

Virtual Meetings & Events General Advice

Opportunities

Focus on the meeting goals and approach, not just the platform: the attributes of an in-person meeting don't guarantee that a meeting is effective or engaging. The same goes for virtual meetings. Time spent now thinking about how you want to facilitate your virtual session to achieve your objectives will be time well spent.

For example, you can increase participant engagement by:

- Actively surfacing questions that participants have
- Using polls to get a sense of the aggregate “temperature” of the room
- Inviting participants' answers to particular questions
- Having participants engage in small “buzz group” conversations

This is an opportunity to innovate. Although the virtual environment removes access to certain modes of meeting, it opens a number of new possibilities, some of which you may be able continue to use long-term.

Expectations

Set virtual meeting norms: if using Zoom to convene your group, circulate clear expectations around behavior – muting your line, having video on, etc.

Determine your priorities: as you think about your virtual session, consider what you can realistically accomplish. Will you emphasize some things and de-emphasize others in order to add engagement and accountability? How will you provide updates to people who cannot attend? Will you record the session, send notes afterwards?

Audio matters: use a good headset, ideally one with an attached microphone.

Time Zones matter: although your virtual session time won't change, think about the time zone your participants live in. Consider amping up your energy to stimulate theirs.

Send your Zoom link early: in order to avoid a last-minute rush, be sure to send out your Zoom meeting link at least 48 hours in advance of the session.

Make sure you have the most updated version of Zoom downloaded on your computer: The Zoom functionalities change and evolve frequently. Ensure that you can use full Zoom capabilities by keeping the application updated.

Engage a host: for larger sessions, ask a team member to play host. This person can mute/and unmute participants, troubleshoot technical issues, and monitor the Chat for questions.

Accessibility

Individuals have a range of abilities, and not everyone will disclose them. There may be participants with sensory disabilities. They are not required to tell you, and they may not feel comfortable telling anyone. Here are some things to consider:

Text is universal: assistive technologies (such as screen readers, magnifiers, etc.) are nearly always designed to work with text. If you send images/materials to your participants, include descriptions. If you use video chat, assign someone to create a transcript or send notes.

Some people need additional processing time: provide meeting notes, transcripts, or chat logs for later review. When you show images or videos via screen-share, provide those files to participants after the session.

Creating your materials

Put your slides in a consistent and distributable format (e.g., pdf).

Break up your presentation slides: be aware that online, perhaps even more than in person, people will read first and listen second. Consider PowerPoint's "Animation" feature (or equivalent) that allows you to show just a bullet or two at a time.

Presenting your materials: practice (at least once) in advance: rehearse using the Share Screen and switching among windows you intend to display. Remember to close all the windows or applications you won't be using (particularly personal email, apps with notifications, etc.) prior to the session.

Keep your normal pace: just because things are delivered electronically does not mean you should speed up or slow down. Your participants will still engage at the same rate. But you should check in with the participants more frequently than you might normally, to make sure that they follow the material and remain engaged.

Be visible: even when using Share Screen, it's good practice to make sure that your face is visible on a side screen while the materials are being displayed – otherwise, engagement can decrease.

Engaging participants

Having participants listen attentively while relying on a small screen can be challenging. Consider taking advantage of various features in Zoom to keep them engaged, such as Chat or invited Q&A (using Raise Hand). Encourage the use of video so that they can see you and others participating in the session.

Reading the room: unmuted participants can inadvertently start talking at the same time, you will not be able to read body language easily, and those less inclined to speak may disappear more easily. To address these issues, be more diligent about pausing and asking if anyone else has more thoughts before jumping to the next topic.

Invite and respond to questions: if your meeting normally includes Q&A, consider inviting participants to ask their questions in Chat. To help you not having to browse through all the questions in Chat in real-time, ask someone to act as host. Have them monitor the chat and work with you to surface questions for you to answer at the appropriate moment, or maybe every 5 minutes.

Post or send out the Q/A after: You might consider offering to post the questions and responses after the session and address any questions that you didn't have time to address during the session.

Session transitions: it may be harder than usual for participants to know when you have shifted between discussion topics, so be sure to state clean, well-defined transitions and refer to the meeting agenda.

Warm and cold calls: you can "cold call" a participant just as you would in the traditional meeting, instead of waiting for them to raise their hand. For "warm calls," you can message them privately in Chat before you call on them.

Raising hands: this feature works like the physical meeting space. Have participants use the Raise Hand feature in Zoom to answer questions. When you open the conversation to the participants, you can pause a beat to let a number of people raise their hand and then select who will speak according to whatever calling pattern you want. Call on a participant by name.

Polls (private or public): with Zoom's polling features you can get group results in real time, then reveal them later.

Buzz groups: consider giving participants more time than you normally would to formulate ideas jointly in one-on-one conversations (perhaps over Chat or in Zoom's Breakout Rooms), and then have them share those ideas into the broader discussion.

Collaborative problem solving and brainstorming: digitally annotate using the Whiteboards feature. Allow others in the session to annotate on the same board to share ideas and problem-solving methods.