

Helpful Tips for Virtual Meetings

Virtual meetings create the opportunity to establish bonding and rapport with your clients during this extraordinary time. Through patience, careful planning and by applying these tips, you can deliver a productive virtual meeting.

GETTING STARTED

Choose an online meeting platform

- GoTo Meeting is the SEH standard virtual meeting platform. Be familiar with other options as your client may have a preference. Research options such as conference phone lines, Zoom, Adobe Connect and WebEx.

Get to know your virtual platform

- Make sure you feel secure that you know how to navigate the platform.
- Practice with a colleague, family member or friend.

Test your set-up

- Preview your webcam. Raise your webcam to eye-level.
- Be sure to test your laptop microphone, making sure it's activated and working correctly.
- Check your internet connection speed.

Eliminate distractions

- Move away from sources of noise such as TV, radio, roommates or family members. Communicate with those around you that you will be on a call.

Use a headset

- Headsets with a microphone will give you the best audio quality.

Software

- Confirm all attendees have the technology needed before the meeting.
- Test the connection and your comfort level with client platforms ahead of time.

Prepare attendees ahead of a meeting

- Send a meeting agenda 24-hours in advance. Include key talking points, meeting structure (i.e., when and how long to discuss each talking point), identify all participants, what each team member is responsible for bringing to the meeting, relevant documents, files, etc.
- Set rules and expectations of how the team should contribute.
- Provide attendees with a document that includes this information as a resource for participants.

DELIVERY

Arrival

- Dress the part.
- Log in early to help ensure no one is waiting for you to start the call.
- Turn off notifications to prevent distracting pop-ups. Set your instant messaging to Do Not Disturb.
- Greet attendees and identify yourself – let attendees know they have arrived at the correct meeting.
- Set rules – i.e., identify yourself before presenting, put phones on mute when not speaking, etc.

Vocals

- Speak more slowly and with more pauses than you usually would.
- Vary the pitch, speed and volume of your voice.



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- Smile. Participants can hear it, and if using a webcam, they can see it.
- Be patient, give time, allow for pauses – if meeting with several people, build in time for participants to think, unmute and share.

Authentic engagement

- Treat people as if they are present in the same room as you.
- Focus on having a conversation, instead of presenting; talk with, not at.
- Use the camera as often as possible.
- Ask a question or ask for feedback every four minutes or less.

Additional considerations

- Have your clients' faces be as large as possible on your screen so you can watch their facial expressions/body language (and they should do the same with you).

- Be an active listener with your body language rather than continually affirming verbally (don't talk over other participants with typical verbal responses such as "uh-huh" - it may seem like you're trying to talk over the speaker).
- Raise your hand when you would like to add to the conversation to avoid talking over other participants.
- Sit straight and be conscious of the angle of your laptop camera so that you are not "all chin."
- Center yourself in the frame, look into the camera and not at other monitors you may have running.
- Watch your participants for changes in ambient light (i.e., are they activating another monitor, checking their email, distracted in some way?)
- Be conscious of what's in the background of where you're sitting (if possible, have a simple, uncluttered wall/room behind you).