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The Complete 8-Step Guide To Conducting An Effective Virtual Meeting In 2021 [With Checklist]

By Ashley Bell

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Virtual meetings sound sort of futuristic...

Does “virtual” mean we all gather via hologram like they do in science fiction movies?

Do we put on headsets to enter virtual offices that have slightly better furniture and views than our [real offices](#)?

As more and more people start [working from home](#), many of us are asking:

What is a virtual meeting?

A virtual meeting is an [event](#) that brings people together via the internet or a digital network, usually to achieve a shared objective. A well organized virtual meeting allows people to collaborate and share information in real-time without the need of being in the same physical location.

Monica Linares from our [State of the Executive Assistant Facebook group](#) explains further:



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That's right! Planning is the secret to getting the most value from your virtual meetings.

Want to hear another secret?

Planning doesn't have to be hard because we've outlined all the steps for you.

To make your virtual meetings as effective as possible, see the detailed steps below and download our actionable checklist.

View Our 8-Step Virtual Meeting Checklist



Table of Contents



Your Virtual Meeting Checklist

Step 1: Nail down the details

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People Also Ask These Question About Virtual Meetings




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Your goal may be “soft” (getting some quality facetime with co-workers) or it may be “hard” (reaching a consensus on the modified annual sales strategy), but either way, **a virtual meeting game plan will help you do what you need to do.**

Virtual meetings come along with a specialized handful of barriers—technological challenges, low engagement, and disjointed meeting flows—that could get between you and your objective.

Talking to [Inc.](#), expert trainer [Lee E. Miller](#) summed up the problem perfectly:

“The biggest mistake people make is assuming that influencing when you are meeting face to face is the same as influencing when you are interacting virtually. It’s not. The rules are different because people respond differently when they are interacting virtually.”



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Plants are my coworkers

Step 1: Nail down the details

Do this: 1-2 weeks before your virtual meeting



Why:



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3. Lack of conversational flow (In the absence of physical cues, people te.

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How-to:

- Envision exactly how your meeting will run from start to finish by considering the factors outlined below.
- Document your flow for reference during future planning steps.

Technology and equipment:

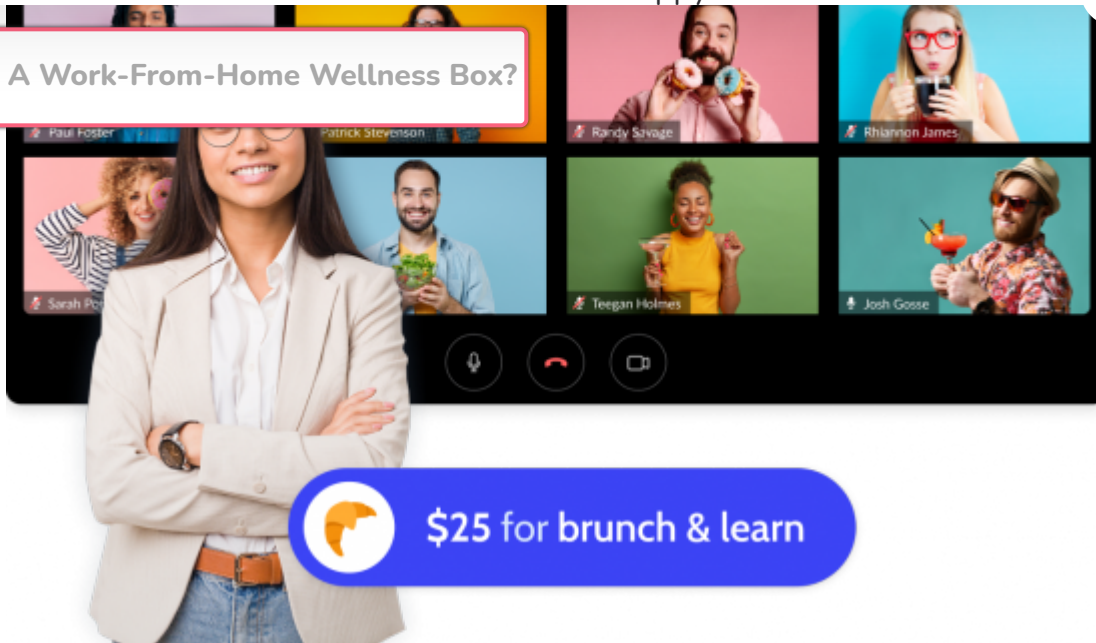
- Identify your [virtual meeting tools and tech](#).
- Learn how these virtual meeting tools work.
- Share basic tool instructions with attendees.
- Consider what your tool's capabilities allow you to do:
 1. Mute/unmute participants
 2. Turn off participants' video
 3. Dismiss participants if necessary
 4. Set a background
 5. If you need to use other software platforms during the virtual meeting, considering using a collaboration platform like [Toasty](#).
 6. Choose a neutral/professional setting where you can host the meeting with minimal interruption
 7. Test your meeting tool on your computer

Pro-Tip: Make virtual feel more in person with [Hoppier](#).




