

Guide for Planning and Hosting an Effective Virtual Meeting/Training Event

Introduction

Purpose: A successful online training event has prepared participants, built-in interactivity, and is delivered effectively by the facilitator(s). This guide is designed to lead consortium/network partners in conducting a successful virtual meeting. It includes recommendations for what to do before, during, and after an online event, as well as tips for engaging a virtual audience.

What is a virtual training? Cindy Huggett defines a virtual training as, “A highly-interactive, online, synchronous facilitator-led class, with defined learning objectives, with participants who are connected individually from geographically dispersed locations, that uses a web-based virtual classroom platform.”

Provided by



Note: This guide was originally commissioned by the Georgia Health Policy Center (GHPC) as a resource for their technical assistance providers working with rural leaders and health professionals. GHPC has granted Vivayic permission to adapt and widely share this resource. Thanks to the leaders at GHPC for their generosity.



Before the Meeting/Training Event

1. Familiarize yourself with the audience

- Review the details of the project or event, work plan, evaluation plan, and any other available information

2. Have a conversation with the team or stakeholders to discuss desired outcomes and logistics

- Hop on a phone call and confirm:
 - Intended meeting outcomes
 - Individual roles and responsibilities, as well as who should attend
 - Content of the agenda
 - Meeting guidelines
 - Length of the meeting
 - Staying present
 - Video expectations
 - Muting
 - Chat function
 - Appropriate room layout
 - Pre-work expectations
 - Technology requirements
 - Meals/refreshments for anyone gathering in-person
- Customize any and all aspects of the session to the needs and specifications of the audience.

3. Choose the right meeting tool for the job¹

- Ask yourself, “What is the key functionality I need for this remote meeting to be successful?” and “How many people need to be involved in your remote meeting?” The tools that are most effective for a one-on-one virtual chat aren’t necessarily the same tools as those that are most effective for running a meeting with 20 remote workers spread across different time zones. Make sure the meeting software you choose can accommodate a large number of attendees without going haywire.
- Top meeting and conference tool options:
 - i. [Zoom](#)
 - ii. [WebEx](#)
 - iii. [Adobe Connect](#)
 - iv. [GoToMeeting/Webinar](#)
 - v. [Google Hangouts](#)
 - vi. [Microsoft Teams](#)

4. Schedule the meeting

¹ <https://slackhq.com/ultimate-guide-remote-meetings>

- Figuring out how to get everyone where you need them to be in the context of the meeting can be a struggle, especially if you're working with a remote team that's spread across multiple time zones.
- If possible, it's always best to schedule meetings far in advance—the more notice everyone has, the less likely people are to have scheduling conflicts.
- Use tools to help assist you with your scheduling efforts:
 - i. [Every Time Zone](#) has a slider that allows you to see what time it is across time zones.
 - ii. [World Clock Meeting Planner](#) from timeanddate.com allows you to input your team members' different locations and then creates a table of suggested meeting times.
 - iii. [Doodle](#) has a scheduling tool that allows you to create polls with potential times and send them out to your guests to collect their availability.

5. Build out agenda and develop facilitation plan

- Use this guide and agenda discussed with the team to develop a facilitation plan for the virtual meeting.
- Build in time in the beginning for introductions and community building, as well as at the end for reviewing outcomes and clarifying next steps.
- Allow time for breaks if the meeting is longer than one hour.
- As you develop the agenda, be mindful of the audience size, their experience with technology, etc. Any of the tools included in this guide can be used to facilitate a virtual session of any size. Whether the group is small (e.g., five or less attendees) or large (e.g., over 20), the tools will help encourage engagement and participation.

6. Send out the pre-work

- Pre-work is a great data gathering and information practice that doesn't require real-time interaction.
- Email the attendees directions at least two weeks before the meeting.
- Send the agenda out with the pre-work so people know what to expect.

7. One week before the meeting...

- Confirm you are familiar with how to operate the meeting software from both the presenter and participant's perspective
- Confirm all of your attendees will have access to the required technology

8. 24 hours before the meeting...

- Email attendees
 - i. Meeting agenda
 - ii. Meeting guidelines
 - iii. Web link and passcodes to connect to meeting
 - iv. Reminder about completing any pre-session assignments
- Print out agenda and facilitator plan
- Confirm computer software is up to date

9. 30 minutes before the meeting....



