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Guide to Successful Virtual Meetings – a summary

1. THE SETUP

- Choose a tool, e.g. Skype, Zoom, etc.
- Use a headset, preferably with a with a USB plug. Alternatively a conference unit (e.g. Jabra).
- Use a camera, built-in or external.
- If possible, choose a network cable connection instead of WiFi.
- Use separate computers and avoid sitting in the same room as other participants in the same meeting.
- Place the camera at eye level in front of you and arrange so that your eyes are on the top half of the screen.
- Have a light source in front of you, and avoid having strong light behind you (e.g. a window or a lamp).

2. THE PREPARATION

- Make sure that:
 - The right people are invited and that they know why they are invited.
 - The meeting purpose is clearly defined.
- Assign someone (maybe yourself) to moderate the meeting – more important than in face-to-face meetings.
- Consider appointing a facilitator/side-kick for larger meetings, to help you keep track of chat-discussions, etc.
- When scheduling, keep in mind participants may be in different time zones.
- Send out an invitation with an agenda and meeting details well in advance:
 - Use calendar invitation (e.g. Outlook)
 - Give the participants clear instructions on how to join the meeting.
- Offer first-time users a chance to test in advance (at least one day before the meeting).
- Encourage the participants to join 10–15 min prior to the meeting.
- Support the participants:
 - Check that they use the right microphone, avoid breathing-noise.
 - Try cameras and adjust placing and light, if needed.
 - Chit-chat and drink coffee. This will make the participants feel at ease.

3. THE MEETING

- Start the meeting by summarising the purpose and going over the agenda. Let the participants introduce themselves.
- Turn camera on (if possible) and look into the camera when you speak.

- If the connection is slow, turn camera off.
- In meetings without video, announce who is talking.
- When using video, encourage participants to physically raise a hand when they want to speak.
- Use the chat function for enhanced interaction: questions, comments, sharing links, etc.
- Use the screen sharing function to show presentations, web pages, your desktop, etc.
- Use poll questions to collect opinions and engage participants.
- Mute the microphone during other participants' presentations, to avoid background noise.
- Keep track of who is in attendance and if someone leaves/falls out of the meeting.
- Take time to encourage participants to actively engage in the meeting, through speaking and/or chatting.
- Trigger interactivity by asking participants to answer questions or to comment on what you are discussing.
- During longer meetings, schedule in breaks and initiate small talk during the breaks.
- At the end, summarize:
 - Whether the purpose of the meeting was achieved.
 - What decisions have been made.
 - Who have been assigned tasks.
- Finish the meeting on time. If it looks like the meeting might run over, inform participants when it is likely to finish.
- Additional guidance to the moderator (and side-kick when applicable):
 - Virtual meetings benefit from good moderation. All meetings do but here shortcomings become more evident.
 - Set the right mood. Obviously this depends of what kind of meeting it is, but it is often productive if we also enjoy participating.

4. THE FOLLOW-UP

- Copy or e-mail the chat to yourself. Use for meeting minutes and/or Q & A:s.
- Distribute documentation to the participants, e.g.:
 - Meeting minutes
 - Presentations
 - Recordings
 - Q & A:s
- Maintain a constructive interaction between meetings.
- Set a date by which to follow up on meeting outcomes.