A Guide to Effective Meetings—In-Person and Virtual

Often throughout our career, we are asked and expected to be able to facilitate meetings. In the face of the COVID-19 pandemic and the current telecommuting culture, many of us are faced with the prospect of having to facilitate meetings online, perhaps for the first time.

There are a number of challenges to running these virtual meetings—from technology glitches (or lack of expertise) to at-home distractions, and everything in between.

While facilitating an online meeting may seem daunting, the same best practices that apply to in-person meetings can also be applied to virtual meetings. These fall into four categories:

- Meeting Roles & Responsibilities
- Meeting Preparation
- Meeting Facilitation
- Meeting Follow-Up

Meeting Roles & Responsibilities

The key roles associated with effective meetings are the same for in-person and virtual meetings. In any meeting, there are four key roles: leader (chair), facilitator, timekeeper, and recorder. In a virtual meeting, it is helpful to include two additional roles: tech keeper and chat monitor.

It may be tempting to take on all of these roles yourself; however, by enlisting support from others, you won’t have to worry about the technology and running the meeting.

You may want to request support or assign roles and provide expectations ahead of the meeting. Otherwise, you can ask for volunteers at the beginning of the meeting.

Key Roles

Leader (Chair)

As the leader (chair), you convene the meeting. Before sending a meeting invitation, determine what technology you will use to convene the meeting (e.g., Microsoft Teams or Webex). Send the invitation from that tool, and include all the information participants will need to join the meeting.
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If this is the first time participants are joining a meeting online, you may want to:

- Include a link to basic information about the tool being used. You can find some resources here.
- Give everyone time and tips to get familiar with the tool at the beginning of the meeting. Or, plan on opening the meeting 5-10 minutes prior to its start time, and let participants know they can join early for this purpose. We created some introductory slides with tips for using Microsoft Teams (PPT) and tips for using Webex Meetings (PPT), which you can copy and paste into your own presentations.

**Facilitator**
The facilitator keeps the discussion and decision-making process moving along.

You should review the meeting objectives with the facilitator, and together determine which tool allows you to best meet those objectives. For example, if the meeting objective is to check in to ensure everyone is doing okay, a video conferencing tool is probably the right choice.

To select the best tool, you should also consider the number of participants and how much discussion or how many questions you expect. The facilitator should decide how to take these questions. Video conferencing tools allow for participants to “raise their hand” or submit questions via chat.

**Timekeeper**
The timekeeper ensures participants stick to the time allotted for each agenda item. They remind the group when time is almost up for a given item.

If the timekeeper is assisting either you or the facilitator, they should establish ahead of time how they will alert you that time is expiring. This may be as simple as the timekeeper unmuting their audio and announcing the time at critical moments. Or, they can use the private chat function within the tool to alert just you or the facilitator.

**Recorder**
The recorder (note taker) captures important items such as decisions made, questions to be answered at a later date, and action items.

Depending on which video conferencing tool is being used, there may not be a need for a recorder. Some tools allow you to record the entire meeting. If this is not desirable, you could ask participants to submit proposals and questions in the chat function. The chat can be saved, thus creating a record of what was discussed.

**Chat Monitor**
The chat monitor keeps an eye on the chat box and calls out comments that are related to the agenda item.
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Tech Keeper
The **tech keeper** assists those who might have technical issues so you can continue to tend to the meeting (this should be someone who has experience with the platform). This person can also watch for participants who raise their hands, initiate polls, etc.

Meeting Preparation
The preparation put into a meeting determines how effective (and productive) it will be. Virtual meetings require even more preparation to accomplish objectives with the available technology.

Steps to Prepare for a Virtual Meeting

**Choose the Technology**
Inevitably, some meetings will be impromptu or called on an emergency basis. But if you are scheduling a meeting in advance, give some thought to where you will hold the meeting. Because everyone at UW–Madison has access to Outlook 365 (which includes Microsoft Teams and Webex), using one of these tools ensures your participants can join. (Webex also allows guests to join, so if your meeting participants will be both internal and external to the university, you may want to use Webex.)

