

CHECKLIST

TO RUN MORE EFFECTIVE VIRTUAL TEAM MEETINGS



RUNNING VIRTUAL TEAM MEETINGS HAS NEVER BEEN EASIER.

Meeting with your online team doesn't have to be challenging.
Get prepared, be effective, and have a little fun while you're at it!

GET STARTED



Checklist for Running More Effective Virtual Team Meetings

Managing a virtual team requires a different management style than managing a physical team. The 3 pillars of remote team management are structure, communication, and relationships. It's not that these issues aren't important when managing physical teams too, but that they're especially important within virtual teams.

The following checklist helps you establish a more effective virtual team meeting format from the time you create the event on your calendar to the final sign off at the end of the call.



BEFORE: Setting Up a Virtual Meeting

Ensure a successful virtual meeting by preparing ahead of time.

- ☐ Test the working conditions of your equipment.
- ☐ Make sure you are in a quiet location.
- ☐ Have a set of simple guidelines in place for all virtual meetings.
- ☐ Remind participants of these guidelines early in the session.
- ☐ Begin on time, stick to the agenda, and end on time.
- ☐ Have all participants say hello and introduce themselves.



DURING: Encouraging Participation in Virtual Meetings

Web conferences have amazing capabilities, but they're only as effective as how the manager uses them. With features like paired chat and polls, many web conference apps give managers the tools to connect with remote employees. It's up to managers how they choose to integrate them into their communications.

- ☐ Ask all participants for agenda items and distribute the agenda before the meeting.
- ☐ Make sure all technical tools are set up before the meeting.
When the conference begins, identify yourself (as host or facilitator) and briefly mention the names of everyone who is present and introduce anyone who is new.
- ☐ Pause at regular intervals; ask for others' views and/or questions.
- ☐ Refrain from behavior that could alienate participants, such as long monologues or extended conversations with people sitting next to you.
- ☐ Look into the camera when speaking, not at people sitting in the same room.
- ☐ Be aware of lag time, and don't jump to new points, which may confuse listeners.
- ☐ Make sure that main points are summarized and action items are clearly stated and then distributed to each participant.



AFTER: Establish and Maintain Work Relationships Among Virtual Team Members

It's harder to manufacture collaboration in a virtual environment. Without face-to-face contact, virtual team managers must get creative with how they introduce team members, foster a personal and professional connection between them, and encourage consistent participation.

Get to Know Each Other

- ☐ Kick off a conference call with a Welcome Party when new members join.
- ☐ Have team members share their pictures with a quote (or motto) that describes something about them before your meeting. Then provide a bit of time to socialize at the beginning of the call—just enough time to create a friendly atmosphere.
- ☐ Set up a “get to know everyone” virtual gathering and discuss business challenges.
- ☐ Establish a team website that gives your team an identity and includes members' photos, bios, and personal information.

Some companies are creating an internal social network across their organization (think of it as a proprietary Facebook). Use your internal network to share information, updates, and announcements via social media sites preferred by your team.



Build Rapport During Meetings

- ☐ Include time for social discourse so that members can make natural connections. For example, a team in the financial services industry conducts a timed five-minute “check-in” conversation at the start of calls and then individuals follow up by phoning each other between meetings.
- ☐ Assign “break buddies” who can chat with each other after the team call or during a break.
- ☐ Encourage perspective sharing. During team updates, ask attendees to state their perspective on an issue so that team members can better understand each other’s values and styles.
- ☐ Conduct a brainstorming call. Use a round-robin technique and solicit everyone’s input. Follow collaborative brainstorming guidelines that encourage “No judgment” and “Listening.”
- ☐ During larger meetings and with larger teams, use the whiteboard to write attendees’ locations or display a world map so that people can see each other’s name, location, and time of day.
- ☐ Rotate the schedule for conference calls so that the discomfort of participating at inconvenient times doesn’t fall on one party or one time zone.



Create Ongoing Social Interactions

- ☐ Get team members to talk about their family or pets, to share something of themselves.
- ☐ Treat everyone with respect and as a potential friend. Learn one thing about each team member's life outside of work—an interest or special hobby, for instance.
- ☐ Discover tricks to build rapport across the divide: Pay attention to holidays in different countries and send e-cards or short communications to wish your teammates "happy holidays" in their language.
- ☐ Reach out to teammates you haven't heard from and say, "We haven't talked; do you want to sync up or check in for ten minutes?" Usually they will be willing to meet you halfway.
- ☐ Learn your teammates' IM habits and send quick texts.



Add Some Fun

- ☐ Have a virtual team-building session where everyone plays video games with each other.
- ☐ Use flash cards for playing cards online.
- ☐ Give a virtual “pat on the back” by sending a recognition email to your teammate.
- ☐ Exchange favorite recipes during the holidays. Pick a holiday and explore its traditions (food, dress, customs) for a few minutes during your call so that teammates learn about its cultural relevance.
- ☐ Have a virtual pizza party. Send pizza to each location at the same time; then get together on the call or via an Internet chat session to “chew and chat.”
- ☐ Orchestrate a virtual surprise party to celebrate occasions like birthdays and work anniversaries.
- ☐ Provide a virtual break room. Encourage teammates to use social media tools to share information, insights, and even news. Agree on guidelines and policies for appropriate use.
- ☐ Create a forum for team members to create their own social networks around sports teams, television shows, or other events. Have users share updates, rankings, quizzes, and opinions, thus encouraging interaction. Moderators can be rotated on an ongoing basis.
- ☐ When a project ends, ask teammates to send you pictures to share with everyone.



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