MAKE THE MOST OF ONLINE MEETINGS

Preparing for an online meeting requires a lot more than sending an invite and putting on a clean shirt. Here are a few tips to help you, your team, and your clients become experts at virtual collaboration.

1. TECH PREP

· Test the devices and applications you'll be using to make sure everything works
· Learn where the app's controls are so you can quickly and easily mute, adjust the camera, and respond to conversation threads
· Share the apps with all participants ahead of time, so they can download and test them too
· Make sure the device you're using is plugged in or has enough charge to get through the call
· Silence other devices if notifications may be disruptive

2. TEAM PREP

· Prepare and agree on a realistic agenda and use it to guide and time the meeting
· Designate needed roles amongst team members (lead facilitator, note-taker, tech support, etc.)
· Establish a backchannel for your team to discreetly communicate
· Have the team share content whenever possible; showing what you're talking about helps people stay engaged
· Everyone should have all documents they intend to share easily accessible or already opened

3. WORKSPACE

· Sit close to your wifi router if you often have connectivity issues
· Ensure your visible work area is uncluttered and looks professional—or use a virtual background
· Set up in a place you can focus undisturbed (maybe hang a sign asking for "Quiet, please" or "On a call until 3 pm", etc.)
· Have a refreshing beverage and a snack on hand

4. FACILITATION

· Ask people to use video
· Allow participants to introduce themselves via a simple icebreaker
· Establish rules of engagement at the start (e.g. should participants interject with questions or save them for the Q&A period?)
· Use specific information-gathering exercises to engage the group
· Pause speaking occasionally to allow others to join the discussion

5. COMMON ISSUES

· Mute yourself when not speaking if there is background noise
· That said... ensure that all voices are heard—monitor and respectfully engage the quiet folks
· If one person is having technical or user-error issues, have your tech support person direct chat them so the meeting can proceed
· If digital sharing starts to lag, ask participants to turn off video

6. OTHER TIPS

· Announce if you are recording
· Everything runs at ~80% speed when working virtually, even though your instinct is to blaze through things—slow down a bit
· Take breaks on long calls—people feel obligated to stay visible on camera, so "take 5" every so often
· Sarcasm and jokes can fall flat when delivered through screens, so be careful :-/