

## From Blah to Bling: Tips & Tricks for Leading an Engaging Virtual Meeting

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### Intro

- We spend an average 4.5 hours per week in meetings
- What do people dislike most about meetings? Informal survey results:
  - No agenda, poorly planned, had zero value, go off topic, take too long
  - Participants agreed!
- Why have meetings?
  - To keep people informed
  - To discuss options about what to do
  - Decide on a way forward
  - Meetings are essential, but why not make them better?
  - Facilitation skills are key!
- Every good meeting has three sections: Before, During, and After. They all have value.

### Section 1: BEFORE

The Before section is where you do all the prep work before putting out a meeting invite.

There are important questions to ask and things to go over as you plan:

- **Could this be an email?** Ask yourself if this meeting is necessary or can be
- **Key people:** Who needs to be there? Make sure they can attend. If they can't, you'll just be repeating the meeting.
- **Agreeable date/time:** Mondays and Fridays are the worst days for meetings.
- **Objective:** Make sure you have a reason for your meeting. What do you want to accomplish? A decision made? A Discussion to be had? News to share?
- **Agenda:** Without one, meetings will go longer and people will be dissatisfied with the meeting outcome
- **Ask for agenda items:** This means the meeting will be of interest to your attendees. Then follow up and ask that person to speak on that topic so you have a variety of speakers, leading to more engagement.
- **Ease In:** Don't put most important items at the beginning. Do an icebreaker or follow up on last meeting. Something fun or light. But don't put the most important stuff at the end either, because then people are checked out and ready to go.
- **Timed agenda items:** Include times for each agenda item. This keeps you on track and participants know what to expect.
- **Set a start and end time:** End times are important so people know what to expect.
- **Platform:** The best platform to use (Zoom, Blue Jeans, Teams, etc.) depends on what you're looking for or what you (and participants) have access to. Be mindful of what people may be familiar with.

- **Connection Info:** Include phone number, along with the link so people without Internet connection or in the car can participate too.
- **Calendar Invite:** Handy for participants!
- **Send agenda 24 hours in advance**
- **Check your tech:** Ask a colleague to test it with you, especially if you have audio or video clips.

## DURING

- **Arrive early:** As host, arrive 15 minutes early. Get your links set up, test your sound, make sure everything looks right. Then you can welcome people.
- **Headset/microphone:** Better sound quality with an external mic.
- **Lighting:** Make sure you position yourself near natural lights or use multiple lights.
- **Clutter free:** Minimize clutter behind you.
- **Minimize distractions:** take off watch, put away phone
- **Positive attitude and energy**
- **Water:** Drink lots of water and don't be afraid to take water breaks
- **Assign Roles:** You're a better facilitator if you don't have to focus on multiple roles. As people join the meeting, ask participants directly to be a moderator, notetaker, or monitor chat. Delegating roles helps people stay engaged.
- **Be welcoming:** Do an opening question (like "where is everyone from?"). This gets people comfortable.
- **Rename yourself:** Put your name on your name label, along with your organization name. Ask participants to do the same.
- **Cameras on:** Ask participants to put on their cameras if possible. It helps with connections and building community.
- **Reactions:** Use the reactions available in Zoom, like the thumbs up. It's a way to engage participants.
- **Meeting norms:** State the rules and expectations at the beginning of the meeting so people know what to expect
- **Start on time**
- **Stick to the agenda**
- **Ice Breaker:** This can be a simple question and doesn't have to be work related. (What are people reading? What did you do this weekend?)
- **Topic voting:** If you have multiple topic choices, you can use the polls (which you can create before or during a meeting) to let people vote on what they want to talk about or what they want to start with.
- **Try tools:** Try one new thing each time you do a meeting, like reactions, polls, asking people to chat in, taking them to a new link to fill something out or doing a word cloud. By doing this, you can be modeling for others by showing them things they can use.
- **Resource flood:** Use the chat function to gather helpful information for all. For example, ask people to put an answer in chat: "Where do you buy all of your DVDs?" Maximizes time and it's a way to learn something new and share/build connections.
- **Build in breaks (and honor them):** Anything longer than 90 minutes needs a break. Even if it's just 5 minutes.

- **Pause:** When you're a facilitator and asking a question, make sure you pause. Let people digest the info, have time to unmute themselves, read social cues so they know if they can talk. Watch people's screen if they unmute themselves, then call on them.
- **Read the room:** Are people engaged? Are they multitasking? Get them to type or chat things in.
- **Monitor chat**
- **Ask good questions:** Not just yes/no questions. Good questions will lead to further discussion.
- **Call on people:** This can be a little uncomfortable, but if people are engaged with reactions and chat but are not quite talking yet, you can try drawing them out. For example: "Brittany, it looks like you have some great ideas in the chat. Do you mind coming off mute and telling us more?" Give them the option to pass if they're not comfortable.
- **Stay on topic:** Remember your objective and bring it back around if needed.
- **Synthesize:** Make sure everyone is on the same page and understands next steps.
- **Variety:** Do different engagement things.
- **Mini review:** Make sure everyone heard the same thing and they understand what happened at the meeting.
- **Action steps:** Point them out and state who is doing what and when.
- **Set next meeting, if needed:** If the group is small enough, you can all pull out your calendars. Or send out Doodle poll right after the meeting.
- **Closing**
- **End on Time**

## AFTER

- **Evaluate:** Self-reflection. What did you try and how did it go? What do you want to try next? How did you feel after the meeting? This is how you'll learn and grow as a facilitator.
- **Send out notes** in 1-2 days

## Recap

### Contact Info

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[Link to slides](#)