Virtual meetings checklist

This document provides a high-level list of things to consider when planning and delivering virtual workshops. It draws on knowledge and experience from the Q team.

At the end of this document we've included some links to additional information and resources that you might find helpful.

Planning the meeting

Set a clear purpose and objectives Make sure you set clear aims and objectives for the meeting early on. These will help to shape the design and content of the session.	
Determine the mode you want people to be in for activities Decide the input you are looking for and how you want people to feel. For example, do you want people to be creative, reflective, or strategic? Keep this in mind when planning the activities.	
Consider using collaborative tools and methods Designing engaging sessions is even more important when working virtually. Design activities where everyone can contribute – either out loud or in writing. Look at Liberating Structures or Q CAPS cards for inspiration.	
Take advantage of other platforms (when it's right) Explore tools such as Miro, Mural and Stormboard to enable more collaborative sessions. But make sure you're clear on the value additional platforms will add to your meeting.	
Plan for how to keep energy up in the sessions Virtual meetings are more tiring. Keep your meetings shorter than they would be face to face and schedule breaks. If it needs to be longer, consider splitting the meeting into two parts or building in breaks. Vary the content of the session to suit different learning styles. Keep presentations short; no longer than 10 minutes is ideal.	

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Send information to participants in advance Set expectations in advance for how you want people to engage and how you'll be working together. Allow people time to test out any new technology you might be using, so they feel more comfortable on the day.	

Team roles

Be clear on roles and responsibilities You may need more people involved than you would face to face. Consider having 'back up' roles in case people have internet problems. Develop detailed 'facilitation notes' with precise timings and instructions which the team can refer to, so that everyone knows what will be happening.	
Have a team member responsible for technology If you have the capacity, having a dedicated person to look after the technology can help things run more smoothly. It also allows the hosts/ chair to concentrate on presenting/facilitating.	
Make plans for how you'll communicate We found WhatsApp works well for team communications during an event - inbuilt chat functions can be difficult to follow when you are chairing or presenting.	
Hold a team huddle to run through the plan If there's time, run through the plan to make sure everyone in the team is clear on the structure and flow.	

On the day

Ask the team to join the call early Allow 15 minutes before the call starts for the team to set up. It will give you time to check everything is working and run-through any final questions.	
Set up a waiting room (if your platform allows) The Zoom waiting room function allows the host to control when participants join a meeting. You can admit attendees one by one or hold all attendees in the waiting room and admit them all at once.	
Set some 'ground rules' for how you'll work together Be clear about how you want people to participate and interact in the session. Let them know what you want to achieve in the meeting.	
Acknowledge that things might go wrong Say out loud early on that technology might fail or not run smoothly. Naming this helps to set the tone and put people at ease.	
Introduce the technology or platforms you will be using Tell people what, how and when you will be using technology throughout the session. Plan alternative ways people can contribute if the technology doesn't work for them on the day.	

Additional information and resources
- Find out more on Liberating Structures
- Download the Q Creative Approaches to Problem Solving (CAPS) toolkit
- NHS Horizons Top tips for virtual meetings and events
- The Design Council The quest of turning an event from physical to digital
- Recorded webinar on Running remote meeting and workshops in Miro
- Mural The definitive guide to facilitating remote workshops
- Zoom Video tutorials for meetings and webinars