- Test all technology (including camera/video, Wi-Fi, and screen sharing) before the meeting
- Turn off all notifications and make sure your cell phone is on silent

Materials and Logistics: These are potential equipment and materials needed for conducting a virtual meeting.

TECHNOLOGY	MATERIALS	HANDOUTS
<input type="checkbox"/> Access to the internet <input type="checkbox"/> Meeting login information <input type="checkbox"/> Computer with video access <input type="checkbox"/> Hands-free headset <input type="checkbox"/> Computer charger <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> Printed facilitator's plan <input type="checkbox"/> Power Point presentation <input type="checkbox"/> Printed agenda <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> Strategic plan template <input type="checkbox"/> Goals and Objectives worksheet <input type="checkbox"/> SWOT worksheet <input type="checkbox"/> TOWS Analysis handout <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

During the Meeting/Training Event

- Establish meeting norms and guidelines
- Recordings
 - If you do record the training, let people know at the beginning of the meeting and share the purpose of the recording.
- Tips for using Zoom
 - **Virtual background.** The virtual background feature allows you to display an image as your background during a Zoom Meeting. You can also upload your own images as a virtual background. There are no size restrictions when adding your own virtual backgrounds, but we recommend cropping the image to match the aspect ratio of your camera before uploading it. [Learn more here.](#)
 - **Polling.** The polling feature in Zoom Webinar and Meetings allows you to create single choice or multiple-choice polling questions for your webinars. You will be able to launch the poll during your webinar/meeting and gather the responses from your attendees. You also have the ability to download a report of polling after the webinar/meeting. Polls can also be conducted anonymously, if you do not wish to collect attendee information with the poll results. Learn more about polls in [meetings](#) and [webinars](#).
 - **Whiteboard.** The whiteboard feature will allow you to share a whiteboard that you and other participants (if allowed) can annotate on. [Learn more here.](#)
 - **Breakout rooms.** Breakout rooms allow you to split your Zoom meeting in up to 50 separate sessions. Breakout room participants have full audio, video and screen share capabilities. To learn how to create, assign, prepare and manage a breakout room [watch this video.](#)
 - Other helpful features you can activate with the click of a button:
 - Dual monitors/side-by-side mode
 - Copy invite URL into clipboard once meeting starts
 - Gallery view of 49 participants per screen
 - Display participant name on their video
 - Record to cloud
 - Two-way file transfer
 - Co-hosts
 - Nonverbal feedback
 - Notifications for keywords
- Tips for engagement
 - **Make time for casual conversation.** Spend a few minutes at the beginning of the meeting having friendly conversation before diving into the meeting. This can help build the necessary rapport for a successful meeting and keep the attendees engaged when the conversation switches to business.



- **Have everyone introduce themselves.** Having everyone introduce themselves at kickoff (and especially before someone speaks or presents) is a good way to help everyone keep track of different team members and how they're contributing to the meeting.
- **Assign jobs.** You can increase engagement by giving attendees jobs that are interactive, straightforward and frequent. Examples include writing down any questions that come up during a brainstorm, taking notes on key discussion points, and managing the slide progression during the presentation. You can rotate jobs as necessary.
- **Use video and photos.** The more visual the better. An interesting video or photo can capture your participants attention much better than a paragraph of text on a slide can.
- **Give equal opportunity to talk.** If there are people in the meeting who are less comfortable speaking up, you can structure the meeting so that their voices are heard. Ex: round-robin-style discussion where everyone has three minutes to share.
- **Take breaks.** It's difficult to stay engaged when you need to grab a snack to eat or you're thinking about an email you need to respond to. Take breaks throughout longer meetings for attendees to take care of their personal needs so they can be fully present during the meeting.
- **Keep cameras on and mute off.** Using video cameras humanizes everyone in the meeting and adds a layer of accountability to be present. Setting the expectation for everyone to be unmuted requires a level of focus and invites collaboration and contributions from the group.
- **Share notes being captured.** Capturing notes on the screen during discussions is important so people feel like their ideas are heard and acknowledged. Pro tip: Change Word's view mode to Web. You don't have to fight page breaks and scroll to the left or right as you make text bigger or smaller.
- **Facilitation tips**
 - If you will want participants to share their responses with a partner or the group, let them know that as they begin the task so they can be prepared with an answer.
 - To increase urgency when participants are completing a task you can provide a time allotted to complete the tasks. Then you can provide benchmarks of the time remaining.
 - Make sure the directions are on the PowerPoint slide.
 - Wait about 5 seconds after you ask a question for people to respond. If no one responds, try rephrasing the question.
 - If you ask a question and no one responds you can also ask participants to put their answers in the chat first, then you can ask attendees to expand on their idea.

