Job Aid: Leading Virtual Meetings

From Leadership Strategies, the experts in virtual facilitation training

Apply these 14 tips for leading effective virtual meetings - from planning to executing - to transform your virtual meetings and acheive better results.

Tips for Planning
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.

Tips for Starting
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.*

Tips for Executing
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.

For more tips on virtual meetings, including how to close with clarity and committment, visit us at www.leadstrat.com

Leadership Strategies
Level up.

If you're looking for hands on training in these tools and techniques of virtual group facilitation, take our Facilitating Virtual Meetings: Essentials course.