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Drive virtual attendance and get everyone excited with unique experiences that go beyond virtual. *Hoppier virtual spending cards* enable your participants to order breakfast, drinks, lunch from their favorite restaurants in minutes.

To experience the platform, *simply book a call* with their team and get creative ideas on how to throw a memorable virtual meeting!

Engagement:

- Create an attendee checklist to mark as people speak. Call on people who haven't yet had a turn.
- Plan to take roll at the beginning of the meeting so everyone can say "hello."
- Pick a [quick icebreaker question](#) for the beginning of the meeting.


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3. How long the meeting will take

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Pro-Tip: Adding the meeting agenda directly into the calendar invite is a good way to give attendees a quick heads up as to what the meeting will be about and also acts as a handy point of reference in case they need a reminder.

Add guests

[See guest availability](#)

[Suggested times](#)



richard.fendler@snacknation.com

Organizer



Tyler Simpson

Add Google Meet video conferencing

Add rooms or location

B

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✂

- Go over weekly objectives (progress/roadblocks)
- Review content plan for May
- Review social media content calendar for May
- Finalize end of April deck to send to Andy
- Grab final report of content revamps completed in April



- Set attendee expectations.
 1. Will you invite attendees to leave after certain portions of the meeting? (This could keep engagement up)
 2. Will you ask attendees to take turns speaking?

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- Commit to waiting only about 3 minutes before starting your meeting.

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avoid getting derailed as latecomers trickle

- Ask someone to moderate emails from attendees who can't connect.
 - *As the host, you won't be able to lead an engaging meeting while also providing IT support.*
- Ask someone (perhaps your email moderator) to help mute participants that have been making distracting background noises for 3 minutes or more. (Asking these people to self mute will only further disrupt the meeting)
- Ask someone to be your co-host. As you're focusing on covering key points, this person can monitor engagement.
- Commit to an "identify and eliminate" problem-solving strategy for unforeseen challenges.
 1. Limited meeting times leave no wiggle room for time-consuming troubleshooting.
 2. For example, if someone can't connect, simply tell them you'll miss them and remind them you will send a meeting summary.



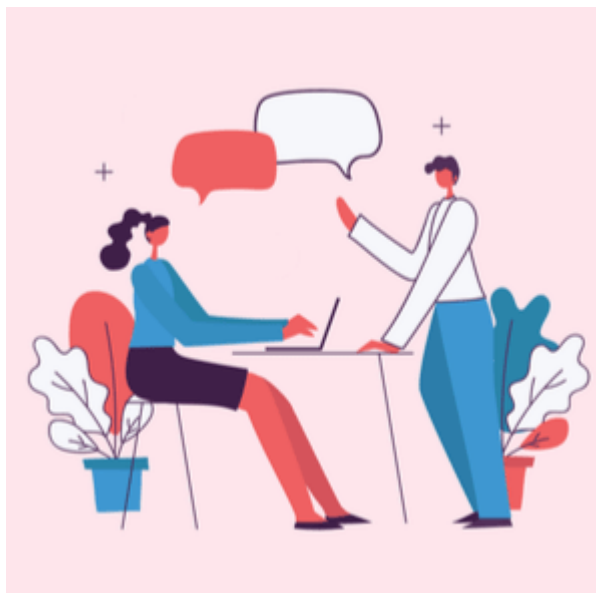


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Step 2: Send virtual meeting invitations

Do this: 1-2 weeks before your virtual meeting.



Why:

- So attendees can prepare and get excited. (It will also help your planning process. have a head count!)