11 Tools to Transform Your Online Trainings

Platform	Description	Best Use Case	How to Use
Google Docs	Real-time collaboration and document authoring tool	Collaborative editing, brainstorming	Create a new document before the meeting. Get the link to your document and paste it into your meeting.
Dropbox Paper	Real-time collaboration and document authoring tool	Collaborative editing, brainstorming	Review the Dropbox Paper guide for details.
Microsoft Word Live	Real-time collaboration and document authoring tool	Collaborative editing, brainstorming	Create a new document before the meeting. Get the link to your document and paste it into your meeting.
Etherpad	Real-time collaboration and document authoring tool	Collaborative editing, brainstorming	Read the Etherpad blog for more details.
Padlet	Real-time collaboration tool	Collaborative editing, brainstorming, content curation	Read the FAQs here .
Conceptboard	Online brainstorming whiteboard	Mind mapping, brainstorming	Read the FAQs here .
Stormboard	Online brainstorming whiteboard	Mind mapping, brainstorming	Review this information to help you get started.
Coggle	Online brainstorming whiteboard	Mind mapping, brainstorming	Learn about the tool here .
Lino	Online sticky note service used to post ideas on an online web canvas	Individual idea sharing, brainstorming	Create a new board before the meeting. Get the link to your board and paste it into your meeting. When it's time to brainstorm, ask everyone to first type their ideas in a separate document. Then, take turns creating one note for



Note.ly	Online sticky note service used to post ideas on an online web canvas	Individual idea sharing, brainstorming	each idea. To group similar ideas, either just drag them on top of each other in layers or draw a box around them to create a group. Stickies within the box can be moved around together, and you can add a label for the group. Once you have your groups set, ask everyone to vote for their favorites. You could do this by adding Xs to the text.
Poll Everywhere	Real-time online polling service	Polling	See this PDF for tips and best practices.



- Virtual activity ideas²
 - Icebreakers
 - **Picture and a story.** Choose an object (e.g. shoes, favorite car, sentimental object, etc.) and have attendees take a picture ahead of time and email them to you or put them in the chat. Have everyone go around and tell a story about their object. Pull the pictures into your PowerPoint if you're sharing the photos.
 - **Ask a social question.** Ask everyone the same question to learn more about them. Example questions include: What are some of your favorite holiday traditions that you did while growing up?; What's your favorite book and why?; What are you grateful for? Share the question on a PowerPoint slide or on an online whiteboard.
 - **Two truths and a lie.** Ask each participant to think of two true facts about themselves and one lie. Go through each person and have them share their three "facts" and the rest of the team has to guess the lie.
 - **Count off.** Assign a number ahead of time to everyone, then show a directions slide. Ask participants to introduce themselves by sharing their name, organization, role in the project and an answer to one of the questions on the slide.
 - Childhood hero (real or fictional)
 - If you could have one dish/food item prepared especially for you
 - Best trip/vacation
 - Favorite movie or book
 - Greatest phobia/fear
 - If you had a theme song
 - If you could live anywhere
 - Your superpower
 - **Empty your cup.** Ask participants to introduce themselves by sharing their name, organization, role in the project, and emptying their cup. Emptying your cup is used to give participants "permission" to share what might be top of mind and rid themselves of much of their pent-up emotions and energies so that they can create more space in their "cup" to take in all that will be offered in the meeting. So what did you come in the room today with on your mind: that huge report waiting for you when you get back to the office, a child you're preparing to send off to college... Whatever it is, the idea is that if you can give

² Huggett, Cindy. Creating Engaging Virtual Training Using Zoom.
https://www.dropbox.com/s/pwfw3nkbzem2tpo/ls19_711_huggett_handout.pdf?dl=0



voice to it, you can release it (just for the next few hours) and give yourself room to focus on the meeting at hand.

