

## CREATING A VIRTUALLY IN-PERSON MEETING

Are you planning a virtual meeting instead of in-person? How about having that meeting ***Virtually In-Person***? With planning and preparation, there are ways for virtual meetings to feel more *in-person*.

### PLANNING THE MEETING

#### **Choose a platform with robust interactive capability:**

Several platforms allow for everyone to be on the screen at the same time Hollywood Squares style. **This creates a similar feel of having everyone around the table.** The ability to share screen allows you to show documents for everyone to consider. The ability to set up a poll in the middle of a meeting can be useful when taking votes. While not necessary for many kinds of meetings, having the ability to record is useful for presentations.

#### **Practice using the platform:**

You may have experience as a participant but hosting and facilitating a meeting adds some complexity. It's not rocket science, but it does take some practice. **Reach out to a colleague or friend and ask them to help you practice.** With your friend as 'participant,' practice sharing the screen, polling, changing participant names, adding a co-host, using the chat, taking 'flip-chart' type notes during the meeting, putting people into separate 'meeting rooms.' Whatever you think you'll need. The first time you use them in a meeting it won't be as smooth as it will ultimately become, but it will be better than if you hadn't practiced!

#### **Announce the meeting with clear instructions:**

In the meeting announcements, **include the link for the meeting**, even if you've sent a calendar invitation with the link. People use different calendars, and they don't all sync. **Include a trouble-shooting phone number** for them to text if they're having difficulty getting into the meeting.

#### **Plan to accommodate those with less computer literacy:**

In the meeting announcement, offer a time when you can **talk anyone through the logistics of using the video platform.** They'll appreciate it and you'll become even more familiar with the platform.

#### **Plan to accommodate those without video capability:**

**Find out if everyone has a computer camera.** If there are some without a camera, make sure you take that into account in your planning and facilitating. Frequently acknowledge their presence. Because others cannot see them, be deliberate about including them in the conversation; ask if they have something to add. Some participants may be able to see everyone but not be seen. Because they're not seen, the other participants may inadvertently talk over them. If they are calling in without any video capability, make sure to introduce everyone who is 'in the room.'

#### **Distribute agendas and other written materials in advance:**

**Email the agenda and materials to every participant**, with sufficient time for them to print them if they wish.

Emailing the materials allows participants to take their own notes as if they were together in-person, and ensures that those without video can follow along. You may also wish to share some of those documents on your screen as you use them.

#### **Consider having a co-facilitator:**

A co-facilitator can **respond to tech problems** during the meeting and can take over in case YOU have tech failure.

**Clear your desktop of extraneous tabs; Open the documents you want to share; Open the blank note-taking document:**

Whether you intend to share documents or not, there's a possibility you will want to. It's good **to get in the habit of closing every application except the ones you need for the meeting.** If you know you will (or may) want to share documents, have them already open before the meeting starts. A quick tip: In PC's using Microsoft, you can switch between applications with Alt-Tab. In a Mac, it's Command-Tab.

**Quiet your space; Use headphones or earbuds with microphone:**

If you're someplace with other people (or dogs!), **it's a good habit to close your door.** Using headphones or earbuds with microphone makes it easier to hear and be heard. This is especially true if you're the host of the meeting. You can mute others if you have to, but you don't want participants distracted by your pet.

**DURING THE MEETING**

**Create informal schmooze time before the meeting starts:**

**Schedule a 'gathering time' before the start of the meeting.** Invite attendees to join the meeting 15 minutes early to chat with each other as people gather. Just like in-person meetings, these few minutes before getting down to business helps maintain the important relationships between people. Remember to accommodate those without video capability with introductions and inclusion in the conversation.

**Briefly review the meeting platform:**

Most platforms have similar capabilities, but how to use them may differ. **Take a few moments to review the capabilities,** such as: how to see everyone on the screen, how to use the chat, how to mute themselves.

**Review the agenda:**

Yes, I know you sent it out in advance, but someone may not have opened it. Share the screen and show the agenda. **Read the agenda aloud for the non-video participants.**

**Start the meeting!**

You've done all the up-front work, now you **can run the meeting.** Remember to clearly announce which documents you're referencing. If you share a document, remember to frequently announce where in the document you are. If you are taking notes in a document that is visible to participants, occasionally review what you've entered; video participants can't scroll up the way you can, and those without video can't see it.

**ENDING THE MEETING**

**Confirm assignments:**

Conclude the meeting confirming any decisions that have been made and any assignments that have been accepted.

**Encourage socializing:**

Once adjourned, leave the platform open for a few moments. The schmoozing that usually occurs at the end of a meeting continues the camaraderie that started before the meeting began. If you need to have another meeting with a few participants members, wait a few minutes before you ask people to leave. These opening and concluding conversations are the social lubricant that helps team members build their relationships.

**ASK FOR HELP**

I'm happy to help if you'd like some more specific tips, or if you have a more involved meeting and would like to talk about a Virtually In-Person facilitation. Contact Susan Detwiler at [sdetwiler@detwiler.com](mailto:sdetwiler@detwiler.com), or 302.463.0327.