

## Tips for Virtual Meetings

This list of tips was developed based on NACDD's experience using Zoom for team meetings and small peer-learning groups. Access Zoom at <https://zoom.us>. Free accounts are available with limited participant capacity and length of meeting; paid accounts have more functionality and versatility. Many of the tips below also apply to other video-conferencing software that is available (both for free or for a fee).

- 1. Assign a facilitator.** Have one person who can answer questions about the meeting platform and who will be responsible for ushering the group through the meeting. You may also wish to assign someone to take notes.
- 2. Get participants on camera.** Having everyone attend a virtual meeting on camera makes the meeting feel much more like you are in-person and can increase engagement.
- 3. Provide dial-in and computer audio options.** It's helpful to provide a dial-in option to be sure people can connect to audio on their computer or on their phone.
- 4. Use introductions and icebreakers.** Reinforcing personal connections is particularly important in a virtual setting. For meetings where participants don't yet know each other, make sure to do introductions and icebreakers as you would in an in-person setting. For teams that know each other, a check-in can be done rather than an icebreaker.
- 5. Keep to your agenda.** Create a structured agenda (with input from stakeholders in advance if necessary) and stick to it. Along with this, set clear objectives and meeting ground rules. Outlining next steps—including timelines and responsibilities—as you go and at the conclusion of the meeting is also helpful.
- 6. Call on people.** Calling on individuals directly can help start the conversation and help eliminate talking over each other. You can alternate this with doing a "round robin" where everyone gets a chance to speak on a topic.
- 7. Take breaks—including physical activity breaks.** Just as for in-person meetings, participants need breaks to use the restroom, get snacks, and stretch. Model in-person meeting practices by taking a physical activity break with everyone doing the physical activity break on camera. Plan to take breaks approximately every 60 to 90 minutes for meetings longer than 1.5 hours.
- 8. Be mindful of meeting length.** If longer meetings are necessary, consider capping virtual meetings at four hours. If at all possible, hold a series of 1-1.5 hour virtual meetings rather than one long meeting to prevent burnout.

**9. Balance “sit and get” presentations with opportunities for interaction.** Consider capping presentations that are not interactive at about 20 minutes. Use the ideas below to invite interaction and connection.

**10. Use poll questions.** Load poll questions within your Zoom account before the meeting, and then launch the questions as you need them during the meeting. Poll questions can give a “pulse” from the group on a specific issue and/or you can ask a poll question and then use the results as a basis for more discussion.

**11. Use breakout rooms.** If you want to do smaller group discussions, Zoom allows meeting hosts to break meeting participants into smaller groups to talk within their own breakout rooms, and then bring everyone back together when ready. Follow this link, and other links on this page, to learn how to use breakout rooms in Zoom: <https://support.zoom.us/hc/en-us/articles/206476313-Managing-Breakout-Rooms>.

**12. Consider recording the call.** There may be some circumstances where recording a call won’t work, but when it does, consider doing so and sharing it out for those who couldn’t attend.

## Tips for Convening Stakeholder Groups

In addition to the tips above, you may consider the following when convening groups who are not yet familiar with one another, such as communities of practice or planning meetings with stakeholders.

**1. Embrace being beginners together.** Manage expectations by establishing a culture of experimentation. This gives you space to try out new approaches and lets the group know that you are open to observing, learning, and adjusting as you go. Solicit feedback from participants following the meeting and make recommended improvements.

**2. Create a “profile document.”** A reference guide for group members, such as a “profile document” that includes pictures, short bios, and contact information for each person participating in a virtual meeting(s) can help people connect and support one another outside of meeting times.

**3. Structure your agenda with questions rather than topics.** This makes it clear that the purpose of the meeting is to answer a number of important questions in the set amount of time. Allow responses to be shared verbally and via the chat feature.

**4. Ask group members to engage in a Networking Challenge between meetings.** If this group will be meeting multiple times, consider creating easy and fun networking challenges that participants complete between meetings to build group connections and cohesion. For example, participants could be challenged to reach out to two other people in the group to get assistance with a question or problem or to share a leadership or management resource that has inspired them.