- **Numbered agenda.** Share a numbered agenda on your screen and ask participants to type in two numbers in the chat that correspond to where they want to spend the majority of time.
- **Levels of proficiency.** Set context that allows participants to feel like they can be honest about their level of proficiency. Then show four levels (A, B, C & D) of proficiency and ask participants to type in the chat where they are on the spectrum. This allows the facilitator to tailor how in depth to go on certain topics.
- **Matrix questions.** Use the “plotting” feature in Poll Everywhere to upload an image of a matrix. Have participants click on one of the four quadrants as you ask questions. E.g., Which quadrant represents where you spend the most time? Which quadrant has the most opportunity for growth in your organization?
- Brainstorming
 - **Small group scenarios.** Share a scenario on the screen. Ask participants to work together on solutions. Either use breakout groups or a simple virtual whiteboard with dividing lines. Encourage networking, brainstorming and learning.
 - **Red light - Green light.** To help participants apply their learning, have them create an action plan. Then, go a step further on a virtual whiteboard... in its, “red light” area, list what could “stop” them, and in the “green light” area, how to overcome those.
 - **Private pair discussion.** When you want participants to discuss a topic, turn on private chat and assign them into pairs. Invite partners to find each other in private chat, raise their hand to indicate they are ready, then share the discussion question. Allow 2 minutes for private chat, then debrief the activity.
 - **Sticky note brainstorm.** Use Lino, a free sticky and canvas service that requires nothing but a web browser, to brainstorm ideas. Share your screen and have participants post a sticky note with their thoughts to your prompt.
- Decision-making
 - **Share context.** Decision-making is situational in nature. Depending upon the type of decision at hand, use discussions and whiteboard or brainstorming tools to share ideas and context.
 - **Create and/or present options.** If you’re working to generate solutions for a situation, use any of the feedback gathering tools listed (e.g., chat feature, whiteboard tools, etc.).
 - **Making the decision.** After all options are shared/discussed/created, use any of the tools to gather participant input (e.g., Poll Everywhere, etc.).

- Quizzes/summary
 - **Polling for points.** Use a series of poll questions throughout the entire virtual training class using the Zoom polling feature or Poll Everywhere. Each question has a point value. Invite participants to keep track of their own points and award “virtual prizes” at the end for most points. (Fun for team competitions, too!)
 - **Sentence starters.** Post a list of “sentence starter” phrases on the screen and ask participants to finish each statement. Get creative and have fun with these statements.
 - **Fact or fiction.** Similar to “Two Truths and a Lie”, share three pieces of information (e.g., statements, phrases, definitions, etc.). Participants will determine which points are fact and which are fiction.
 - **Q&A.** To kickoff Q&A, create a numbered list with questions you would expect people to have and then ask participants to type the corresponding number in the chat. Start the Q&A with the first question someone types in. This saves you from potential crickets in the very beginning and gives people time to think of their own.
- Feedback
 - **Process the meeting in the meeting.** Go around and have everyone share their thoughts on the meeting before closing. What challenged you? What are you concerned about? What do you think went well? Asking questions like these or simply opening it up for people to express themselves, brings the water cooler-type conversation that people would have after a physical meeting to life.³

After the Meeting/Training Event

- Send out brief meeting notes to the attendees and ask for corrections/additions.
- Post and/or share meeting resources
- Follow up on tasks and check in with the people assigned to do them before the items are due
- Seek feedback from participants to help engage them in making sure the next meeting is even more successful. You can send a brief follow up survey to easily collect feedback.

³ <https://hbr.org/2015/03/how-to-run-a-great-virtual-meeting>



Disclaimers and Notes

All always – use good judgment and consider the culture of your team and organization when planning a meeting. No one way is the “right” way. The suggestions shared in this document are provided as a resource and should not replace any standard operation procedure or policy of your organization.

The products and tools listed in this resource are examples. This is not an endorsement or guarantee of their effectiveness. Neither Vivayic nor Georgia Health Policy center has a financial relationship nor receives any benefit from the products and tools listed.

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