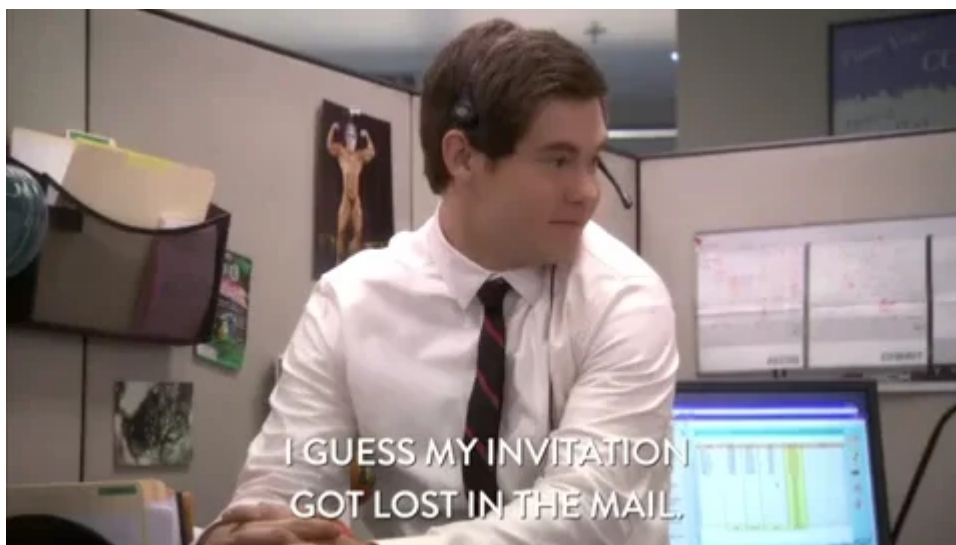
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- Technological format.

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...instructions you developed in Step 1.

- If you haven't developed instructions, then provide links to the [tool's main website](#) or user guide.
- Attendee expectations. (Especially if you've decided to implement speaker turns)
- Meeting itinerary.
- Meeting objectives.



Step 3: Send virtual meeting reminders

Do this: 24 hours before your virtual meeting



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Why:

- This helps boost awareness and reminds attendees to prepare.

What to include:

- A request for everyone to test the meeting technology.
- The details outlined in the original meeting invitation.

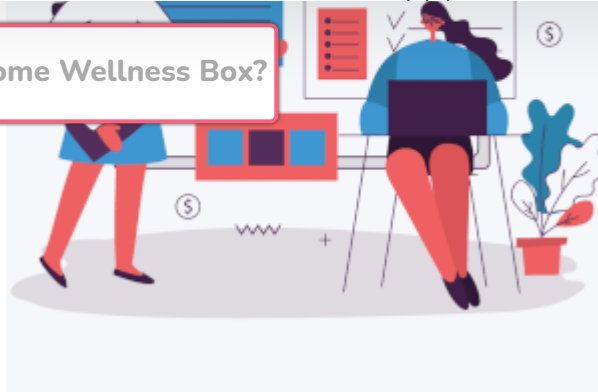
Step 4: Conduct pre-meeting checks

Do this: 15 minutes before your virtual meeting.



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Why:

- This is just like setting up a physical meeting room before attendees arrive. You want to be ready to get started as soon as your earliest attendee arrives.

How-to:

- Sign in to your meeting with your fellow hosts and moderators.
- Check your microphone and speakers.
- Verify your meeting settings, including any attendee settings (muting/camera off) you want to have in place.
- Launch a waiting room if your technology allows. (If anyone does happen to sign in a few minutes early, it won't be a problem)
- Review your meeting flow and itinerary one last time.

Step 5: Kick off your virtual meeting in style

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Why:

- [Starting your meeting](#) in an engaging way will set a productive tone.

How-to:

- Do a roll call to give everyone a chance to smile and greet one another.
- Deliver the icebreaker you selected in Step 1.

Additional Ideas:

- Play some music
- Play some trivia
- Host a [virtual team building activity](#)
- Take a poll or quiz
- Play a [longer icebreaker game](#) to get people really pumped
- Have a virtual dance party

