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Virtual Success: A Guide to Planning Online Meetings

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# Virtual Success: A guide to planning online meetings

This guide is developed to help business families adapt their meeting processes to an online format when required.

When it comes to board meetings and annual family assemblies, it's ideal for the group to meet in person. But when in person gatherings are not an option, keeping the meeting in a virtual format is the next best thing.

Do consider that virtual meetings have their advantages in saving time for both the participants and the organizers. Significant costs are also reduced on travel, accommodations, venue and catering.

Although it's especially a convenient option in times of global crises, these guidelines can also be applied to virtual meetings that are held deliberately out of convenience in the future.

Continue reading to identify the process and purposeful tools required to plan successful virtual meetings. You will also find out how other clients are staying connected (remotely) outside of business meetings.

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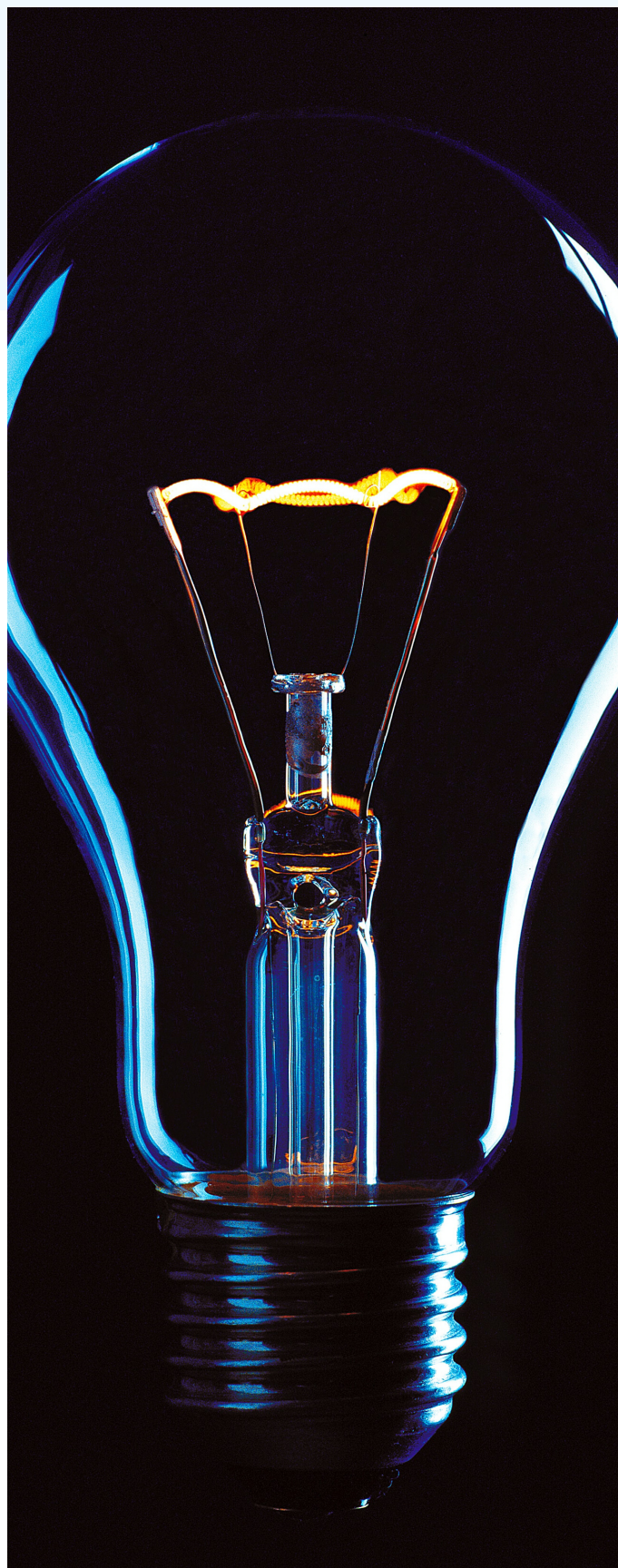
The Facilitator & Planner

Facilitator

Before the meeting:

- Manage the master presentation
- Work with the presenters on getting their slides and merging them into the master slide deck
- Allocate presentation times to the presenters

During the meeting:

- Host the meeting
- Navigate the presentation slides during the meeting

Planner

Before the meeting:

- Send out the meeting invitation to participants
- Liaise with speakers and coordinate speaking time
- Send separate invites to speakers if they are only participating during their own presentation
- Upload the meeting materials to the portal and send notifications to the participants

During the meeting:

