

Setting up and Facilitating Successful Virtual Meetings

As TJCOG and many other organizations adapt to changes from COVID-19, we must adapt to increased use of virtual technology and meetings. Check out these tips and suggestions for making your meetings as seamless and valuable as possible!

STEP 1: Prepare the Functionality



- Only use technology needed. Don't over complicate.
- Video software is best for sharing screens or candid discussion
- No need for group discussion? Mute participants and utilize chat boxes.
- Want to share later? Set to record!

STEP 2: Make an Agenda and Guidelines



- Assess how information needs to be altered or presented.
- Use visuals, if possible.
- Provide time estimates for items.
- Identify questions that need discussion and decisions.

STEP 3: Test and Prep Equipment



- Test, test, test!
- Ensure functionality is set as needed (e.g. mute set or volume on, share screen options available)
- Encourage participants to log-in early.

STEP 4: Follow Etiquette Do's and Don'ts



- Provide a visual agenda or guidelines on screen.
- Offer additional time and pauses for feedback or questions.
- Speak slower than normal.
- Review with attendees how you plan to lead.

STEP 5: Engage or Facilitate Discussion



- Identify/engage those you know you need to hear from on specific items.
- Encourage chat box use for those less likely to speak up.
- Formalize the water cooler with collaborative chat at the end.
- Limit "speechifying" or one person speaking too much.

STEP 6: Identify Next Steps & Follow-Up



- Wrap up conversation deliberately - ensure agreement, open items
- Explain next steps
- Send out notes or written deliverables
- Encourage ongoing communication

Other Resources for Great Virtual Meetings

[10 tips for giving an effective virtual presentation](#)

[Improving your virtual meeting skills](#)

[7 ways to run a virtual meeting](#)