Guide for Running an Effective Virtual Meeting

Virtual meetings can be an efficient and effective substitute for face-to-face meetings. A virtual meeting allows participants to interact with the meeting leader, presenter and other participants using features within the meeting platform. There are a variety of tools that can be used to ensure that participants are actively engaged including video, audio, screen sharing, chat and breakout rooms.

The virtual meeting format does, however, pose some challenges. Virtual meetings require more planning and attention to detail than face-to-face meetings in order to overcome the interpersonal and technical challenges that are inherent to the virtual environment. In addition to the normal meeting planning activities, there are some particular issues that must be addressed when running the meeting virtually:

- Technology – effective use of the tools within the platform
- Agenda – requires detail for participant engagement
- Set expectations with the participants
- Keep participants engaged and focused during the meeting

Technology

Most meeting platforms allow for up to 100 participants and have the following features and tools within the platform:
- Participants can
    - use their computer audio or dial in by telephone
    - unmute their audio line so they can speak
    - be on video
    - chat with meeting leaders, presenters and other participants
    - type questions in the Q&A box
    - Use icons to raise their hand, agree or disagree, etc (found by clicking on 'Participants')
- Presenters can…
    - poll the audience
    - share their screen
    - use breakout rooms for small group discussions

A producer/moderator should control the platform tools so that the meeting leader and presenter can focus on running the meeting. When planning the virtual meeting agenda, the leader, presenter and moderator should determine where and how the tools will be used.

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Virtual Meeting Roles

It is very difficult to run an effective meeting while dealing with the technology and platform tools. The virtual meeting team should include the following roles:

- Technology Expert
    - Responsible for handling technology issues and fielding technology questions from the participants
- Meeting Leader
    - Runs the meeting
    - Sets the agenda
    - Invites participants
    - Plans the participant engagement activities with the Moderator/Producer

- Presenter
    - Anyone, in addition to the Meeting Leader, making a formal or informal presentation to group

- Moderator/Producer
    - Works with the Meeting Leader and Presenters to plan and set up participant engagement opportunities
    - Advises the Meeting Leader on the best methods and tools to support participant engagement
    - Sets up the meeting room
    - During the meeting, the Moderator/Producer controls the meeting room, monitors questions and chat, keeps tabs on pulse of audience, manages poll questions, shares documents, writes on the whiteboard, etc.

Agenda

As with any meeting, it is important to have an agenda that clearly sets out the topics to be covered and timing. Additional details should be considered when planning a virtual meeting:

- For each topic on the agenda, identify the specific tools which would best support participant engagement around that topic.
- Begin the meeting by getting the group emotionally connected to the meeting outcome. Use a story, compelling statistics, examples, etc.
- Incorporate participant engagement activities every 5-10 minutes or 3 slides. Vary activities such as verbal discussion and/or chat discussion, poll questions, white board, break out rooms, etc.
- Immediately set the tone for participant engagement and interaction.
    - Get participants speaking as they join the meeting
    - Engage them as they are waiting for the meeting to begin
    - Have a poll question on the screen for participants to respond to as they join the meeting
    - As they wait for the meeting to begin, have them respond to a question using the chat box. For example, 'What is your biggest challenge with the Covid-19 crisis?' Have the moderator/producer compile their responses and share on a whiteboard screen when the meeting begins.
    - Have participants respond to a yes or no question using the icons

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Set Expectations with the Participants

Many attendees come to a virtual meeting expecting to passively listen to a presenter (and probably multi-task while doing so!). It's important to set the expectation that participants will be actively involved in the meeting.

- Prior to the meeting:
    - Distribute the agenda to participants ahead of time
    - Provide some questions or things for them to think about and come prepared to discuss
    - Inform participants of your expectations (that they join audio discussion, be on video, etc)

- At the beginning of the meeting, review the agenda and 'rules of engagement' and remind them during the meeting as necessary
    - When and how to mute and unmute their audio
    - Video camera – when to have it on and off, how to select different views
    - Use of chat and Q&A boxes
    - Where to find tools (participant list, raise hand and other icons)
    - Let participants know you will be calling on them

Keep Participants Engaged and Focused

Keeping participants engaged and focused during the meeting is the most challenging aspect of a virtual meeting. Here are some ways to do so:

- Every 5-10 minutes (or 3 slides), participants should be actively engaged, meaning that they do something within the meeting other than listening. Get participants actively engaged through the use of verbal and/or chat discussions, poll questions, capturing ideas using a white board or in small group discussions using break out rooms.

