

Running an Effective Online Meeting

Stocktake tool

This short exercise will support your reflection on the indicators that contribute to effective online meetings. Some of the indicators are suited to more formal meetings, many indicators will be relevant for small team meetings.

Rate the meeting on a scale of 1 – (where 1 is “never/rarely” and 5 is “always”), and jot down any comments. Where the score is <3, you could focus your attention on strategies to increase the score.

Following the tool, you will find a list of useful resources and websites to support you

Technology setup for all members including the chair	1-5 scale	Comments
Location, technology and equipment are fit for purpose ahead of the meeting.		
Every participant has the technology and equipment required to access the meeting.		
Contingency plans are communicated so participants are aware of the process if technology fails or is interrupted.		
User guides are sent to all participants if a new form of online meeting tool is being used to ensure effective participation.		
Host and co-host administration is organised in advance, including clarifying the role of the co-host (eg. to monitor the chat for comments)		
The host is familiar (or has support) with necessary features of the technology that is being used including sharing screen capabilities, chat, meeting rooms and polling tools?		
The host profile has the appropriate settings to enable me to run the meeting effectively.		
Any polls are created prior to the meeting to ensure a seamless progression and poll settings are appropriate.		
Files to be shared during the meeting are ready to be uploaded using the chat facility.		

Organising the meeting	1-5 scale	Comments
The meeting group size is suited to the purpose of the meeting and members have the appropriate skillset.		
Meetings are usually held at times which are convenient for all participants.		
Meeting invitations are sent in advance to all participants and include the zoom link and agenda.		
Agendas make clear the purpose for every meeting (e.g. the task is understood – agenda items are differentiated for discussion/information/decision; there are time frames for discussion items where appropriate).		
If planned meetings are not necessary, they are cancelled.		
There is a logical process for making decisions, which everyone understands.		
Members make appropriate contributions based on understanding where the “meeting” is located within the organisation e.g. governance, management and extent of delegated authority (if any)		
The meeting is led effectively to ensure participants are provided with an opportunity to talk or contribute. If required, the host invites participants to contribute.		
Once made, decision/agreements are upheld by all members.		
Action items are accurately recorded with the name of the person responsible and a timeframe.		
Minutes are clear and concise.		
Running the online meeting	1-5 scale	Comments
Technology is tested by the host before the meeting starts. This includes any slides, annotation boards and audio to enable any issues to be resolved.		
If a waiting room is being used, the welcome message is adapted for the meeting context.		

All participants share a common understanding of the ground rules for the meeting (e.g. expectations about video on/audio muted unless talking and how participants in shared office space will participate).		
The host is conscious of managing soft speaking/distracting noises by muting participants where necessary or asking them to lean towards their microphone		
All participants feel connected and engaged in the meeting. Tools such as introductions or quick updates are used effectively.		
Participants engage fully in the meeting. .		
If there is a topic for discussion, polling or survey tools are used to gauge individual rations or opinions.		
Breakout rooms are used effectively to facilitate discussion or collaborative problem solving.		
The chat facility is used to ask questions or highlight contributions.		

References and resources

University of Otago Zoom Support Pages <https://blogs.otago.ac.nz/zoom/>

Zoom online training session on Meetings https://livetraining.zoom.us/rec/play/6Zx8f-j7qDw3GNeQswSDAPj-W9S4J6qshiYfqfcNyk20WyiHNFChb7pHZuCIKrDVR76R1BxgtMF4txaS?continueMode=true&x_zm_rtaid=X3tylp12QzeB4e_cNCNtRQ.1589490267263.50b7410ec00bea46895932e52d358c3c&x_zm_rhtaid=186

Getting stated with Zoom on PC and Mac <https://www.otago.ac.nz/its/otago177601.pdf>

University of Otago Zoom Host Tips <https://blogs.otago.ac.nz/zoom/zoom-host-tips/>

Virtual Meetings: A best practice Guide:

<https://www.sae.org/binaries/content/assets/cm/content/standards/virtual-meetings-best-practice-guide.pdf>

Zoom meetings Training Resources Guide: <https://support.zoom.us/hc/en-us/articles/209743263-Meeting-and-Webinar-Best-Practices-and-Resources>

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

Non Profit Technology Conference: <https://www.nten.org/article/9-best-practices-engagement-virtual-meetings/>

Zoom have a series of 4 slides that can be used to explain different aspects of the meeting process such as chat facility. This can be found at <https://support.zoom.us/hc/en-us/articles/209743263-Meeting-and-Webinar-Best-Practices-and-Resources>