- Record the meeting minutes
- Anticipate and resolve technical difficulties

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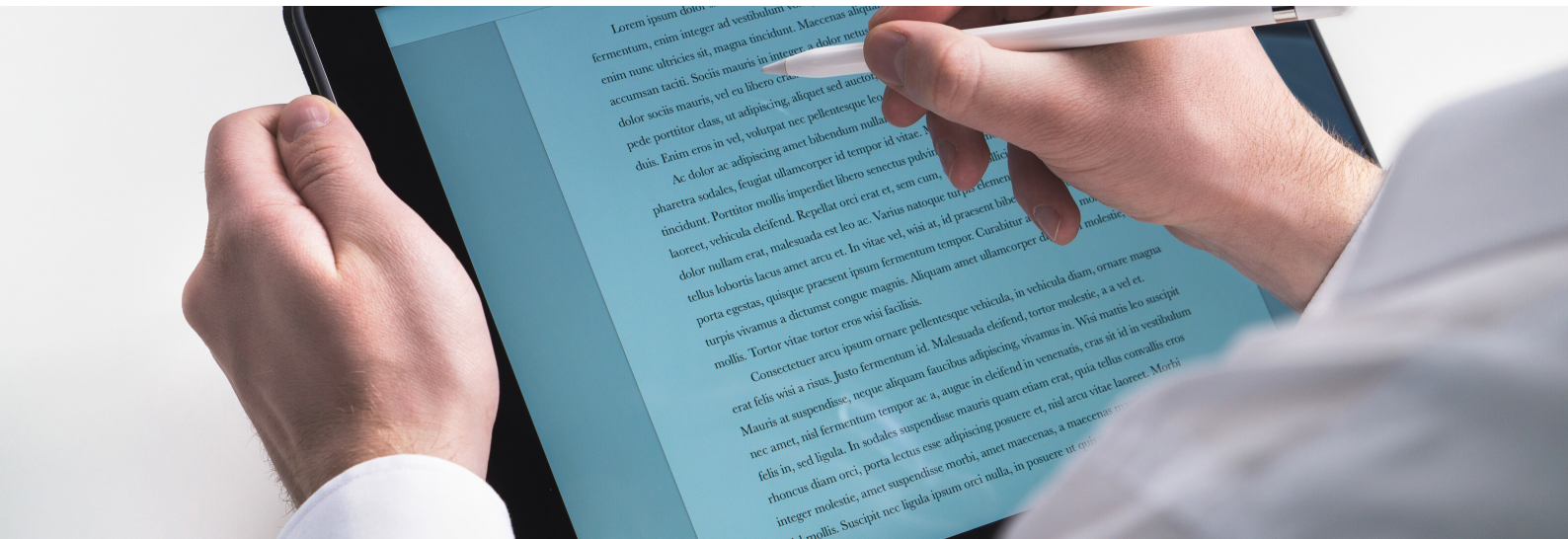
Shared Platform

If the meeting participants are not on your platform already, invite them so you can share relevant meeting materials, invitation and important updates.

Dedicated Group
Prior to inviting them, you may want to create or identify a dedicated **Group** for the participants to manage their access.

- Bring the Group to life and customize it by adding a banner to the Group page.

- Add a Note Widget to the Group and write a welcome message. Add a second Note widget and upload an image that's relevant to the Group. Link the image to a document or website.

Dedicated App
You may also want to request to have a new App created, so you can have a place to store the meeting's documents. Your CSM can create the App for you.

- Once you have your new App, you can hide some of the other Apps from the menu (for this Group). Consider this step if they're not going to have access to any folders within the other Apps. It provides a more orderly and deliberate experience for these members.

Platform Invitations
Once you have the desired setup for the Group, start inviting the members to the platform.

- Customize the Invitation email to explain your purposes for the invite and the Welcome email to provide direction on next steps.

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Document Management

Once you have identified an App for the meetings start building a folder structure for the meeting.

📁 **2020 Board Meetings**

Wayne Corp. Board Meetings

📁 **April 2020 Board Meeting**

📁 **Preliminary Agenda - WC BOD Meeting 04-23-2020**

📁 **Board Package - WC BOD Meeting 04-23-2020**

📁 **Meeting Minutes - WC BOD Meeting 04-23-2020**

Board meetings
Share the Board Package with the Group well in advance of the meeting to allow participants sufficient time to review the material.

Preparing the agenda:
Generally, virtual meetings work better with a simplified agenda. It is easier to follow a phone conversation if it focuses on a limited number of issues. Virtual meetings, therefore, tend to be shorter than traditional boardroom meetings. However, board members are still expected to come to meetings prepared, on time and to follow up.

Private Annotations
Make sure to tell the Board about Private Annotations, they can mark their notes directly on the document before, during, and after the meeting. Their notes will be saved on the document when they return to it and are completely private to them.

