Virtual Meeting Checklist

Virtual meetings and video conferences are becoming our new normal. As a sales leader, keeping your remote team and your customers engaged is more important than ever. The secret to running fun, motivating, and engaging meetings is in the planning. It is easier than you might think. Here are some key tips for creating a great virtual meeting.

Help Your Team Go Remote

▶ Set your team up for success

Tip: Have your remote team members set-up a home work space in a quiet location. It might be time to get creative! A small landing, a corner table, or a closet will work. They should have a laptop with a camera or an external camera, a headset, Internet bandwidth, and software applications that your company uses. Ask them to attend on-line training for your virtual meeting platform (Zoom, Skype, and Microsoft all offer free training videos).

▶ Co-create team norms

Tip: Work with your team to outline team norms. Examples of good team norms include; be sensitive to working hours if your team is in different time-zones, test the technology in advance of the meeting, be camera ready, be on video in a quiet area, stay on mute unless you are speaking, and no multi-tasking during videos.

▶ Be available and schedule regular check-ins

Tip: Schedule all recurring meetings (sales, lunch and learns, etc.) in advance. Have some fun with your meetings. Send your team Starbucks cards, coffee mugs, or coffee beans to enjoy together during your morning calls. Have a team member take charge of an ice-breaker at each meeting. Have a theme! Some ideas are: Bring Your Pet to Work Day, Dress-up Day, or change virtual backgrounds to your favorite city, family vacation, etc.

Plan Ahead to Have a Great Meeting

▶ The type of meeting will influence the virtual meeting settings

Tip: There are different meeting settings that can be applied in the meeting platform depending on your needs. As an example, in a Town Hall, you can share a video and record the entire meeting to send out later. In a collaboration meeting, you can turn on the Whiteboard setting to allow team members to write on the screen and then save and send it out after the meetings. You will find great examples of how to use these settings on the meeting platform resources/training and on YouTube.

▶ Send agenda in advance:

Tip: Your agenda should include a Purpose, Agenda, Logistics, and Outcome (PALO). Send your agenda and all pre-work at least 3-4 days in advance. Hint: Virtual meetings are a tough place to review a lot of metrics. Send the reports ahead of time so everyone can review the numbers and then come with insight, plans, etc. Have a pre-written meeting recap ready to go so you only have to update decisions made, next steps, etc. Have a PDF of your deck ready too. At the end of the meeting, you will be able to get your meeting notes out within a couple of hours.

▶ Assign roles to meeting attendees

Tip: Typical roles include Presenter, Moderator, Customer Manager, Tech Support

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Video Meetings With Customers

▶ Planning leads to customer success

Tip: A video meeting with a customer needs some additional planning and preparation. The customer leader should understand the customer's technology and preferred virtual meeting platform. Most major meeting platforms will work, but a customer's security software can sometimes create a challenge. Pro Tip: Work with the customer's Administrative Assistant to test the meeting link, video, speaker, etc. several days prior to the meeting.

▶ Bring your excitement to the customer

Tip: If the meeting is to showcase new product innovation, an annual business review, or new marketing programs, you will most likely have some samples or other marketing collateral. Don't leave these out of the meeting! Work with the Administrative Assistant to ship product samples, marketing collateral, etc. in advance of the meeting and ensure that it is displayed in the meeting room when your customer arrives. Pro Tip: Make this easy by packaging everything into a Meeting in a Box - complete with sales presentation, product samples, sell sheets, etc.

▶ Always have a back-up plan

Tip: Sometimes the technology won't work, the customer may get interrupted, or something else may go wrong. Hint: Have the presentation saved in a PDF file and your meeting recap written before the meeting! If the video connection doesn't work, simply email the PDF file and continue on a conference call. If the meeting gets cut short, send your meeting recap, as if the meeting went as planned, and ask for a brief call the next day to review the plan.

Meeting Settings That Help You Customize Your Meeting Experience

▶ Keyboard shortcuts

Tip: If you use Zoom more than once a week, there are a couple of keyboard shortcuts worth learning to save you oodles of time.

- I is for invite. Press Cmd+I (macOS) or Alt+I (Windows) to jump to the Invite window, where you can grab the link to the meeting or send invitations to others via email.
- M is for mute. Press Cmd+Ctrl+M (macOS) or Alt+M (Windows) when you are the meeting host and want to mute everyone else on the line.
- S is for share. Press Cmd+Shift+S (macOS) or Alt+Shift+S (Windows) to share your screen.

▶ Have a collaborative annotation session

Tip: Screen sharing allows the host of a call to display whatever's on their screen to everyone else on the call. Annotation tools let all the meeting participants draw and highlight what's on screen, which can be immensely helpful when discussing visual materials, such as mockups, graphic designs, and so forth.

- To annotate while viewing someone else's shared screen, select View Option from the top of the Zoom window, and then choose Annotate. A toolbar appears with all your options for annotating, including text, draw, arrow, and so forth.
- The presenter can use the save button on the toolbar to capture the complete image with annotations as a screenshot. You can also disable attendee annotation altogether.

▶ Other settings to explore

Tip: There are many meeting settings under Advanced Settings that allow you to further customize your meetings. Look for the following:

- Recording the meeting
- Creating a recurring meeting
- Changing your background on video to a virtual background
- Changing your profile