Job Aid: Leading Virtual Meetings
From Leadership Strategies, the experts in virtual facilitation training

Apply these 14 tips for leading effective virtual meetings - from planning to executing - to transform your virtual meetings and achieve better results.

### Tips for Planning
**Before your meeting...**
1. **Distribute relevant information prior to the meeting** – including the meeting objectives, agenda, specified time zones of start/end times, and ground rules.
2. **Limit agenda items** so that the entire call can be completed in two hours or less. If necessary, break the meeting into several calls.
3. **Ask participants to submit preliminary input and ideas** before the meeting.
4. **Request for multiple people at the same location to assemble together** in a conference room or other suitable office/environment.
5. **Create a list that shows the name and location of each person** expected in the meeting.

### Tips for Starting
**At the start of your meeting...**
6. **Conduct a roll call.** Ask each person to state his/her name and location.
7. **Inform-excite-empower-involve** in your opening words:
   - Inform participants of the meeting purpose.
   - Excite them about their participation by explaining the benefits.
   - Empower them by letting them know the authority they’ve been given.
   - Involve them by asking a Type B question that engages them.
8. **Add any specific ground rules to assist with “remote meeting etiquette,”** such as the following:
   - **Announce yourself when joining or leaving the meeting.**
   - **Always identify yourself before speaking.**
   - **Avoid using the “hold” button.**

### Tips for Executing
**During your meeting...**
9. **Use round-robin frequently** to get input from everyone. Establish the order early and follow it each time.
10. **Establish a verbal method for doing consensus checks,** such as a round-robin, where each person indicates agreement or disagreement.
11. **Use a meeting software** that allows all participants to view on computer the information that is recorded while the session is ongoing.
12. **Do considerable summarizing and use frequent prompt and playback questions** to make sure that everyone is comprehending and focused.
13. **Review all issues, decisions and action items** prior to ending the meeting.
14. **Publish a re-cap immediately after** the meeting.

For more tips on virtual meetings, including how to close with clarity and commitment, visit us at [www.leadstrat.com](http://www.leadstrat.com)

If you’re looking for hands-on training in these tools and techniques of virtual group facilitation, take our [Facilitating Virtual Meetings: Essentials](http://www.leadstrat.com) course.