

## **How to Run an Effective Virtual Meeting**

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Before the meeting, the facilitator should send an email invitation to all attendees with an agenda and any documents that support or explain the agenda items. Along with agenda, list who will be attending the meeting, and each person's role. Give detailed call-in instructions, including what to do in the event someone loses remote connection.

### **Sample Email to send at least one day before the meeting.**

1. The Purpose of the Meeting (What we will accomplish and why)
2. The Agenda
3. Supporting Documents
4. Log-in instructions, along with technical glitch information
5. Identify the Meeting Facilitator and their role
6. Group Ground Rules (e.g. everyone must contribute to the conversation)
7. Instructions to read the Agenda and support Documents PRIOR to meeting start

### **Sample Ground Rules.**

1. No multitasking
2. Be present, listen
3. Keep your phone unmuted unless told otherwise
4. If you have a question outside the agenda and discussion, email facilitator
5. Make sure everyone gets a voice
6. No talking over one another – harder to do with phone meetings
7. Be respectful

### **Instructions on How to Join the Meeting.**

1. Decide in advance what tool you will be using
2. Make sure everyone has access/login at least one day in advance
3. Facilitator will send log-in information and TEST the system before the meeting
4. Decide in advance what to do if technology does not work for one or more participants.

### **Meeting Checklist.**

1. Check equipment, sound, and log-in before the meeting
2. Make sure you have hardware to run the meeting including power cords, connecting cords, video camera and headset, other devices like mobile phones, tablets, USB drives, etc.
3. Book the space and equipment in advance, decide if you will provide any food or beverages (have them delivered to each person).
4. Do you need other help like IT, training, etc?

## **Some Facilitation Tips.**

Tips from Harvard Business Review article (2020), *Everything You Need to Run a Virtual Meeting*.

### **What to do when the group is silent...**

- Let's do a quick check in. Is there anything I need to clarify before we move on to the next agenda item?
- Anyone have anything else to add? Remember, silence can mean consent, so if you don't agree let's talk.

### **To recover after a tangent...**

- Let's put that one in a "parking lot" for now so we can focus on the agenda item
- Can we return to a comment that Mary made a few minutes ago?

### **When someone keeps making the same point...**

- Bob, you keep making the same point. What is not being addressed?
- I think further discussion is not helping us move this issue forward. Can we follow up with your concern in a separate discussion, offline?

### **When you catch someone multitasking...**

- James, what do you think?
- Or, remind everyone there is no multitasking, and go around the group and have everyone weigh in with an idea on the topic.

### **When there is a lot of background noise...**

- I'm hearing a lot of noise from someone. Can whoever this is occurring to mute your phone until things quiet down?
- Just a reminder to everyone that while we want you keep your phone OFF mute, if you are experiencing a log of background noise, it's ok to put yourself on mute. You may want to let the facilitator know in case there is a delay in response from you.

### **When you want to hear from someone who hasn't contributed much...**

- Josh, what has been your experience on this issue?
- Who else has had experience with this?

### **When someone violates group norms...**

- Pause the conversation and remind the group of the ground rules.
- Encourage group members to hold each other accountable to ground rules.