



# Baker's Dozen Virtual Meeting Best Practices

Chuck Roe

*The Meeting Place*

Meeting Facilitator · Consultant Master Trainer  
6630 N. Territorial Road, Plymouth, MI 48170

# Bakers Dozen Virtual Meeting Best Practices



1. Leading up to the Meeting
2. Nearing Meeting start
3. Dealing with questions
4. Doing demos
5. Finishing the Meeting
6. Closing applications
7. Starting times
8. Establishing the Meeting
9. Meeting advocate
10. Pre-Meeting slide
11. Introducing the presenter
12. Reinforcing the webinar(s)
13. Following up

# Leading up to the Meeting

- Meeting reminders
  - Email multiple times
    - (as a minimum)
      - 1 day before
      - 1 hour before

# Nearing Meeting Start



- Team member dials-in to make sure the number is working for participants.
  - Have this person send you a question so you know it's working
  - You can see how it will look inside the Meeting software

# Dealing with Questions



- Let the participants know in the introduction how you will be dealing with questions
  - Whether you'll respond to questions at the end
  - Try to take them during the session, etc.
  - Use of “chat box” or other features

# Doing Demos



- When doing a demo or showing software
  - Do not to move too quickly (or scroll up and down a web page too quickly)
    - Refresh takes time to complete depending on the user's bandwidth
    - Allow about 5 seconds every time you change your screen to allow participants see the change.

# Finishing the Meeting



- Have a definitive "stop" to the core material (within the time allotted).
  - Similar to Meeting etiquette for a face-to-face Meeting.
  - Participants that only planned on the Meeting schedule know that after the schedule end they are not missing something "core"
  - You can extend beyond the end time as long as the "officially scheduled program" has a clean end and those that need to leave can leave.

# Closing Applications

- Close ALL unnecessary applications
  - Especially Outlook, Instant Messenger, Lynx, etc.
    - You do not want any personal or confidential info displayed
    - You do not want to interrupt the webinar with pop ups or other notifications



# Starting Times



- Start 2 minutes past the scheduled start time
  - Gives people time to call in, but does not make those on time wait too long
    - Participants calling in a few minutes later usually do not miss much
    - Starting on time helps people show up on time for future webinars
      - Presenters are tempted to wait for more people to join. Be strong, don't do it

# Establishing the Meeting



- Call into the Meeting at least 15 minutes early
  - This avoids everyone hearing annoying beeps and other pre-Meeting sounds
  - It also tells participants they are in the right Meeting
  - Calling in early lets everyone will know they are in the right place

# Meeting Advocate



## Advocate for:

- Questions – repeat for others
- Chat comments – repeat for others
- Room environment – describe for others
- Posters or visuals on walls – describe for others

# Pre-Meeting Slide

- Use pre-Meeting slides & announcements
  - Put up a slide that says something like "the Meeting will begin in 10 minutes"
  - This allows participants logging in to know the Meeting software is working
    - Update the slide to show the actual time until the Meeting will start
    - Also make an announcement on the call every few minutes to let people know it will start soon and their audio is working.

# Introducing the Presenter



- Citing credentials
  - Be deliberate
  - Show respect
    - Body language
    - Use emotions for emphasis
    - Practice the introduction
  - Share personal information about the presenter

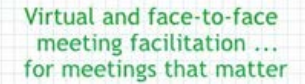


# Reinforcing the Meeting(s)

- Use multiple ways to connect with participants
- Always use a Microphone – it is for the benefit of the participants, not you
- Make participant dynamics and interactions positive
- Share the spotlight/recognize contributors

# Following Up

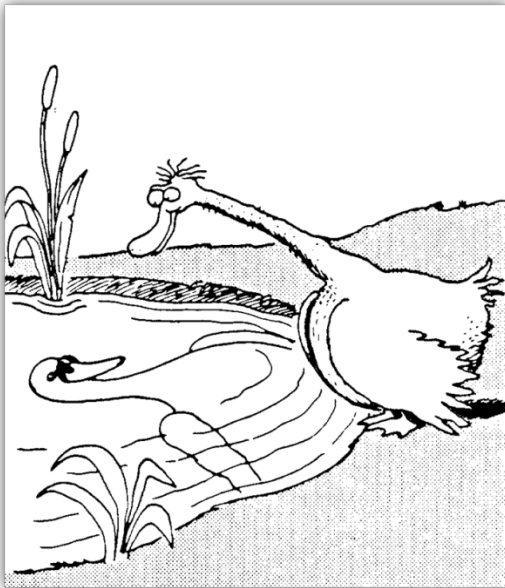
- Send out a recording, slides and Meeting minutes within 24 hours
- Tell participants during the Meeting you will do this
  - 10-20% of your attendees will email you looking for the info anyway
  - Fast follow-up helps motivate participants to take a next step while the Meeting is still fresh in their mind.





# Q & A

Reflection:



## Contact Information

**Chuck Roe** | Meeting facilitator · Consultant · Master Trainer

e. [cmrroe@gmail.com](mailto:cmrroe@gmail.com)

c. 734.895.5464

o. 734.223.5481

6630 N. Territorial Road  
Plymouth, MI 48170

# *Back-up Slides*

# EVENT

*“History is just one damn thing after another.”*  
*- Winston Churchill*

# Demo



- WebEx Meeting Demo
- GoTo Meeting Demo
- ZOOM Meeting Demo

## Wordle Content

Quality Malcolm Baldrige School of Business Post University Leading up to the Meeting  
Nearing Meeting start Dealing with questions Doing demos Finishing the Meeting  
Closing applications Starting times Establishing the Meeting Meeting advocate Pre-Meeting  
slide Introducing the presenter Reinforcing the webinar(s) Following up Meeting reminders  
Email multiple times look inside the Meeting software participant dial-in dealing with  
questions responding to questions demos software Refresh takes time Allow about 5 seconds  
for screen change Finishing the Meeting Meeting start virtual definitive "stop" virtual  
Meeting etiquette for an face-to-face Meeting Close ALL unnecessary applications Meeting  
schedule something core Outlook, Instant Messenger Meeting etiquette for an face-to-face  
Meeting Start 2 minutes past the scheduled start time future webinars 15 minutes early  
hearing annoying beeps and other pre-Meeting sounds right Meeting right place Meeting  
Advocate repeat questions repeat comments describe room environment describe posters  
describe visuals virtual pre-Meeting slides pre-Meeting announcements Meeting will start  
Meeting will start audio is working video is working Meeting will begin in 10 minutes  
Meeting software is working Introducing the presenter Meeting advocate pre-Meeting slide  
Citing credentials Be deliberate Show respect Body language Use emotions for emphasis  
Practice the introduction Share personal information about the presenter introducing the  
presenter reinforcing the Meeting Use multiple ways to connect with participants Make  
participant dynamics and interactions positive Share the spotlight/recognize contributors  
Meeting recording Meeting minutes 24 hours



# QUESTIONS?