Strategies for Hosting a Successful Online Meetup

Checklist

BEFORE THE MEETING

- ✓ Identify the purpose/goal(s)/outcome of your meeting.
- ✓ Develop a clear and concise agenda.
- ✓ Schedule the meeting with set time limits.
- ✓ Determine a document sharing method.
- ✓ Ensure the meeting is accessible to all participants.

AT THE MEETING

- ✓ Enter the virtual meeting room early.
- ✓ Use an ice-breaker activity.
- ✓ Appoint a meeting moderator and a note-taker.
- ✓ Minimize distractions.
- ✓ Use built-in platform features.
- ✓ Include a meeting recap with clear action items.

AFTER THE MEETING

- ✓ Review the meeting notes.
- ✓ Send meeting minutes.

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BEFORE THE MEETING

As the meeting host, there are several measures you can take to ensure that your meeting will be successful, engaging and productive for the participants.

1. **Identify the purpose or goal/outcome of your meeting**. To help keep your meeting focused and productive, it is essential to identify why you are meeting and what you want to accomplish.
    a. What are your expectations?
    b. Determine key issues that you wish to discuss.
    c. Identify the individuals who need to be included in the meeting for outcomes to be achieved. (You can create smaller working groups later; however, your first meeting should consist of all key stakeholders.)

Learn more about SMART Goal-Setting.

2. **Develop a clear and concise agenda.** Agendas are essential to a productive meeting. They help keep participants on track and the discussion moving. Here are some suggestions on how to structure your agenda:
    a. Determine who will address each agenda item and indicate their name next to the topic.
    b. Identify how much time is needed for each item/topic.
    c. List agenda items in a logical sequence or order.
    d. Include links or a section for supplemental information that will help meeting participants make decisions.
    e. Identify where action items or decisions are required.
    f. Set aside items that are off-topic for discussion at the end of the meeting or another date.
    g. Send the agenda at least two days in advance of your meeting to give attendees time to prepare.
    h. Include any reading materials when you send the agenda, so that meeting attendees have time to prepare and reflect.

3. **Schedule the meeting and set time limits.** Use an online platform that will help facilitate group discussion and set a time limit for the meeting. There are many tools available to help facilitate successful meetings; some options include:
    a. Microsoft Teams: Free for all McMaster students and staff. There is no limit on time.
    b. Zoom: Basic accounts are available for everyone, but there is a 40-minute limit on group meetings. If the account holder has a premium license, the meetings have no time limit.
    c. WebEx: Free for all McMaster students and staff. For highly sensitive content, this is a preferred web conferencing platform.

   d. Skype: Free for all and there is no time limit on group meetings.

   Learn more about web and video conferencing tips available for the McMaster community.

   Setting a time limit on the meeting will help keep your meeting focused so you can cover all the agenda items in the allotted time. Let participants know time markers throughout the meeting. Ex: "There are only thirty minutes left in our meeting" or "We have 10 minutes left, are there any essential items left to discuss?"

   Learn more about effective time management.

4. **Determine how documents will be shared.** Ensure all members of the group can access the documentation and information required for the meeting, and keep communications organized. Whatever system you decide to use, ensure that all participants are comfortable using the software/program. Options may include:
   a. Microsoft Teams
   b. Google Docs
   c. Trello
   d. OneDrive (free for all McMaster students and staff)

   Learn more about the applications available through Office 365, available at no cost for McMaster students.

5. **Ensure your meeting is accessible for all those participating.** Consider your audience and offer accommodations well in advance. Remember, accessibility should always be customized to the person; there is no one-size-fits-all solution. Some best practices for accessibility may include:
   a. An accommodations statement in your initial meeting invite. For example, "Please let me know if you require accommodations in advance of this meeting."
   b. Encourage meeting participants to bring headphones to the meeting (if this is available to them) to maintain sound quality if you need to record, transcribe or caption.
   c. Do not select your meeting platform until you know the accessibility requirements of your attendees. In doing so, you can choose the platform with the most appropriate accessibility features for your meeting. Many platforms offer live captioning, transcribing (of recorded sessions), text chat and video capabilities.
   d. If you receive an accommodation request, check in with that person about the accommodation you plan to provide. Check-ins ensure that your accommodation is appropriate and that the attendee knows how you plan to accommodate in advance of the meeting. Should you need support, you can contact the Equity and Inclusion Office, Student Accessibility Services, and MSU Maccess for guidance.

