

Using a Virtual Meetings Platform - Basics

Step 1: Know Your Platform

- ✓ Take a tutorial. View a video. Read a Manual. Understand the basics of your platform.
- ✓ Learn the controls: mute and unmute; camera on and off; polling (if you plan to use); sharing screen; and other functionalities of your platform.
- ✓ Check your own camera: what do you want participants to see in your background?
- ✓ If you plan to share a video, be sure you know how to share video audio on your platform.

Step 2: Pre-Meeting

- ✓ Designate a meeting co-host. The co-host can admit attendees if you use a waiting room, monitor the chat box, help participants, keep the facilitator on time, and jump in if the chair runs into a technical issue. Be sure the co-host has the slide deck if you plan to use one.
- ✓ Prepare and use an outline or script to keep on track. Make sure your co-host and anyone else helping with the meeting has the outline/script.
- ✓ Decide who controls the mute button—you and/or your co-host or your attendees?
- ✓ Decide what technology the participants will use (hand raising? Polls? Thumbs up? Online voting?) and create a slide to explain how to use the technology. Consider changing up the method of voting throughout the meeting to keep members engaged.
- ✓ Brand everything with your logo and [PTA's Membership Campaign](#) graphics, including your virtual meeting backdrop.

Step 3: Practice

- ✓ Do a trial run with your co-host and others. Ask for feedback and use the feedback. Specifically, is the sound clear, does the lighting work, is the camera positioned properly, is the technical slide helpful, does the meeting flow and keep a quick pace and are you trying to do much?
- ✓ If you plan to record or use a feature such as polling during the real event, use the tools during the practice. Ensure you and your co-host are comfortable at the controls.

Step 4: Meeting Day

- ✓ Get ready at least 30 minutes before the meeting. Use the rest room, grab a drink, quiet the background noise, put the dog in another room. Position the camera and check your lighting.
- ✓ Sign into the meeting at least 20 minutes prior to your members. This is the same for your co-host and anyone presenting. Ensure technology, mic and audio work and everyone is ready.
- ✓ Finish all preliminary discussions and checks before your attendees arrive, put up the technical slide, and be ready to welcome early arrivals.
- ✓ For the facilitator: rev up the energy, be warm and welcoming as people arrive.
- ✓ Start on time. If you plan to record the session, announce that at the start of the session.
- ✓ Do not let a few bumps throw you. There will be bumps. Keep on smiling and keep on going.
- ✓ End the meeting on a high note: recap, tell member what will happen as a result of the meeting, thank everyone who attended, and invite non-member guests to join.
- ✓ Consider adding a short post-meeting networking session for those who want to stay and socialize. Pick a topic and ask people to share ideas. This will add a voluntary social aspect to your timed, well-paced business meeting.

Using a Virtual Meetings Platform – Beyond the Basics for Facilitators

Meeting Platform Features and Controls:

- Always use your camera. Be sure to remember the camera is always on, so watch facial expressions and smile a lot.
- Be thoughtful in positioning your camera. Will yours shoot from below, up your nose and chin first? Will you need to prop up your device so the camera shoots more than just the top of your head? Ideally, you should be centered in the shot with head and shoulders showing.
- Lighting is important. Experiment. Ideally, you should be lit from the front. Do not sit with your back to a light source or window. This will place you in shadow and you look like you are in the Witness Protection Program.
- For your background, use your PTA's logo or graphics from [PTA's Membership Campaign](#). If you do not use a virtual background, consider blurring your background if the platform allows. Be sure to avoid background distractions that can be read like posters, signs, and book titles.
- To headset or not to headset? If you use a laptop, use the built-in microphone unless you know there will be background noise. If you use a headset, find one that works for you, one that is not distracting or uncomfortable, and then practice with it. Learn to use its mute button and discover the best position for the microphone.

During the Meeting tips and suggestions:

- Up your energy! This may not feel natural at first. Remember, distractions are everywhere in a virtual setting, so the facilitator needs to be expressive, change tones, show excitement, and talk directly into the camera to keep your attendees engaged. Nod or acknowledge other speakers to show you are engaged. Practice. Record yourself, place yourself in your attendees' shoes, and listen to what attendees will hear.
- Eliminate distractions on your end. Be sure to disable pop-ups on your device. Silence your cell phone. Then find a place to keep it where the vibrations from the phone will not be heard on the device you are using for the meeting. Make sure other presenters do the same.
- Decide how to handle motions, discussions, and questions. How do you want members to seek recognition to speak? Do you want cross-discussion going on in the chat box? Tell participants what to expect and think about setting ground rules to avoid confusion.
- Keep the meeting moving. Stick to your agenda. Do not get side-tracked. Meeting facilitation is an art—practice and prepare. How will you stop a member who continues to speak beyond their allotted two minutes? What will you say if a member speaks out of turn or makes it personal?
- If your meeting runs long because members have extended debate, build in mental break-time. Ask people to stand in place and stretch or jump up and down. Play a song and ask members to dance in place. Or ask them to sing a song or recite the PTA mission. The idea is to take a mental break from the action without giving members permission to walk away from their device and your meeting.

