directed to a collaboration room where they share ideas on virtual post-it notes, which can be commented on by other participants, moved around, and grouped together. These cloud-based tools allow the meeting leader to take notes and download all the information into a Word document following the session.</p> <p>You can also use a Google document for brainstorming. Share the link ahead of time and ask participants to pull it up during the brainstorming portion of the meeting.</p> |
| <p>Sharing perspectives</p> | <p>Pair people up in breakout groups and ask each person to share their perspective around the particular topic. Each person has a few minutes to share while the other actively listens, and then they swap roles. If time allows, you can aggregate pairs or create new pairs.</p> |
| <p>Prioritizing</p> | <p>If you want participants to prioritize items, you can use the polling feature to ask participants to list their top three (or five) ideas. Once the poll results are in, you can share them with participants.</p> <p>For a small group, you can use an impact/effort grid to eliminate options that may be too hard to implement and don't meet your objectives.</p> |

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| Prioritizing (continued) | Draw the grid on the white board and then for each option, ask participants which quadrant the option best falls into. |
| Decision-making | You can use “fist to five” to help participants reach a decision. Write the option on a white board or in the chat box (“how do you feel about option X?”). Participants respond by displaying their hand: a fist indicates complete disagreement with the option, one finger means significant concerns, two means they have concerns, three means they could live with the option, four means they like it, and five means they love it. If not using video, participants can put their number in the chat box or the facilitator can go around calling on participants. Once everyone has voted, ask those who indicated they were a one or two what it would take to move them to a three or higher. Additional discussion can often resolve identified concerns. |
| Evaluating | Use the poll feature to ask several multiple-answer, multiple-choice, or open-ended questions. Results will be anonymous and can be saved and downloaded after the meeting. |

Common Technology Challenges

Regardless of your technology platform and how much time you practice, there will be some technology challenges during your meeting. Be prepared and always have a backup plan. It's a good idea to have a call-in number in case someone can't get their microphone to connect, their audio isn't working well, or they keep getting dropped from the meeting. It is important to note that in all virtual platforms, the conference call number has to be connected to the virtual meeting space. If that is not done, then even if a participant calls in on the phone they won't hear anything in the virtual meeting room and won't be able to participate. Be aware that participants calling in will not be able to hear or speak if breakout rooms are used during a session, because the breakout rooms require that participants use the computer microphone.

Below are some common things that can happen during a virtual meeting, and suggestions for addressing them.

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| Audio feedback | <p>Ask participants to mute their microphones and unmute only when speaking. Using computer microphones for audio allows the opportunity to “force mute” microphones if a participant is causing a disturbance. If a conference call line is used it is up to the participant to make sure they are on mute. There is no “force mute” option available for the leader to use.</p> <p>If there is feedback when a participant is speaking and all other participants are on mute, ask the participant to disconnect their microphone and then reconnect.</p> |
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| Audio feedback (continued) | Make sure participants' cell phones are not located near their laptops. |
| Video freezes | <p>If a participant's video is freezing, ask them to turn off their camera to save bandwidth.</p> <p>Ask participants to adjust their settings to a lower video resolution (if possible).</p> |
| Audio is cutting in and out | If a participant's audio is cutting in and out when they are speaking, it is usually because their computer microphone and/or webcam are using more bandwidth than their internet connection can handle. First ask the participant to shut off their webcam. If that doesn't clear up the audio issue, ask them to mute their computer speakers AND microphone, then call in on the phone, if a conference line is available for the session. |
| Participant keeps getting dropped | If a participant's internet is not working well, they may be getting dropped from the virtual meeting repeatedly. Ask your participant to use the call-in number, although if they can't see any of the presentations, polls, or chats, their involvement may be limited. It is best practice to make sure presentations are sent to all participants ahead of a virtual session in case something like this occurs, so the participant, even though not in the virtual meeting, can follow along as best they can. |

Additional Information

- [Dealing with Disruptive Behaviors](#)
- [Facilitation Best Practices](#)
- [Facilitation Techniques](#)
- [Group Norms and Ground Rules](#)
- [Process Agenda Development](#)
- [Techniques for Facilitating Virtual Meetings](#)