**Schedule the Meeting**
Both Microsoft Teams and Webex integrate with Outlook calendars, so you can schedule the meeting by creating a calendar invitation directly within the tool. This is optimal for a couple of reasons:

- Participants can join the meeting from the calendar invitation itself (leaving no doubt as to whether they are joining the right group at the right time).
- You can use all of the functionality of Outlook, including changing the meeting time and attaching meeting materials to the calendar invitation.

Communication in virtual meetings can get challenging as the group gets bigger. Consider inviting the key people who should be participating as “required” and extending “optional” invitations to those who just need to know about the meeting. This signals to the optional attendee that they shouldn’t expect to have to play much of a role but still allows them to hear the information firsthand.

*Note:* If this is the first time that many of your participants will be using the technology, or if they are new to it, you may want to provide a brief overview or direct them to the appropriate beginner resources: [Getting Started with Microsoft Teams](#) or [Getting Started: Webex Meetings](#).

**Create an Agenda**
Creating a meeting agenda helps ensure you are able to cover everything you need to and participants come prepared (assuming you send the agenda out ahead of time).
Here are some tips for creating a meeting agenda (you can download this template to use):

1. **Clarify meeting objectives.** What do you need to cover? What do you hope to accomplish? How you structure your meeting should be aligned with your objectives. For example, you might want to:
   - Inform participants.
   - Get information from participants.
   - Consult participants on decisions.
   - Engage participants in collaborative decisions.
   - Develop connections or build trust.
   - Establish a sense of cooperation or teamwork.

2. **Consider how to accomplish each objective in virtual space.** For example:
   - If you are simply informing participants, you could do this via email, unless you also want to get their reaction and/or feedback.
   - If you are interested in participants’ reaction and/or feedback, you may want to use a structured approach like the Focused Conversation method.
   - If you want to engage participants in collaborative decisions, you’ll likely want to include features such as polling.

3. **Estimate how much time each agenda item will take.** Especially as people adjust to new technology and telecommuting, you may want to allow extra time for agenda items.

4. **Avoid an overcrowded agenda.** A typical agenda for a one-hour meeting might have 2-3 substantive agenda items (more if they are largely informational or if a brief consultation will suffice to meet your objectives).

Once your agenda is prepared, post it in the meeting invitation or send it out to participants (make sure participants have the agenda far enough in advance to properly prepare for the meeting).

**Test the Technology**
Test the technology a day or two before a virtual meeting. This includes:

- Checking video and audio capabilities.
- Ensuring you know how to use relevant features, such as sharing screens and documents, using the chat box, and muting participants’ audio. For help, here are:
  - Tips for using Microsoft Teams (PPT)
  - Tips for using Webex Meetings (PPT)
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- You can use the polling function to ask simple questions that are then documented. For information on how to do this, see:
  - How to use polling in Webex.
  - How to use polling in Microsoft Teams.

Meeting Facilitation

Two of the primary goals of meeting facilitation are to maximize the engagement of all participants and to ensure that the time spent is productive. The following best practices can help facilitators meet both of these goals. For additional tips on facilitating virtual meetings, see 12 Tips for Facilitating an Online Meeting.

Best Practices

**Start and End on Time**

Starting and ending a meeting on time is important for a number of reasons, not the least of which is to be respectful of participants’ time. Virtual meetings require facilitators to engage participants right from the beginning so they don’t “wander off” and do other things. Here are some things facilitators can do to help maintain meeting times:

- Open the meeting 5-10 minutes before its start time so others can join and test their video and audio (you may ask the meeting organizer to include a note in the meeting invitation suggesting participants join a few minutes early for this purpose). You can also copy and paste one of the following into a slide that is displayed for participants as they join:
  - Tips for using Microsoft Teams (PPT)
  - Tips for using Webex Meetings (PPT)
- Keep to the timeframe set by the agenda, unless participants agree to make a change.
- End the meeting on time (participants may have other commitments or priorities immediately following your meeting).