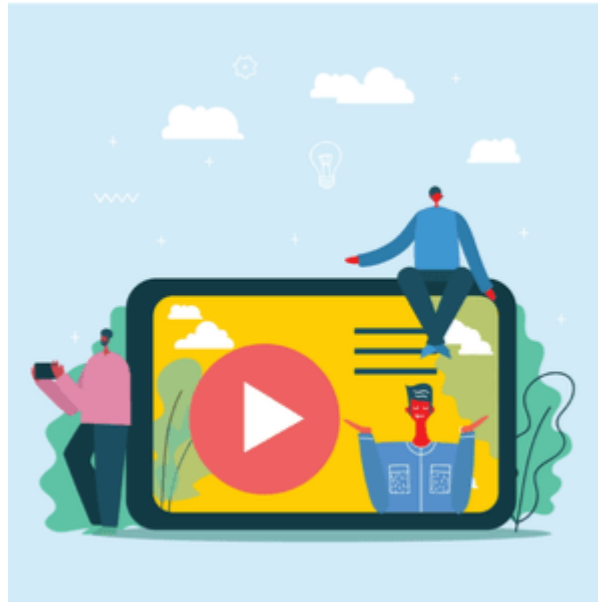


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virtual meeting host ever

Do this: During your virtual meeting.



Why:

- Hosting truly makes or breaks virtual meetings. The host sets the pacing and the tone and can influence the level of engagement, keeping people talking instead of looking at their phones.

How-to:

- Stick to your meeting flow and itinerary. Why? This makes your meeting feel organized and purposeful.

Use these strategies/techniques to make your attendees as comfortable as possible:

- Smile.

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- Focus only on the meeting for its entire duration.
- Speak clearly and into your microphone.
- Extend pauses after everything you say to give people plenty of time to weigh in.
- Make “eye contact” by looking into your camera.
- Frequently ask if anyone has any questions or additional thoughts. (Virtual meetings can sometimes feel like television shows or presentations. Questions and prompts remind people that they are active participants and not passive consumers.)
- Take a group selfie (just a picture of your screen) every 15 minutes to cultivate attention and eye contact.
- Speak with your hands to encourage attendees to look at you and make eye contact.
- Avoid looking at yourself. (Hide your view if you must)
- Acknowledge speaker contributions with a silent nod. (Verbal comments will slow the meeting down, but a physical confirmation lets attendees know they’ve been heard.)
- Call on attendees who haven’t had a chance to say anything.
- If your meeting is long, take breaks.
- Use additional icebreakers or [icebreaker jokes](#) to engage attendees who stay at their desks.

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Step 7: Don't just end your virtual meeting—close it

Do this: Before you sign off of your virtual meeting.



Why:

- Virtual formats enable us to leave meetings with one easy click of a button. Avoid the urge to press that button and bounce. Close your meeting with purpose and control.

How-to:

- Ask if anyone has any other thoughts to add.
- Summarize key points.
- Summarize next steps and clarify responsible parties.

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Step 8: Follow up immediately

Do this: After your virtual meeting concludes



Why:

- Following up immediately helps you **continue engagement** while attendees have your meeting fresh in their minds. ^

What to include in a follow-up email:



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any luck, this will match your key meeting

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- Recording. (if applicable)
- Satisfaction survey link or simply a request to email you directly with feedback. (Was this meeting useful? Why or why not?)

Additional follow-up steps:

- Reach out to anyone who had trouble connecting to the event from their [home office](#).
- They'll of course be included in your main follow-up email, but an extra apology is a nice touch.

[View Our 8-Step Virtual Meeting Checklist](#)

People Also Ask These Question About Virtual Meetings

Q: What are the advantages of virtual meetings?

- A: The advantages of virtual meetings include connecting us when we can't be together and helping us transcend spatial barriers to maintain work relationships, business continuity, and productive collaborations. [Use this planning checklist to enjoy all the advantages of virtual meetings.](#)

Q: How long should a virtual meeting last?

- A: Virtual meetings should last for no more than an hour. Break your meeting into 15-minute segments and take breaks to keep attendees energized. Be prepared to

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by carefully planning every aspect of your meeting and using hosting techniques that make people comfortable and identifying engagement strategies that encourage participation.

Q: How do I know if my virtual meeting was effective?

- A: Know if your virtual meeting was effective by asking for feedback in your meeting follow-up email. You can also take steps to make your meeting as effective as possible in the planning process.

Q: What is the first step to conducting an effective virtual meeting?

- A: The first step to conducting an effective virtual meeting is nailing down all the details. [You can find all 8 steps here.](#)

Q: Why do virtual meetings work in 2021?

- A: Virtual meetings work in 2021 because our need to meet remotely is greater than ever, our meeting technology is better than ever, and our knowledge of what makes virtual meetings successful is growing every day.

Q: What do I need to start a virtual meeting?

- A: To start a virtual meeting, you need a presentable work space, a laptop or desktop computer, a reliable internet connection, virtual meeting software, meeting attendees, and a good icebreaker question to kick things off. Find other steps for planning virtual meetings.

