

Checklist 8 Transform Virtual Meetings

Apply these **8 tips** to engage and empower meeting participants in the virtual environment.

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.*

We will be sharing more tips with you in the coming weeks.

To learn the complete techniques and tools for virtual facilitation, take one of our Facilitating Virtual Meetings courses. [Click here](#) to see which course is right for you.