

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-robins 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.](#)



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