



Virtual Meeting Resources

To halt the spread of COVID-19, organizations are moving to virtual meetings, representing a shift in how we maintain communication with each other and new considerations to reflect on in order to effectively collaborate and share information. This guide is intended to help you navigate questions such as, which virtual platform is the best fit for the goals and purposes of your meeting? What are some best practices, tips, and strategies for holding virtual meetings? How do we maintain connection and community with each other online?

This guide contains information about different virtual meeting platforms, technological considerations to take into account, and other resources and strategies for holding successful virtual meetings!

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Virtual Meeting Platforms¹

Meeting Platform	Cost	Participant Limit	Time Limit	Requires participants to have account?	Chat Feature	Recording	Breakout Groups	Screen Share	Conference Phone	Other Features
Zoom	Free	100	40 minutes on meetings with three or more participants Unlimited 1-on-1 meetings	No	Yes	Yes	Yes (free plan currently has this feature)	Yes	Yes	Whiteboard feature allows for screen share and co-annotation of the whiteboard with participants.
Zoom Paid	\$14.99 per month per host	100	24 hours	No	Yes	Yes	Yes	Yes	Yes	Whiteboard feature allows for screen share and co-annotation of the whiteboard with participants. Additional add-ins: <ul style="list-style-type: none">• Webinar Add-in (\$40/mo): Allows 10,000 attendees with up to 100 presenters. Attendees can raise hands, use chat, and respond to polls.• More participant add-in (\$65/mo): Allows up to 500 active participants that can be put into breakout groups.
Skype	Free for Skype to Skype calls	50	Group video calls are subject to a limit of 100 hours per month with no more than 10 hours per day and a limit of 4 hours per individual video call. Once these limits have been	Yes	Yes	Yes	No	Yes	No – Calling a mobile phone or landline through Skype requires Skype Credit or a subscription	Skype Translator: Voice translator can translate conversations into 10 languages. Text translator is available in more than 60 languages.

¹ Additional platforms to consider for informal chat features include Whatsapp, Facebook Messenger, and Facetime (Apple devices only).

Meeting Platform	Cost	Participant Limit	Time Limit	Requires participants to have account?	Chat Feature	Recording	Breakout Groups	Screen Share	Conference Phone	Other Features
			reached, the video will switch off and the call will convert to an audio call.							
Google Hangouts	Free	10	None	No – Although someone in the hangout has to approve the external guest	Yes	No	No	Yes	No	
Microsoft Teams	Free for now due to COVID-19 Pricing starts at \$5 per month	10,000	None	No	Yes	Yes	No – Although creating separate channels can serve a similar function to breakout groups.	Yes	Yes	You can create separate conversation channels to organize and discuss different topics. Integrated with Office 365, so documents and information can be shared.
Slack	Free	1:1 voice and video calls are free	None	Yes	Yes	No	No – Although creating separate channels can serve a similar function to breakout groups.	Yes	No	You can create separate channels to divide people into different teams. Integrated with other apps, like Google Drive and Office 365, for sharing files.
Slack Paid	\$6.67 per month	Group voice and video calls of up to 15 people	None	Yes – Although you can invite guests outside of your company to join the channel.	Yes	No	No – Although creating separate channels can serve a similar	Yes	No	You can create separate channels to divide people into different teams.

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							function to breakout groups.			
WebEx	Free for the Personal Plan	100	None	No	Yes	No	Yes – This feature may be part of the paid plan.	Yes	Yes	Q&A, polling, and raise hand features for interactive meetings. Interactive whiteboard for sharing ideas visually.

*Please note that the information in this chart is subject to change. Please refer to each platform's website for the most recent features and pricing. Many platforms are offering their services at a reduced or no cost during the COVID-19 pandemic.

Technological Considerations

- **Select a meeting platform** that will best meet the needs of your meeting.
 - Considerations include: Is there a call-in number for those who are unable to join online? Are there ways for them to participate?
- **Stable internet connection** (for those connecting online) or **audio connection** (for those connecting through phone).
- **Headphones**: Headphones often provide greater audio clarity and minimize disturbances to those around you. Using a headset with a **microphone** will also provide greater audio clarity for meeting participants to hear you speak.
- **Mute button**: It is good practice to mute yourself when you are not speaking to minimize background noise. In some meeting platforms, the host can mute the participants.
- **Webcam**: Many laptops have a built-in webcam and desktop computers can connect to an external webcam. Test and turn on your webcam (often through the meeting platform) if comfortable so you can have facetime with your colleagues. This also helps participants read each other's facial cues and body language.
- **Test your technology ahead of time!** This will help the meeting begin on time if you are able to resolve technological issues ahead of time.

