

TIPS FOR LEADING A VIRTUAL MEETING

Help avoid Zoom fatigue:

Start meetings at 5 minutes past the hour or half-hour (12:05, 12:35) and limit meetings to 45 minutes - whenever possible. Remember, not all discussions have to take place during the meeting. You can agree to call someone after the meeting for a more in-depth conversation. Do you need a video meeting at all? Pick up the phone and call if asking a quick question and use email to communicate short messages or share documents.

Agenda

Make sure every meeting has an agenda, and it is distributed to all participants *along with any relevant files in advance*, especially if there will be participants not joining by webinar. Nothing should be shared and discussed at a meeting unless everyone participating has a copy. (No - we'll send you a copy after the meeting...) You might add a question in the meeting invitation regarding how they will be joining the meeting, by phone or by video.

Introduce yourself and take a roll call (if applicable):

Begin the meeting by introducing yourself, stating the objective of the meeting, and giving instructions for audience involvement. (See - [Set the rules](#)) Take a roll call if you have participants phoning in to the meeting. This will allow all attendees to know who is participating.

Set the meeting rules:

Before the meeting begins, remind every one of the ground rules for participation:

- State one's name before speaking
- Keep background noise to a minimum; use the **mute** button when not speaking. Background noise, typing and paper shuffling can be distracting and confusing to all participants.
- Those gathered in a meeting room should remember the speakers can pick up sidebar conversations
- Callers should use handsets rather than speakerphone, whenever possible
- Video participants should use a headset and their cameras, when available.
- Encourage simple or plain backgrounds on video calls. Busy backgrounds can distract and, in some cases, bother participants.
- Speak loud and clear enough for all to hear
- For large groups, how and when to use the chat feature instead of a microphone to ask a question or make a comment.
- Keep comments concise and focused on the topic

Meeting helper:

For large meetings with phone attendees, ask someone in the meeting with you to act in the role of interpreter for those on the phone regarding non-verbal communication. ("She is pointing to the red circle," "We are laughing because...") They can also manage the chatroom if that is how video participants are required to ask questions. It is also important to take notes and provide meeting minutes or notes. Delegating this responsibility frees up the presenter to focus on presenting and not documenting.

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Remember this simple 3-step rule:

- Have and review the agenda
- Don't Be Afraid to Pause (to allow everyone to speak or use the chatbox)
- Summarize decisions and action items

Be direct:

"Please look on page 7, and we'll discuss the diagram..." is more direct and effective than, "The next diagram we'll discuss is found on the next page..." Using active, direct language will stimulate and hold your audience's interest.

Stay on schedule:

Be respectful of everyone's time and start and end on schedule.

Check-in:

Periodically throughout the meeting, check in to ensure the technology is working correctly, participants can hear, see slides, etc.

List all on the phone:

Keep a list identifying those who joined via phone or are not identified via video participation. This will remind the leader of who is not visible and to include them in the conversation. Call on people you have not heard from during the meeting to allow them to participate, especially if they do not have access to the chat feature.

Leader Responsibilities:

- Use Microsoft Team, Zoom, or other University supported tools whenever possible; make it easy for staff to locate relevant files and join the meetings virtually
- Set expectations for participation (unmuting, using the chat feature, etc.)
- Stick to the agenda
- Control interruptions by setting expectations and guidance on how to participate.
- Anticipate problems and be prepared with solutions
- Pause often to give all a chance to enter the conversation, call on those who cannot be seen to be included.

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Reach closure:

When preparing to close, do the following:

- Ask for summary statements
- Recap action items
- Thank everyone for their participation
- Use a formal sign-off to end the conference ensuring to say good-bye to the callers on the phone and those not using video

After the meeting:

Maximize productivity by forwarding the minutes of the meeting and any other pertinent material to all participants within a reasonable timeframe. Obtain feedback from the participants regarding the effectiveness of the meeting.



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