Q: Are there ways to improve remote employee engagement in my virtual meeting?

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How to host a virtual meeting?

Virtual meetings are a great way to digitally bring people together to discuss important issues, achieve critical goals, or build and maintain healthy office relationships.

Q: How should I start my virtual meeting?

- A: You should start your virtual meeting by taking roll and presenting a short icebreaker question. Find out how to plan, host, and end your virtual meeting.

Q: How should I end my virtual meeting?

- A: End your virtual meeting by gathering final thoughts and summarizing key points and next steps. You should also plan to send a follow-up email immediately after the meeting. Find more start-to-finish virtual meeting planning tips.

Is there anything we missed? Please let us know in the comments!

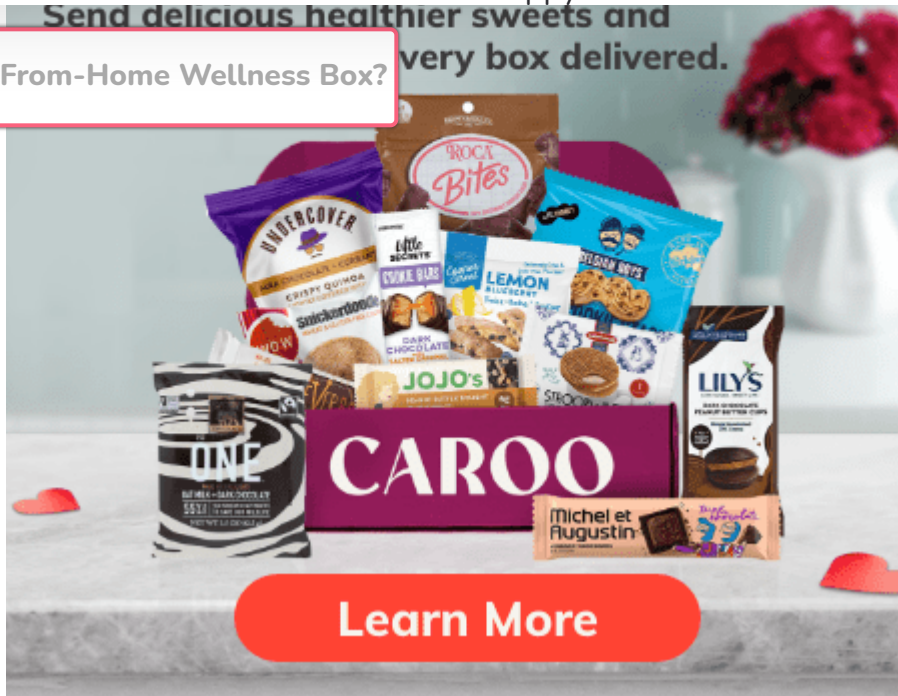
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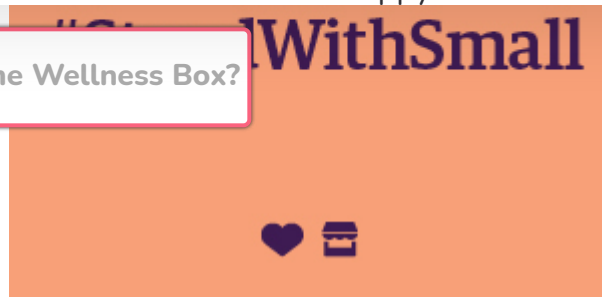
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SnackNation is a healthy office snack delivery service that makes healthy snacking fun, life more productive, and workplaces awesome. We provide a monthly, curated selection of healthy snacks from the hottest, most innovative natural food brands in the industry, giving our members a hassle-free experience and delivering joy to their offices.





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Disclosure: We may be compensated for company collaborations in this article, but the opinions expressed are our own



SnackNation is a welcome addition to our office. We love the variety and convenience... and not to mention, having healthy options around for a change. Win-Win-Win!

- Nora D. of Smith Brothers Agency

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Emily

May 7, 2020 at 1:21 pm

Thanks for including so many tips on keeping engagement up. Definitely going to need a variety of these tools going forward!

↳ Reply

Richard Fendler

May 7, 2020 at 10:25 pm

Happy to hear that Emily! Do you have any additional tips?

↳ Reply

Robux Generator

May 9, 2020 at 7:13 pm

This really comes handy, especially in these rough times we have right now, thank you

↳ Reply

Leave a Reply





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