

Best practices for hosting a virtual meeting or retreat

Keep attendees engaged and encourage participation

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- 1 | Ask all attendees to use their own laptops/computers and share their cameras to encourage collaboration and discussion.** This enables everyone to participate in chat or polling as well. Include this in the invite and the prep email to the group so they are prepared.
- 2 | Schedule a dry run of the virtual platform with co-facilitators.** Practice muting, using chat, sharing slides, and how you will document responses to discussion on the screen. Ask a colleague to join for technical support, and make sure attendees have their contact information.
- 3 | Put the goal—and any ‘anti-goals’—of the meeting on a slide at the beginning of the discussion.** This way it is abundantly clear the purpose of the meeting, why it’s so important for participation, and also what is out of scope. Make sure to tie this goal to something that the attendees will care about, and highlights the downstream implications of this discussion.
- 4 | Set a schedule and stick to it. Explain to the group your role as a facilitator to advance the conversation to adhere the schedule and goals.** If you have a clearly set agenda with timestamps, it gives you permission as host to cut off a discussion, or invite someone to speak who has not yet participated. Set this context at the beginning to gain permission from the group to move the conversation along as needed.
- 5 | Use chat to allow attendees to submit questions or comments without interruption.** As it can be difficult to ‘raise your hand’ in a virtual sense as in a live meeting, the chat allows attendees to ask a question or comment in the moment that the host can address at a pause, or others can answer in the chat box, without having to interrupt the flow of the conversation. This also is helpful for the softer voices in the room to have a chance to speak—which can be a very positive aspect of virtual over in-person meetings.
- 6 | Include prompts before and during the meeting that require an answer to encourage participation.** A few ideas:
 - Send an email in advance asking all attendees to answer one question related to the topic of the discussion, and be prepared to share their answer during introductions. For example, if the meeting is going to address a new policy that is up for review, ask everyone to be prepared to share one aspect of the new standard they are excited about, one aspect they are concerned about, and one question they would like to address in the meeting.
 - Pose a question of the group on the slide, and ask everyone to submit their response in the chat function so you can address with the group.
 - Use the poll function in your virtual platform to create a quick poll or two to use at a few stages in the meeting that is related to the topic at hand. This requires all attendees to reengage and participate in the discussion.

7 | **Every 10-15 minutes, include an interactive element to break up the flow and re-engage attendees.** This could be a quick poll, a question in the chat, a video, asking one of the attendees to share a recent experience related to the topic of conversation (discussed in advance), etc.

8 | **Strategically time breaks—and include more than you would for an in-person session.** Avoid “Zoom fatigue” by placing breaks throughout the agenda. Include an action item immediately before the break, such as a quick poll or a discussion question that attendees will be asked to reply to when they return to help segue back into the conversation.

9 | **Have a virtual ‘parking lot’ to help avoid off-topic tangents.** To keep the conversation from going off track, if you hear a comment that is out of scope for the current agenda, or is going beyond the allotted time, recommend to place that idea or question in the ‘parking lot’ as important points to address later. This could be a blank slide in the slide deck, a separate Word document you pull up, or use the chat with a “Parking lot:” next to those comments. Be sure that you follow-up on these ideas or questions after with the group.

10 | **If you would like to engage the group in contributing ideas or solutions to a topic of discussion, consider a virtual brainstorming exercise:**

- Include the question or prompt on the slide
- Ask everyone to individually take two minutes to write every idea that comes to their mind in response to this question on a piece of paper
- When the two minutes are up, ask them to circle their top two ideas
- Report out: go around the virtual room and call on each attendee to share their two ideas
- As everyone reports out, have a colleague who is co-hosting type their answers in the moment on a Word document or PowerPoint slide that is shared on screen so everyone can see that their answers have been recorded
- Spend 10-15 minutes as a group discussing these responses
- If you would like to come to a consensus, ask everyone to vote on the ideas on the page, either in the chat function, or if more private, ask everyone to immediately email or text you their response (if you wait until after the session, attendees may forget)

11 | **Always leave 5-10 minutes for closing and next steps.** As opposed to an in-person meeting where you have time to talk in the hall after, you need to leave ample time to wrap up the conversation, take final questions, and agree on next steps.

- Consider including a slide at the end of the slide deck with “Next Steps” and blanks that need to be filled in aligned with the discussion you just had (e.g., task, owner, deadline). This demonstrates the need for the group to agree on action items and accountability.