Virtual Meeting Tips and Practices²

What to do before the call (Host)

Action	Description
Install the video conferencing software you plan to use ahead of time	Test the meeting technology you plan to use ahead of time and familiarize yourself with the available features. Call a colleague to test that everything works properly.
Send pre-call materials to all participants	Include a direct download link to the software you expect everyone to use, provide user instructions, and share meeting-specific login information. Confirm the meeting's time and date and be specific about time zones. Also, use this as an opportunity to share the agenda, call notes, or any meeting-related documents ahead of time. That way, participants can have a chance to open and review those materials before the call starts.

² These tips and practices were adapted from articles on [Quill.com](#) and [NTEN](#).

Assign meeting roles	Assign meeting roles to participants. If meetings happen on a regular basis, rotating meeting roles each meeting can keep team members engaged and help them feel a sense of ownership over the meeting. See Meeting Roles for a description of common meeting roles.
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What to do before the call (Participants)

Action	Description
Install the video conferencing software you plan to use ahead of time	Spend a few minutes experimenting with it to familiarize yourself with the available features and call a colleague to test that everything works properly.
Wear headphones	To minimize echo and ensure you hear other web conference participants clearly, use headphones. This is also a considerate step so the people surrounding you or those in the neighboring room are not distracted by your conversation. Find your mute button (in your headphones or web conferencing program) and keep it handy. It is a good practice to mute yourself when you are not talking to reduce background noise in the conversation.
Shut down other applications and programs	End any processes you are not currently using so your machine can run faster.
Test your internet connection	To test your internet connection, search for “internet speed test” in Google. Click on the “Run Speed Test” button. In a few minutes, the test will tell you what types of activity your internet connection can handle.
Find a quiet, comfortable space with minimal distractions	Place yourself in a private room or booth with minimal background noise and a strong Internet signal. This also helps meeting participants focus on you.
Find good lighting	Proper lighting makes it easier for people to see you and your body language. It is a good idea to refrain from sitting in front of a window due to the glare.
Open your presentation materials beforehand	This allows you to avoid having to load documents or web pages during your meeting.

What to do during the call (Host)

Action	Description
Start every call with an introduction and check-in question or icebreaker activity	If the participants are new to each other, provide time for each person to introduce themselves and respond to a check-in question. This briefs people on each other's roles and expertise. If the participants are familiar with each other, a check-in question or icebreaker activity is a great opportunity to create a positive group atmosphere and help participants relax and ease into a group meeting. Many icebreakers you do in a face-to-face meeting can also be done virtually.
Review the agenda	Confirm the goals of the meeting and the different items to be discussed. With an understanding of what is to come, participants can be more engaged and involved with the conversation. This also sets expectations for the goals and outcomes of the meeting, to make sure the meeting stays on track.
Co-create your team's rules of engagement or virtual meeting norms	Meeting norms should be co-created and discussed with your team in order to reinforce expectations and help improve the virtual meeting process. See Example Meeting Norms for example meeting norms to discuss.
Use techniques for visual brainstorming, energizers, voting, and interactive activities!	Particularly with longer meetings, energizers or interactive activities are a great way to break up periods of sitting. There are also tools available for participants to interact with each other and provide feedback. See Icebreaker and Energizer Activities for a list of energizers. See Virtual Engagement Tools for interactive tools to use in a virtual meeting.
Make sure both online and call-in participants can engage in the discussion	For example, if someone is sharing their screen, request that they read what is on their screen for call-in participants to follow along.
Consider recording your meeting	Many online platforms have a feature to record the meeting. Recording a meeting enables participants to revisit discussion points and share the meeting with those unable to attend. If you decide to record the meeting, make sure to communicate this to all

	participants and confirm if they are alright with the meeting being recorded.
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What to do after the call (Host)

Action	Description
Summarize the call highlights and send to participants	The notetaker will summarize notes and action items from the call and share that with participants.
Reiterate agreed-on action items	The host should plan to send a concise follow-up email that confirms action items, including who is responsible for each action item, and outline the steps needed to move forward. This is helpful for participants who do not have time to review the meeting minutes in detail.