**Use Group Agreements**

Whether you call them group agreements, ground rules, guidelines, or norms, setting standards of behavior for meeting participants becomes even more important when you are meeting virtually. These should include agreements on decision-making—both who will make decisions and how they will be made.

If you already have these standards for the standing meetings you facilitate, review and adapt them, as needed, for a virtual setting. If you don’t have them already, create some. Remind participants at the outset of the meeting that these standards apply throughout the meeting.

[Click here for some sample agreements.](#)
Engage Participants
To keep participants engaged in a virtual meeting:

- Take time to acknowledge everyone in attendance.
- Provide a question in the chat for participants to engage with before the meeting begins.
- If participants introduce themselves, ensure they keep it short. Have a list of names posted in the chat in order of introduction so participants are ready when it’s their turn.
- Given the stress of the current situation, consider starting with a minute or so of meditation, intentional breathing, sharing, or reflecting on opportunities this situation is presenting, or positive ways people are coping.
- If participants are not using video, ask them to identify themselves before they speak.
- To eliminate background noise, ask participants to mute their audio when not speaking.

*Note:* If you are facilitating a large meeting, the meeting organizer can mute all participants and unmute them after they raise their hand. Here are instructions on how to mute all participants in Microsoft Teams and how to mute all participants in Webex.

Stick to the Agenda
The timekeeper and recorder become particularly important in helping a meeting stay on track:

- The timekeeper can provide reminders to help the meeting move along and keep participants accountable.
- The recorder can note other topics that come up and move these items to a parking lot.

You should only deviate from the agenda if everyone is in agreement.

End Strong
There are some things you can do at the end of the meeting to appropriately wrap things up and set the stage for the next/follow-up meeting:

- Summarize the agenda items covered and next steps, including actions to be taken and who is responsible for each.
- Review the parking lot and determine how to handle these items.
- If your meeting is regularly held, you can create the agenda for the next meeting, following up on next steps and other issues raised in the meeting.
- Ask for feedback on what worked and what could be better regarding the meeting process. Keep a running record of these responses and use them to continually improve your meetings.
- Be sure to thank everyone for their participation.

A great way to accomplish all of these items in one cohesive, inclusive, and engaging discussion is to use the Focused Conversation method.
Dealing with Technology Glitches
While virtual meeting technology has improved significantly, sometimes things go wrong. At this time, with so many people using the Internet for classes, meetings, and social connection, bandwidth can be challenged. Here are ways to address common technology glitches:

- If your connection becomes choppy, try having everyone turn off their video cameras.
- If you are dropped from the meeting or have a bad connection, try signing in again. If that doesn’t work, call in. Each invitation includes a phone number and PIN that will connect you to the meeting.
- Be sure everyone has access to materials and presentations. While you may intend to share your screen with these materials, if you have technical issues, the meeting can continue if everyone also has access.
- Be flexible and keep your sense of humor. Technical challenges are likely as people learn how to use the technology and large numbers of people tax the Internet infrastructure. Generosity and humor will help you pull off a successful meeting in spite of the challenges.

Meeting Follow-Up
To ensure that the progress and decisions made during the meeting are captured and can be built upon, there are a few key steps to take immediately following a meeting.

Deal with Documentation
Meeting notes and other documents from a meeting provide useful information on how and why decisions were made, as well as on the different options that may have been considered. Executive sponsors will likely be interested in this information, and having this documentation also helps ensure you don’t end up having to re-deliberate things simply because you don’t remember what was decided.

In addition to retaining meeting documentation for these reasons, you will also want to ensure you are complying with the university’s records retention requirements.

Follow Up on Action Items
Help ensure that those responsible for action items are working towards their completion:

- If no due date was assigned during the meeting, negotiate a reasonable date for the relevant deliverables. This date will help you determine when any follow-up agenda items can be scheduled.
- If an action item will result in proposals or other materials that need to be reviewed before a future meeting, ensure that those working on these items know when agendas and reading materials are sent out and schedule accordingly.