

Protocol for Online Meetings

For Administrators:

- ___ 1. Make sure everyone knows about the presentation/meeting well in advance
- ___ 2. Send reminder one day before
- ___ 3. If attending is required, send second reminder just an hour before starting
- ___ 4. If you feel the need, conduct dry run with at least one presenter the day before
- ___ 5. Designate someone ahead of time to take notes and vet questions
- ___ 6. Call in 10-15 minutes early. Welcome participants as they arrive
- ___ 7. Introduce the meeting or presentation 2 minutes after scheduled start.
Set the ground rules at this time, including letting others know how questions will be handled (audio, breaks, comments, questions)
- ___ 8. If the conference is in the form of a meeting, make sure any follow-up is clearly assigned to the appropriate participants
- ___ 9. Send out recording, resource materials, etc. within 24 hours
- ___ 10. Jot down lessons learned, and consider hosting a live discussion or informal Q & A for the future

For Speakers/Presenters:

- ___ 1. When writing your presentation keep the audience in mind. Look for opportunities to engage them through questions, illustrations and real-life examples.
- ___ 2. If you're delivering a webinar, decide in advance whether you want to be visible to the participants.
- ___ 3. Conduct a dry run with your administrator the day before. You don't have to go through your whole presentation, but get familiar with the software and make sure it's working properly.
- ___ 4. Log or call in at least 10 minutes early. (Before joining, close out any personal applications on your computer.)
- ___ 5. Do not use pre-recorded video in online meetings because of internet connection issues, the video may be choppy and will not sync properly. It can be very frustrating for the viewer. If a pre-recorded video is part of your presentation, send the video to participants as a link before or after meeting.
- ___ 6. Do not read your slides: Best practice is big fonts and as few words as possible-- it's up to you to explain, elaborate, and engage.
- ___ 7. Show enthusiasm: Get to know your material well so that you can make it come alive.
- ___ 8. Most people speak too fast when presenting, so slow it down.
- ___ 9. Schedule pauses in your presentation to handle questions.
- ___ 10. Stick to a predetermined time for your core material. (Make sure there is plenty of time scheduled for questions, during and after.)
- ___ 11. Conclude with a sum-up and actionable advice; focus on key takeaways.
- ___ 12. Provide your contact information at conclusion.
- ___ 13. If you do not have an admin for your meeting, and participants have a password, then allow participants to join automatically.

For Participants/Attendees:

- ___ 1. Make sure you have access to the conferencing software. (May require download.)
- ___ 2. Call in a few minutes early.
- ___ 3. Make sure your phone or device is on “mute” and video is on.
- ___ 4. Don’t interrupt.
- ___ 5. Reach out to the speaker or moderator after the presentation if you’d like more insights.
- ___ 6. Do not multitask if your video is on, do not look at phone or email.
- ___ 7. Do not eat or drink during meeting.
- ___ 8. Check your framing and lighting before signing on.
- ___ 9. Keep your self muted unless asked to respond.
- ___ 10. Sit up straight, shoulders above hips. Do not lean back. If the meeting is long, use a pillow behind your back for support.
- ___ 11. Use body language such as smiling, nodding or thumbs up to engage.
- ___ 12. If possible work from a quiet, carpeted room and use an uncluttered, neutral background. Tidy up or move things out of the background if necessary.
- ___ 13. Create good lighting toward your face. No windows behind you unless they have curtains or blinds that close.
- ___ 14. Use laptop, or tablet, not a smartphone for video. If you must use a phone, place on a tripod.
- ___ 15. Raise your webcam to eye-level. No one should see your ceiling.
- ___ 16. Use a good microphone or headset.
- ___ 17. If your internet connection is weak, reboot the router *and* reboot the computer.