#ASK
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LIVE 30MIN Q&A SERIES

Best Practices for Effective Virtual Meetings
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Virtual Collaboration Tips & Tricks

Host Office Hours

- Create office hours during the day where the "door is open" for people to check-in, jump online for quick counsel

Leverage Chat, Text, Phone

- Not everything needs to be a meeting or email
- Use alternate forms of chat, text or calls for impromptu questions / discussions
- Chats especially help to reduce email #'s

Designate Overlapping Work-Time

- Depending how geographically spread out, designate core hours where everyone is online together

Recreate Team Pits & War Rooms

- For teams that are used to working side-by-side
- Duplicate through video or chat
- Log in together, work on mute and unmute to ask questions
- Create sub-group chats in teams

Virtual Coffees

- Many people not taking enough breaks, not getting "water cooler" interactions
- Book yourself informal coffee with peers or team members; Sit and chat to connect and share ideas with no agenda

Facilitate Brainstorming Meetings

- Brainstorming can still happen online
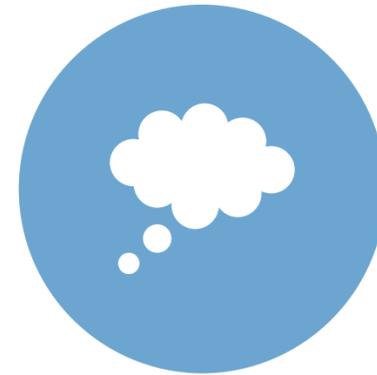- Share screen, or even position camera to focus on a physical whiteboard

Great Meetings: The Basics *(*critical for virtual and in-person meetings)*

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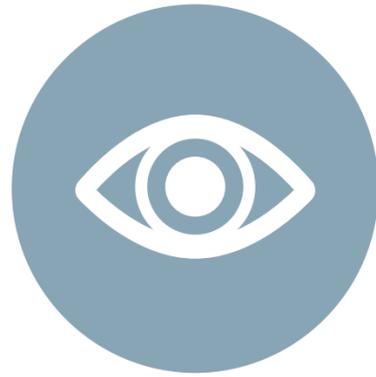
1. Have a Clear Purpose
Identify this. Outline it in the meeting invite so it's clear for participants. Ask as a participant if you're unsure about purpose or your role.

2. Identify Type of Meeting
Different meetings require different formats and lengths – plan accordingly. (e.g. formal, informal, operational, strategic, development)

3. Be Intentional about Attendees
Think about and specify who is required, vs. optional (ensure clear in invite). Politely decline if you're not critical and provide information using other channels.

4. Prepare Self & Materials
Spend the time as owner AND attendee to properly prepare for meetings.

5. Have a Chair
The meeting should have a clear owner leading the discussion, keeping things on track and on time.

6. Call on People
Be aware of members dominating the conversation; Pause and deliberately seek input of those who are quieter (especially virtually).

7. Clear Next Steps & Owners
Wrap up before the end of the meeting; summarize what was agreed upon; identify clear action items, next steps and owners.

Running & Participating in Virtual Meetings

Set-up
- Leverage tools - waiting rooms and/or password protection
- For important meetings, set an earlier call-in time (or base content on delayed start)

Focus on camera, not colleagues
- Look at video camera (black dot) – while odd at first, direct eye contact makes people feel more connected and engaged
- Practice when you can, even for brief moments in a meeting
- Put key points on post-its to left/right of camera, like teleprompter

Using dual monitors
- Keep participants on main screen with video camera
- If presenting, allows you to share separate screen in presentation mode and see your speaking notes on main screen

Frame and "light" yourself wisely
- Your proximity to the camera plays a big part in how audience perceive you; make sure your camera is close to eye level
- Head and top of shoulders should dominate your video window
- Be mindful of your background - distracting elements will pull attention away from you; Light yourself from behind the camera

Be present & mindful, use mute
- Easy on video to lose focus, forget you're being watched
- Keep away from checking email, phone or doing other work
- Mute when not speaking; Turn off the camera if you need to do something visually distracting

Leverage features – chat & whiteboard
- Chat window can be a support tool (post links or ask questions)
- Whiteboard and share screens to make it interactive on the fly (much like you would in a boardroom)

Enable speaker or gallery / grid views
- Many technology platforms have different ways to view participants
- Ensure people are set up on the one that makes the most sense for purpose of your meeting

Have a support team member
- If you're the host of larger meeting or session, be sure to have a support team member to help you manage the technology
- They can – post questions in chat, monitor chat while you're presenting, take notes so you focus on audience, let people into room, and manage any last-minute tech challenges

Practice with the technology
- Test and ensure you have strong internet/wifi for video
- Play around with the new tools and video conferencing technology in more informal meetings
- Have team members take turns bringing one new tip/trick each week to peers
- Ensure new participants know to download software and test ahead of meeting

Making Virtual Meetings Interesting

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Personal Check-In or Icebreaker to Start

- **Arrive early** as host
- **Greet people** as they join, engage in friendly small talk
- **Informal Meetings:** Make it personal (spend time at the start of meeting to check in on people, share stories), add humour
- **Formal Meetings:** Leverage a good icebreaker to lighten mood

Video for Connection

- Video **most closely mimics our in-person interactions** (vs. audio alone) and **increases connection**
- **Be clear on which meetings should be video** interaction vs. audio – don't all need to be
- **Let people know ahead of time** so they're not caught off-guard

Make it Interactive & Visually Stimulating

- **Minimize** presentation **length & content**
- Provide **background as pre-reads**; keep focus on discussion
- **Close presentation slide** to let **participants focus on each other** and conversation
- **Actively use features** – chat, whiteboard, breakout rooms
- **Creative design** for presentations – **minimal words** on page

Bring & Give Energy

- **"Eye contact"** - move people as close to your camera as possible, eyes travel less between faces and the dot
- **Smile as host/attendee** – it's infectious and transforms the interaction
- **Use and encourage upper body movement** – e.g. head nodding, hand motions, or thumbs up symbols **that provide feedback even on mute**

Looking to take it to the next level?

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