- Vary the ways in which people participate

- Keep track of who's talking and participating so you can engage those who are not

- Call on people often and do so in a conversational way. An effective technique is to ask participants to type something in the chat box, then call on an individual to take their line off mute to expand on or discuss their response.

- Foster discussions with the presenters and other participants rather than just having participants reply to questions

- When asking the participants to provide feedback or answer a question, give them time to respond. It may take longer than in a face-to-face meeting.

- For larger groups, the producer should help to manage discussions. Have participants raise their hand using the icon or physically if on video and indicate when its their turn to take their line off mute and speak.

- Use visuals to help focus the participant's attention – slides, white board, pictures, discussion questions, etc. Don't overload PowerPoint slides with content, rather use the visuals to focus the participants on the interaction.

Webinars

A webinar differs from a virtual meeting in that a webinar provides limited options for communication between the presenter and participants. A webinar is a one-to-many communication with the presenter sharing information with a large number of viewers. Webinar participants can type in a chat or Q&A box and respond to poll questions, but they cannot be seen or heard. The presenter may be on video.

Best Practices for Virtual Meetings and Webinars

- Hold a dry run for the virtual meeting or webinar at least the day before with the meeting leader, presenter(s), moderator/producer and technology expert.

- The technology expect should be the meeting 'host' and the moderator/producer should be 'co-host' to ensure that the meeting does not end if the host loses internet connection.

- The presenter can control their slide if they'd like (determine that ahead of time) but the moderator/producer should have a copy of the presentation open on their computer so they can take over if the presenter loses their internet connection or has other technical difficulties.

- Virtual Meeting or Webinar Duration

    - 60 minutes is a standard duration for a virtual meeting or webinar. 30 minutes may be more appropriate depending on the meeting objectives. If going longer than 90 minutes, provide breaks each hour.

- Cameras and Audio

    - Presenters should use a headset for best audio quality and ideally be dialed in by phone. If the presenter is on computer audio, they should also be dialed in by phone (microphone muted and speaker volume off) as a back-up in the event that they lose their internet connection.

    - Presenters should have their video camera on. In a virtual meeting, participant camera can be turned off during formal presentations as the images can become distracting. Have participants turn cameras on for discussions

Webcam Video Tips & Best Practices

Using video may seen awkward at first, but it allows for greater engagement, communication and connection in a virtual meeting. Below are some simple best practices and tips that will help you get camera-ready!

Camera Placement
When your camera is too close and low, other participants spend the meeting looking up your nose... it's not a flattering angle for anyone!

- **Position your camera lens so that it sits at or slightly above eye-level** (but no higher than your hairline). You may need to place your laptop on a book or box to get the camera lens to the correct height.

- **Don't sit too close!! Position your webcam so that it is far enough away to capture your entire face and shoulders, ideally with a little bit of room to spare.**

Lighting

- **Lighting your face from the front with soft, indirect lighting is ideal. Avoid backlighting,** like a window behind you as it will make your face dark and shadowy. While the view out the window behind you is a nice background, you will look much better if you are facing the window during daylight hours.

- For a quick and easy 'masterclass' on video lighting, **see this** NY Times article

Background

- **Be aware of what's behind you!** Keep your background simple so that it's not distracting.

Make 'eye contact'

- **Look at your camera to make virtual eye contact.** It will help to make a stronger connection with the other participants. While it's natural to look down at your screen, in doing so it looks like you are gazing off elsewhere (and participants are then looking at your forehead!).

Test your Webcam Setup

- **Perform a test to make sure your webcam is set up and working correctly.** In Windows 10, type "camera" in the search box on the task bar and select the Camera app from the results. When the app opens, it displays a view window with simple controls and settings. Check your background, lighting, camera placement and adjust according to the tips above.