CHECKLIST: Leading Virtual Meetings
From Leadership Strategies, the experts in virtual facilitation training

Apply these 14 tips to lead successful, engaging group meetings - even when you're not in the same room.

- **plan** Before your meeting...
  1. Distribute relevant information prior to the meeting – including the meeting objectives, agenda, specified time zones of start/end times, and ground rules.
  2. Limit agenda items so that the entire call can be completed in two hours or less. If necessary, break the meeting into several calls.
  3. Ask participants to submit preliminary input and ideas before the meeting.
  4. Request for multiple people at the same location to assemble together in a conference room or other suitable office/environment.
  5. Create a list that shows the name and location of each person expected in the meeting.

- **begin** At the start of your meeting...
  6. Conduct a roll call. Ask each person to state his/her name and location.
  7. Inform-excite-empower-involve in your opening words:
     - Inform participants of the meeting purpose.
     - Excite them about their participation by explaining the benefits.
     - Empower them by letting them know the authority they’ve been given.
     - Involve them by asking a Type B question that engages them.
  8. Add any specific ground rules to assist with “remote meeting etiquette,” such as the following:
     - Announce yourself when joining or leaving the meeting.
     - Always identify yourself before speaking.
     - Avoid using the “hold” button.

- **execute** During your meeting...
  9. Use round-robin frequently to get input from everyone. Establish the order early and follow it each time.
  10. Establish a verbal method for doing consensus checks, such as a round-robin, where each person indicates agreement or disagreement.
  11. Use a meeting software that allows all participants to view on computer the information that is recorded while the session is ongoing.
  12. Do considerable summarizing and use frequent prompt and playback questions to make sure that everyone is comprehending and focused.
  13. Review all issues, decisions and action items prior to ending the meeting.
  14. Publish a re-cap immediately after the meeting.

Discover more facilitation best practices to enhance your virtual meetings and combat the challenges that come with them.

Contact Leadership Strategies.

Leadership Strategies
The Facilitation Company

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