- Feature your meeting materials so the Group can conveniently access them through a top widget in the Group page
- Disable the download of a file when required

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Calendar Invitation

Survey

If you're still at the stage of determining a date for the meeting, create a Survey and provide a number of possible dates to the Group, analyze the answers and set the date based on the option that works for everyone.

Events

Once you have a date, create an Event for the meeting.

- Choose **one time zone** for the meeting and indicate it in the details of the event invitation (since it's a remote meeting, participants are likely joining from different time zones)
- Include the video conference details and provide instructions on how attendees can connect on the day of the meeting
- Clarify the purpose of your meeting
- Outline the format and logistics of the virtual meeting (don't assume everyone will be on the same page about the process)
- Advise participants to be online a few minutes before the meeting is scheduled to start (this will reduce interruptions as the meeting starts)

Video Conferencing

There are countless video conferencing platforms out there, when deciding which is the right one for you, consider the features that you will find helpful for your purposes. Here are some features that will help for Board meetings and Family Assemblies.

	Features
Must Have	Screen sharing
Nice to have	Screen recording
Nice to have	Waiting room (if some participants are only joining for a part of the meeting)
Nice to have	Hand raising
Nice to have	Polling
Nice to have	Instant messaging
Fun to have	Instant reactions
Fun to have	Virtual backgrounds

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Security

Recent events have funnelled fresh users to video conferencing and hackers have wasted no time in taking advantage of these new and untrained users. The good news is, falling victim to a video conferencing attack can be avoided with some best practices.

- Don't use consumer-grade software for business meetings, enterprise grade products offer more advanced administrative settings and security options.
- Explore the security setting options in your chosen product and only enable the features that are absolutely necessary for your meeting.
- Update your software as soon as a new version becomes available. Make sure all participants are running the latest version as well. Updates are packed with important security upgrades and vulnerability fixes.
- If available, use the waiting room feature, this allows you to deliberately let participants into the meeting.
- Enable a password for your meeting, use a combination of numbers, letters and symbols.
- Once all participants have joined, lock the meeting to new participants.
- Only record the meeting when absolutely necessary, make sure your participants are aware they are being recorded. Save the recording in a secure location and give it a unique name so you can easily find it.

Secure video conference alternatives to Zoom:

BlueJeans, Cisco Webex, GoToMeeting, Jitsi, Lifesize, TeamViewer, Whereby

Facilitator
- Verify that everyone is able to hear and/or see properly before the meeting starts
- Mute the other participants once a presentation begins and unmute for Q&A's
- Watch the time to make sure you're on track
- Do bring the discussion back to the main topic if conversation digresses

Participant Etiquette
- Call in from a quiet location
- Announce your presence when you join the call
- Put yourself on mute when not speaking
- Start a comment by saying your name if there is no video contact (not everyone may recognize your voice and this also helps the person who is taking minutes)

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Host a Virtual Social Hour

When the family meets for annual assemblies, there are social activities that are sprinkled into the event outside of the presentations. It's hard to replicate that when you're holding those presentations online, otherwise that would make for a very long day! Opt for a recurring social hour that takes place the same time every month.

- Explain the purpose of the gathering in your calendar invite (if you want to start with an icebreaker, include it here so everyone comes prepared)
- Have an agenda for the meeting: include updates & announcements
- Share a podcast or article ahead of time and discuss it during the gathering
- Have participants sit in a part of their home that has meaning for them
- Invite people to bring a beverage in their favourite time-zone appropriate vessel
- Start with an opening ritual and allow 1-3 minutes/person for their turn:
  - Ice breaker questions
    - What were words you couldn't pronounce as a child, so you made up your own
    - Have you ever gotten super lost? What happened?
- Have a host who will start the meeting with announcements and direct the icebreaker portion (they can also mute everyone else and give the floor to the speaker)
- Take a screenshot of the gathering and send it to everyone at the end

Download fun & free virtual backgrounds:
Canva, Shutterstock

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Kick Off an Appreciation Campaign

Start an appreciation campaign by asking your family to share their gratitude to your employees! Use this template to get started:

We'd like to ask each of you to show your gratitude for our folks – today and always – by posting to our Trusted Family site in the weeks to come. All of our amazing employees are working hard to keep the company moving, so let's help fuel them with our collective thanks and encouragement!

Need some ideas?

- *Have your kids make a piece of art work and snap a photo of it to share*
- *Write a few words of encouragement or thanks*
- *Take a photo of you or your family enjoying [insert company product/service]*
- *Share a story or memory about your time at [insert company]*

We'll be collecting photos and posts through [inset deadline] and will plan to share with our employees the following week. You can upload your notes or photos straight to the Trusted Family site, or email [insert contact]

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