

Make every virtual meeting a success!

Use this checklist to plan your virtual meetings

<input checked="" type="checkbox"/>	Before sending invitations...	
	1.	Schedule conference call with lines to accommodate the number of callers
	2.	Set up Webmeeting / Video Conference (as needed)
	3.	Schedule meeting room for in-person attendees (big enough for group)
	4.	Schedule AV Resources – Overhead Projector, PC Display, Screen, Microphone, Polycom, other resources required for web / video conference
	5.	Assign roles to participants: Meeting Facilitator Scribe Meeting Set Up – Manage AV to facilitate virtual participation during meeting
	6.	Refreshments for in-person participants
	7.	Refreshments for virtual participants (coffee or meal gift certificate)
	8.	Create invitee list based on agenda and expected meeting outcomes: <ul style="list-style-type: none"> ➔ Brainstorming on Features / Functions / Process Invite front line Subject Matter Experts ➔ Status Updates Invite Stakeholders and owners of adjacent or dependent projects ➔ Go/No Go Decisions Invite Decision Makers
	9.	Plan team building activity to open meeting
	10.	Plan whether / how virtual attendees will participate in team building activity

<input checked="" type="checkbox"/>	Include in meeting invitations...	
	1.	Conference Call Phone Number
	2.	Link to Web Meeting
	3.	Meeting start time and end time
	4.	Meeting times shown in local time (adjust for time zone)
	5.	Meeting location for in-person attendees: street address, conference room name, directions for people coming from out of town
	6.	Documents or pre-readings – links or soft-copy documents
	7.	Names of presenters, titles, company names
	8.	Topics to be covered – time allotted for each