

VIRTUAL MEETINGS CHECKLIST

GOAL OR OUTCOME

MEETING CHECKLIST

PRE-MEETING CHECKLIST

- ☐ Create an agenda
- ☐ Set your stage
- ☐ Gather your props
- ☐ Send a reminder
- ☐ Silence digital distractions
- ☐ Share resources (links, docs, etc.) in advance

- ☐ Establish sense of place
- ☐ Assign a notetaker
- ☐ Ask participants to mute when they're not speaking
- ☐ Start with focus questions
- ☐ Speak up and articulate
- ☐ Build in breaks (for any meeting over 90 minutes)
- ☐ Look at participants (not the camera)
- ☐ Listen actively: focus on one thing at a time
- ☐ Send a follow up email with action items or slide deck for all participants



VIRTUAL MEETINGS CHECKLIST

TOOLS & RESOURCES

Platforms

- Zoom
- Google Hangouts
- UberConference
- Cisco WebEx
- Skype
- RingCentral

Features

- Screen sharing
- Virtual whiteboard
- In-meeting chat
- Conference recording
- Breakout rooms
- Google suite (drive, docs, sheets, etc.)
- Real-time polls
- Calendar integration

NOTES