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e. Have a back-up plan. Recording your session and taking meeting notes are good practices to ensure that the information can be accessed in multiple ways. Reminder: If you are recording a meeting, ensure you have the consent of those attending.

AT THE MEETING

Facilitating an online meeting is different than meeting with people face-to-face. In online meetings, it is easier for participants to become distracted by what is happening in their homes, their phones or any type of background noise. Issues such as connectivity, communication delays and the lack of body language and facial cues can all be challenges. The following tips will help you keep participants engaged during the meeting and provide structure to ensure that everyone has an opportunity to contribute.

1. **Enter the meeting room early.** As a meeting facilitator, you want to ensure that your meeting is set up correctly. Go into the meeting at least 15–20 minutes before the meeting is scheduled to take place. Set up any slides, test your volume controls and get comfortable. You may also choose to do the following:
   a. Post a welcome message to the chat.
   b. Let individuals know you will be muting them as they enter the meeting (this is good practice if you have a large number of participants joining the meeting).
   c. Ensure everyone attending is able to participate: i.e. audio, text chat or video functions are working.

2. **Include an ice-breaker activity**. Get everyone in your meeting comfortable with one another. Think of a fun activity to start your meeting that includes introductions. The meeting host can help with this by directing whose turn it is to contribute. Without someone indicating who will start and go next, it can get confusing for participants. This is also dependent on the size of your group. If you have a large number of participants, you may choose to use the text chat feature as a place for people to provide introductions.
   a. In the opening activity, participants can include their name and Faculty/program of study, as well as their role in the meeting.
   b. You can also use the chat function for comments and questions. This strategy ensures that participants do not interrupt one another. However, interruptions can happen inadvertently due to lagging and internet connection problems.

3. **Appoint a meeting moderator and a note-taker.** Appoint different individuals to help you facilitate the meeting. These people can take on different roles in the meeting, including:
   a. Moderating the chat
   b. Tracking action items
   c. Keeping everyone focused on the agenda items and moving the conversation forward

d. Acting as a timekeeper
e. Taking meeting minutes

Meeting minutes should be brief, not verbatim. Keep minutes focused on action items, decisions, items to discuss at the next meeting and a list of participants. To keep things concise, try using bullet points or short form.

4. **Minimize distractions.** Try to find a quiet space to host the meeting. Let family members or roommates know when your meeting is scheduled and ask that they do not interrupt you during this time. It is also helpful to use headphones or earbuds instead of your computer audio, as this might help ensure more precise communication.

5. **Use built-in platform features**. Using some of the features already built into the platform will help you facilitate the meeting and keep it running smoothly. Options might include:
   a. Muting or asking participants to mute themselves when not contributing.
   b. Use the chat feature for questions as they arise from the discussion and the moderator(s) can address the questions submitted before moving on to the next agenda item.
   c. Use emojis or reaction features (ex: thumbs up, raise your hand) if you are in agreement with a discussion point or have an immediate question. This feature can act as a non-verbal cue for the speaker and the moderator.
   d. Share your screen. This will help guide participants through the agenda and can also be used if you are sharing a video or a slide deck.
   e. Polls, Q&A features and other interactive components can engage participants and make the meeting more fun.
   f. Record the meeting to help with note-taking and the creation of minutes following the meeting. **Important note:** You must let participants know that the meeting is being recorded and how the recording will be used.

6. **End the meeting with clear action items.** Use the final few minutes in your meeting to recap action items (the meeting host should be identifying and recording these as you move through the agenda). Determine who is responsible for following up on each action, and agree on deadlines.

AFTER THE MEETING

Once the meeting is over, take a few minutes to organize your notes and jot down any additional thoughts. Ensure that you have shut down the meeting properly, upload any recordings to the cloud or your computer (if you are recording the meeting), create an invitation for the next scheduled meeting and send it to participants' calendars or email.

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1. **Review the meeting notes**. Connect with meeting moderators (if assigned) and ask that they share their notes with you. Review their notes and yours. If there are any inconsistencies, seek clarification for the moderator(s). Due to the meeting taking place in an online format, some of the notes may be different, as some communication items might have been missed or misinterpreted.

2. **Send the meeting minutes**. Upload the meeting minutes to your shared document folder and follow up with an email to let participants know where they can access the minutes. Minutes should be sent within two–three days of the meeting to ensure that individuals have time to review and take action on items as required. Ask participants to confirm that the meeting minutes are accurate, and provide a deadline to propose any changes or edits to the minutes.