Facilitation Essentials:
Facilitating Virtual Meetings Checklist

This quick reference tool is intended for employees at all levels who are organizing or facilitating a virtual meeting
and are seeking tips on planning and preparing for virtual meetings, launching their session, as well as delivery and engagement.

There is more to facilitating than just showing up!

Planning

☐ **Define and share your meeting objectives**

Are you building community, making decisions, sharing updates? Make sure this is clear to you and your participants.

☐ **Select the platform/tools that will help you accomplish your objectives and engage your participants**

Consider accessibility, dial-in, Voice over Internet Protocol (VoIP), video, brainstorming and whiteboard software chat, breakout rooms, polling, recording and/or screen sharing. To limit distractions, use a maximum of one tool aside from the main platform.

☐ **Plan your agenda and content for the virtual space**

Build in time for teaching technology (as needed), participant interaction and breaks.

☐ **Helpful hint**

If you're organizing a larger or more formal meeting, consider enlisting a producer to manage the technical elements. For example, your producer can troubleshoot technical issues, monitor questions and repeat information in chat, so that you can focus on delivering the content.

Preparing

☐ **Ensure the virtual space is available and schedule your meeting**

Select recurring meetings if applicable.

☐ **Send your invitation, agenda, preparatory reading and technical instructions ahead of time**

This helps ensure everyone arrives prepared and ready to participate.

☐ **Learn your technology and be prepared to clearly explain and offer technical support to your participants**

For larger or more complex meetings, do a full dry run (with your producer) and practise your technology cues (for example, "locate your text tool in the top left of your screen.")

Launching

☐ **Prepare your physical environment ahead of time**

Remove distractions, grab a pen and paper and a glass of water, and get comfortable.

☐ **Log in to your meeting early**

Arrive early enough to load your presentation, test your audio/video connection, set attendee privileges (e.g. allow chat, annotation) and close any applications you won't need. This may vary from a few minutes earlier for smaller or more informal meetings to 15 minutes ahead of time for larger or more complex meetings.

☐ **Welcome your participants as they log in and test their connection**

Use their name to say hello or use chat. This helps ensure they feel connected and creates a more inclusive environment.

☐ **Helpful hint**

In your meeting invitation, encourage participants to log in a few minutes early to test their technology and ensure the meeting starts on time.

Delivery and engagement

☐ **For larger or more complex meetings, consider using a short icebreaker**

This helps participants warm up for participation.

☐ **If you want to make a video recording of your meeting, you must first get approval from all attendees**

Tell attendees why you're recording and where it will be stored. Alternatively, consider recording key points and decisions in writing using the chat function.

☐ **Review the agenda and establish the meeting ground rules**

For example, muting/unmuting, using chat, raising hand for questions.

☐ **Helpful hint**

For every 90 minutes of meeting time, offer a 10-15-minute break. While reviewing the agenda, tell participants when they can expect their break. This will help keep everyone focused until then.

☐ **Engage participants every three to five minutes**

For example, encourage people to comment using the chat function, or work through ideas or questions using brainstorming or whiteboard software.

☐ **Be patient with the technology and take a breath**

Give the technology a moment to catch up and give your participants a moment to reflect and respond. Get in the habit of repeating technical instructions

☐ **Keep your voice natural and human**

Modulate and be mindful of your pace and intended tone. If the topic is particularly important to you and you want to get a sense of how you sound, consider practising and recording yourself ahead of time.

☐ **Keep a pulse on engagement and energy levels**

Use and encourage active-listening techniques and call on participants to offer responses or summarize info. Adapt and/or offer a break if necessary

☐ **End on time**

Leave yourself enough time to thank your participants, answer final questions and recap future actions.