Meeting Roles³

 **Common Meeting Roles**

	Facilitator	Guides meeting participants through the agenda, keeps the team on track to achieving the meeting's objectives, and ensures everyone's voice is heard.
	Note-taker	Records Learnings, Decisions, and Tasks, and takes general notes during the meeting. Provides a verbal high-level summary at the end of the meeting.
	Time-keeper	Reminds people of meeting time constraints and calls the question of whether to continue the discussion if time runs out.
	Technology-keeper	Sets up meeting technology (video call, microphone, etc.) and troubleshoots as needed.



³ This graphic comes from [Meeteor](#).

Example Meeting Norms

Below are example virtual meeting norms:⁴

- We will use the technology that is most accessible to everyone on our team.
- Test your technology before the meeting and resolve any technical issues.
- Use a phone line with audio clarity and stability.
- Find a quiet space to participate.
- Do not multi-task (do other work) during the meeting.
- Follow an organized line-up to ensure each person has a chance to respond.
- Use the mute button when you are not speaking to prevent transmitting background noise.
- Use the meeting platform's chat feature if you have questions.
- Working remotely can be isolating at times – Turn on your video if comfortable so you can have facetime with your colleagues.

Icebreaker and Energizer Activities

- Virtual icebreaker questions. Examples:
 - What is your favorite food and least favorite food?
 - What was your first job?
 - Tell a story about your name
 - What is your favorite comic strip or book?
 - Favorite moment of [insert any time frame]
- Online meeting bingo
 - Bingo card with things commonly said during online meetings for participants to follow.
- “Take a photo of something...”: If your platform has a chat system or a back channel where photos can be posted, you can ask questions that can be answered with pictures.
 - Your shoes
 - View outside your window
 - Your work area
 - Something on your desk
- “Touch blue” game⁵
 - The facilitator calls out something to touch, for example: “Touch blue!” Each person then has to move and touch something with that color (a blue marker, a co-worker with a blue shirt, etc). The facilitator continues, “touch red... yellow... something fluffy...” This is great with video teleconferences as you see your colleagues stretching and moving around together

Activities to close the meeting:

⁴ These examples were posted on [NTEN](#).

⁵ This activity comes from [350.org](#).

- Appreciation circle: A positive and grounding way to end a meeting is with a round of appreciations, where each person expresses appreciation for a team member, the group, or an action accomplished together.
- “Rose, bud, thorn” or “Pluses and Deltas”: Each person shares something positive that is working well (“Rose” or “Plus”), an area of opportunity or growth (“Bud”), and something that isn’t working well or can be improved on from the meeting itself or the meeting outcomes (“Thorn” or “Delta”). This will help assess what worked well during the virtual meeting and what can be done differently next time.

Virtual Engagement Tools

Tool	Purpose	Cost	Description
Poll Everywhere	Engage with meeting participants by embedding questions in your presentation and receive responses in real-time.	Free for the Intro Plan.	Create unlimited polling questions for up to 25 people to respond to (or up to 700 with the “Present” plan - \$120/yr). The audience responds on the web or by texting.
Google Doc	Collaborating on a shared document with teammates.	Free Requires a Google account for the person who creates the document, but others do not need a Google account in order to access and edit it.	Collaborate and work on documents with your teammates at the same time. People can see what others add or revise to the document.
Interactive whiteboard (available through Zoom and WebEx)	Visually collaborate with others.	Feature of the free Zoom and Webex plans	An interactive whiteboard allows team members to visually present ideas, brainstorm, and interact with each other.
Linoit	A website that allows you to make an interactive bulletin board.	Free	Participants can post sticky notes on this virtual bulletin board to brainstorm ideas.

Safety and Privacy Considerations

With the increase in people working from home or at least remote locations, Zoom meetings have become very popular. That increase has led to an increase in the number of attackers seeking to exploit its weaknesses. Here are some helpful tips for staying safe and keeping your online meetings private:

- When you create a meeting request, make sure you require participants enter a **"waiting room"** from which they are admitted to the meeting by the organizer. This helps avoid so called "Zoom bombing" where uninvited guests find their way in.
 - In lieu of a link – which above we recommend you not necessarily trust – please use your internet browser to access the Zoom help center and search for "Using a Waiting Room with Zoom Rooms".
- There are also reported cases of people keying in random ten-digit meeting IDs and then screensharing content. This can be avoided by **requiring a meeting password**.
 - Again, go to the Zoom help center and search for "Meeting and Webinar Passwords".