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# Virtual Meeting Checklist

## Step 1: Nail down the details

*Do this: 1-2 weeks before your virtual meeting*

### Technology and equipment:

- Identify your [meeting tools and tech](#).
- Learn how these tools work, including all capabilities.
- Share basic tool instructions with attendees.
- Choose a neutral/professional setting where you can host the meeting.
- Test your meeting tool on your computer.

### Engagement:

- Pick a short [icebreaker question](#) for the beginning of the meeting.
- Develop a short itinerary and an objective summary to send along with your meeting invitation.
- Set attendee expectations.

### Troubleshooting:

- Find a moderator to help with IT issues.
- Find a co-host to help with engagement.
- Commit to an “identify and eliminate” problem-solving strategy for unforeseen challenges.

## Step 2: Send meeting invitations

*Do this: 1-2 weeks before your virtual meeting*

### include:

- Meeting date and time
- Technological format
- Connection links and instructions
- Attendee expectations
- Meeting itinerary
- Meeting objectives

## Step 3: Send meeting reminders

*Do this: 24 hours before your virtual meeting*

### Include:

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- A request for everyone to test the meeting technology
- The details outlined in the original meeting invitation

## **Step 4: Conduct pre-meeting checks**

*Do this: 15 minutes before your virtual meeting*

- Sign in to your meeting with your fellow hosts and moderators.
- Check your microphone and speakers.
- Verify your meeting settings, including any attendee settings (muting/camera off) you want to have in place.
- Launch a waiting room if your technology allows.
- Review your meeting flow and itinerary one last time.

## **Step 5: Kick off your virtual meeting in style**

*Do this: At the start of your virtual meeting*

- Do a roll call to give everyone a chance to smile and greet one another.
- Deliver the icebreaker you selected in **Step 1**.

## **Step 6: Be the best virtual meeting host ever**

*Do this: During your virtual meeting*

- Stick to your meeting flow and itinerary.
- Use these strategies/techniques to make your attendees as comfortable as possible:
  - Smile.
  - Dress as you would for an in-person meeting.
  - Speak more slowly than you would in person.
  - Mute notifications for all your other apps.
  - Focus only on the meeting for its entire duration.
  - Speak clearly and into your microphone.
  - Extend pauses after everything you say to give people plenty of time to weigh in.
  - Make “eye contact” by looking into your camera.
  - Frequently ask if anyone has any questions or additional thoughts.
  - Take a group selfie (just a picture of your screen) every 15 minutes to cultivate attention and eye contact.
  - Speak with your hands to encourage attendees to look at you and make eye contact.
  - Avoid looking at yourself. (Hide your view if you must.)
  - Acknowledge speaker contributions with a silent nod.

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- Call on attendees who haven't had a chance to say anything.
- If your meeting is long, take breaks.

## **Step 7: Don't just end your meeting—close it**

*Do this:* Before you sign off of your virtual meeting

- Ask if anyone has any other thoughts to add
- Summarize key points
- Summarize next steps and clarify responsible parties
- Tell attendees you will send a follow-up email shortly so they know to watch for it.

## **Step 8: Follow up immediately**

*Do this:* After your virtual meeting concludes

**Include:**

- Meeting summary
- Next-steps summary
- Key meeting accomplishment.
- Recording (if applicable)
- Satisfaction survey link or simply a request to email you directly with feedback.