

Quick Tips for a Great VIRTUAL Staff or Team Meeting

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A Little Backstory ...

- Obsessed with a better use of time & productivity
- One of my biggest pet peeves ...
- Every type of company, every type of job ...
- However, there were exceptions



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Many of the Same Rules Apply ...



Formal meeting?



Preparation is key ...

Goal/Objective/Desired Outcome

Agenda

Courtesy Rules?

Right People (and Only the Right People)

Take it to Another Level ...

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Many of the Same Rules Apply ...



ADVANCE PREP?



DOCUMENTS/FILES



ADVANCE RESEARCH



WITH VIRTUAL –
GET OUT INVITES &
INSTRUCTIONS

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May want to do a practice session ...



Give people an initial test run



Let them play a bit...

Test log ins/connections
 Test audio/video
 Test document sharing
 Test chat and other features
 Troubleshoot if needed

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Option 1:
 Do You Even Need a Meeting
 (or Need to Attend the Meeting?)



Remember, most people would rather not attend a meeting -- they have work to do!



Need a tangible business reason for holding any and every meeting



Purpose needs to be clear



Expected outcomes should be anticipated



If they are clear and obvious -- just assign the work!

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"I just attended another meeting that could have been handled by an e-mail."

Sort of funny ...

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<p>➔ What about dress code???</p>		

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The Checklist

- What is the purpose of the meeting?
- Who will lead the meeting?
- Is there a defined, well-planned agenda?
- Is there a set start and **end** time?
- Have the right people been invited and confirmed?
- Do they all know why they are attending and what information or expertise they are expected to bring?
- Have they been given adequate time to prepare?
- Have you as meeting leader given yourself time to prepare your thoughts/plans for the meeting?

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The Three “D’s” of an Effective Meeting

- *Meetings simply are a place where work should be:*
 - Discussed
 - Decided
 - Distributed

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You Might Like This ...

Meeting Name, Date, Time

Agenda:	Discussion	Decision	Delegation	Due
Agenda #1				
Agenda #2				
Agenda #3				
Agenda #4				

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Step 3: Manage the Meeting

- Are the right people (and only the right people) in attendance?
- Have ground rules been set for attendees (late arrivers, "rabbit trailers", phone callers, typists, interrupters, side conversations, etc.)
 - Create a formal "Meeting Etiquette" document?
- Has an agenda manager/timekeeper been assigned?
- *An interesting fact about sticking to agendas*
- Run the meeting



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Virtual Courtesy



- Get log in instructions out early
- Log in 5-10 minutes prior to session
- Test audio when arrive – announce self
- Mute line when not speaking? (Very important when lots of people)
- Silence your phone (maybe put away?)
- Headphones/ear pods? (Noise cancel?)
- Eyes on the screen
- People can hear/see you typing!
- *My wife says "Faces really help. Makes more interactive, keeps your attention, helps share emotion."*



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Step 4: Ending the Meeting



Check that all agenda points have been properly covered



Query for consensus/resolution/understanding from attendees

Possible smaller group breakouts?
 Avoid e-mail "downloading" – not as efficient as formal or informal "huddles" or even phone conversations



Have attendees received assignments with deliverables and due dates at the end of each meeting?



Have specific notes from meeting been shared with attendees post-meeting?



Ask for meeting feedback

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A Reminder – Use this for Meeting Notes!

Meeting Name, Date, Time

Agenda:	Discussion	Decision	Delegation	Due
Agenda #1				
Agenda #2				
Agenda #3				
Agenda #4				

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The “One Minute Manager” Model

- Short, impromptu meetings often more productive than planned formal meetings**

- Usually happen due to arising opportunity / crisis / change
 - Get 2-4 active people together quickly
 - Jump on a Zoom or Teams call
 - Huddle on new information – 1-2 topics max
 - Adjust plans according to information
 - Make plan for quick follow up
 - Take ACTION!

- Reference: “The One Minute Manager” by Ken Blanchard & Spencer Johnson

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What about
a brainstorm?

► **Virtual Meetings can be an excellent tool for a quick brainstorm session**

- Quickly get several diverse people on call
- Remember RULE #1 of a brainstorm!
- Have an assigned note taker (Mind Map?)
- Whiteboard option in Zoom or just a shared Word/Google doc or PowerPoint file on screen might work great!
- GO!

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Thank you for your time!

To find out more about
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