

## Tip #1: Plan Ahead



- **Learn about the platform and tools** - as the host/leader, people will look to you for help ([Zoom](#), [Blackboard Collaborate](#), [Microsoft Teams](#))
- **Provide clear instructions for joining a meeting** - including technical requirements
- **Have a back-up plan** - for technical issues (e.g. have a phone number to call if a participant can't get into room)
- **Consider privacy issues** and consult [Western's best practices guide](#)
- **Create and distribute an agenda** - to participants ahead of time along with any background information (e.g. [Team Check-In Agenda Template](#), [Project Check-In Agenda Template](#))

## Tip #2: Communicate Expectations



- **Communicate start time, preparation, and other important details in advance**
- **Use body language and encourage others to do the same** - smile, nodding, thumbs up, etc.
- **Consider shared signals for when someone is wanting to speak**
- **Speak out physical steps you are taking** – e.g. if you are looking for a document tell the group as you are doing it, if you need to step away say that and when you'll be back, silence is 'off-putting' and can disengage people
- **Have participants speak out if they cannot see or hear**

## Tip #3: Engage Participants



- **Encourage the use of audio and video**
- **Have roundtable introductions**
- **For smaller meetings, give everyone time on agenda**
- **Assign roles and tasks** - moderator, action item recorder, technological support for higher stakes or large meetings

## Tip #4: Make Use of Tools



- **Choose the right technology for the meeting and tool for the task**
  - Interaction tools
  - Screen sharing
  - Polls
  - Chat
  - Breakout rooms

## Tip #5: Be Flexible



- **Be okay with the fact that not everything will go smoothly every time**
  - People may drop off
  - People may talk over each other
  - People may have technical challenges
  - People may not be able to attend

### Additional Resources

Harvard Business Review – [How to Run a Great Virtual Meeting](#)

LinkedIn Learning – [Leading Virtual Meetings](#)

Professional Management Institute – [The Seven Secrets of Successful Virtual Meetings](#)

Forbes.com – [Virtual Meeting Tips](#)