Online meeting best practices

How to effectively communicate using online video conferencing

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Advances in technology have made online meetings a great option when face-to-face meetings are not possible. While video conferencing connects people in real time and enables virtual collaboration, like all technologies, video conferencing has its advantages and disadvantages.

As we continue to host meetings with clients and colleagues online, it is important to consider our delivery and preparation for each virtual meeting. This guide is intended to help you maximize your online meeting experience.

Pre-meeting preparation tips

1. **Consider Your Audience.** Tailor your content to your audience and the presentation medium. Minimize slide content and use key terms or phrases that help to drive the content home without distracting from the presentation. We recommend four bullet-points per slide and no more than seven words per point per bullet.

2. **Prepare a Clear Meeting Agenda.** A clear, well-organized agenda is critical to any meeting, and particularly when remote participation challenges engagement. Consider including:

   a. Key talking points.

   b. Meeting structure (i.e. when and for how long to discuss each talking point).

   c. Team members/teams that will attend.

   d. What each team member/team is responsible for bringing to the meeting.

   e. Any relevant documents or research.

3. **Set the Meeting Guidelines.** Ensure that participants enter into the meeting with clear expectations and an understanding of respective roles.

4. **Choose a Moderator.** By appointing a moderator, the meeting will have a clear leader that will work to keep the meeting focused and on time.

5. **Invite the Right People.** Make sure each attendee is responsible for an agenda item and knows what they are expected to contribute.

6. **Check Your System.** Test your speakers, audio and video, Wi-Fi, host controls, meeting settings, camera settings and mute all notifications that may serve as a distraction during the meeting. Review how to share your screen. Close unnecessary tabs in your browser.

7. **Multiple Presenters:** Each presenter should log into the video conference meeting separately and from different rooms. It is important for the audience to see each presenters' facial expressions for a more engaging experience. Note that when not speaking, each presenter should put themselves on mute and stay engaged since they are on camera (avoid multitasking).

8. **Set Time Limits.** If a meeting takes too long, attendees lose concentration. A typical online event should last no longer than one hour, and it is recommended that meetings do not exceed two hours. If you need to deliver more content than two hours will allow, consider breaking up the discussion into multiple sessions.

Nail the introduction.

Allot 30 seconds to explain, in a concise and compelling manner, the purpose of the meeting.

9. **Plan a Rehearsal.** Schedule a rehearsal with presenters a few days prior to the event to review the technology, discuss roles and tasks, and finalize content to make sure the day of is as stress-free as possible.

10. **Delivery Matters.** A virtual environment can be challenging to maintain your audience's interest. Be mindful of your delivery, tone, and environment – no background noise or distractions, dark lighting, etc.

11. **Print a Hard Copy.** Make speaker notes on your hard copy to ensure key messages are delivered. This also serves as a back-up in the event of technology/computer issues.

12. **Utilize Instant Messenger.** Set up a group chat with the presentation team prior to the meeting. This will allow for communication to aid or prompt others in the discussion, give tips on visual/verbal cues, etc. Make sure you are only sharing your application (versus your screen) so others cannot see the instant messenger.

13. **Share only the Application, not your desktop.** This will prevent the audience from seeing other applications that are open on your monitor. You will also be able to view instant messenger and communicate with others presenting without it being visible on screen.

Virtual Meeting Checklist

As you continue to schedule and host virtual meetings, refer to the below checklist of tips and tricks on how to run a great virtual meeting:

☐ **Have a clear plan and agenda.** Review and remind before the call, have clear roles and tasks for all presenters, know who is covering what topics and have a timeline for each.

☐ **Ensure you have the proper lighting.** The best setup is to have light facing you from behind your camera (like a lamp). Try to avoid background (from a window) and overhead lighting. If necessary, turn off overhead lighting.

☐ **Avoid any unnecessary sound.** Turn off computer notifications and alerts, avoid typing, and put your mobile phone on silent.

☐ **Maximize your computer's performance.** Close any unnecessary computer programs to maximize your performance and free up any internet bandwidth. Adjust your camera angle. Ideally, your camera should be eye level. Please maintain eye contact with the camera throughout your presentation.

☐ **Learn how to use your video conferencing service.** Take some time to familiarize yourself with the tool's capabilities, such as:

› Mute/unmute yourself.
› Share your screen.
› Record and share the meeting.
› Share an application.

☐ **Practice using your video conferencing service.** Setup and record a practice a virtual meeting, so you can see how you look and sound. Use this as an opportunity to improve your setup.

☐ **Create Instant Messenger Group.** Set up a group chat to include all involved in the meeting.

☐ **Use sales materials optimized for digital presentations.** Partner with your business and marketing teams on the resources available for virtual/remote presentations.

☐ **Test audio at the beginning of the call.** Ask participants if they can hear you and test if you can hear them.

Online meeting execution

1. **Greet and Introduce All Participants.** Ask participants to include their role and responsibilities. Give everyone a chance to contribute.

2. **Share Housekeeping Details with Attendees.**

   a. Make sure all participants' audio is functioning properly.

   b. Remind attendees to mute their lines when others are presenting or speaking.

   c. Ask participants to identify themselves before contributing.

3. **Remind Attendees of the Meeting Goals.** Reiterate the agenda and meeting objectives. This should flow naturally with introductions.

4. **Be Engaging.** Just as in any meeting, participants should feel engaged – make your discussion interesting with lively interactions and visuals. Actively try to make the conversation a two-way dialogue, build in time for questions as you move through the content to allow for natural breaks for feedback and to confirm alignment. Remain friendly, be positive, and sound energetic. At the same time, move through the content with enough pace so as not to lose interest.

5. **Don't Forget to Watch for and Answer Questions.** Throughout the meeting, participants might have comments or questions. Be sure to listen and keep an eye on all channels (chat features, etc.) so nothing is missed.

6. **Set-out Clear Concluding Actions.** In order for a meeting to be effective, attendees need to walk out with a clear objective. When concluding the meeting, set out clear items as a follow-up or actions to be taken. Ensure that all points discussed and follow-up actions are appropriately documented. Key takeaways should include:

   a. Deliverables and next steps.

   b. Who's responsible for following up on each item or task.

   c. When those deliverables are due.

   d. When the next meeting or check-in will be.

7. **Provide Contact Info.** As the meeting concludes, be sure to exchange participants' contact information. One way to do this is to have a slide at the end of the presentation with names, email addresses, phone numbers, etc.

Impressions matter.

Remain engaged, take notes as needed, and be prepared to speak when called upon. Lack of attention is easily noticed.

Post event follow up

Send a Thank You Email for Feedback. Don't forget that an important part of meeting follow-up is checking in with attendees about how well the meeting went. Send a thank you email or call to request feedback. It might seem redundant, but participants will appreciate the courtesy, and it will give them an opportunity to provide candid feedback.

Best Practices

While different meetings will have different "rules," there are some basic online meeting etiquette practices:

- Start early and start interacting. Have session lines open at least 15 minutes prior to the start time to get the team prepared. Don't miss a chance to connect with attendees – engaging in small talk helps people to feel connected.
- Don't have side conversations.
- Avoid noisy activities like typing while the microphone is on.
- Don't stare at any other communication devices while others are presenting.
- Don't interrupt others when they're speaking (or attempt to speak over them).
- Read the agenda and come prepared.
- Don't work on other tasks (like checking email) during the virtual meeting.
- Turn off all notifications. Silence cell phones.
- Consider propping up your computer with books to raise the camera level.
- Make sure all team members are in a quiet area free from unnecessary distraction.
- Rehearse, rehearse, rehearse.