# A Broker's Guide to Virtual Meetings

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Introduction

The coronavirus (COVID-19) pandemic has caused businesses across the country to make significant changes to their day-to-day operations. Among many other changes, businesses have had to change the way they meet with employees, customers and prospects to prioritize safety and prevent the spread of COVID-19. Instead of meeting in-person, businesses have leveraged the power of technology to hold meetings virtually.

Most laptops, tablets and smartphones have built-in webcams and microphones so employees can dial in to a virtual meeting from anywhere and at any time. These technological advancements have created affordable and easy-to-use tools to help businesses—both small and large—stay virtually connected. Web-based technology will continue to advance to keep virtual communication attainable and meet business needs.

Even as the COVID-19 threat shifts and offices reopen, virtual meetings will continue to be a viable way to conduct business with employees, customers and other stakeholders. As crucial times near, including open enrollment and renewals, it's never been more important to invest in your business's virtual meeting capabilities. In these times, showing clients a spreadsheet and general speech won't cut it—you're going to have to go above and beyond and leverage any and all visual components you can.

However, conducting an effective virtual meeting isn't as simple as turning on your webcam. Getting your team up to world-class standards also won't happen overnight. Virtual meetings require more planning than in-person meetings to be successful, but it's not impossible. This guide will serve as an introduction to virtual meetings and help you learn how to hold an effective virtual meeting.
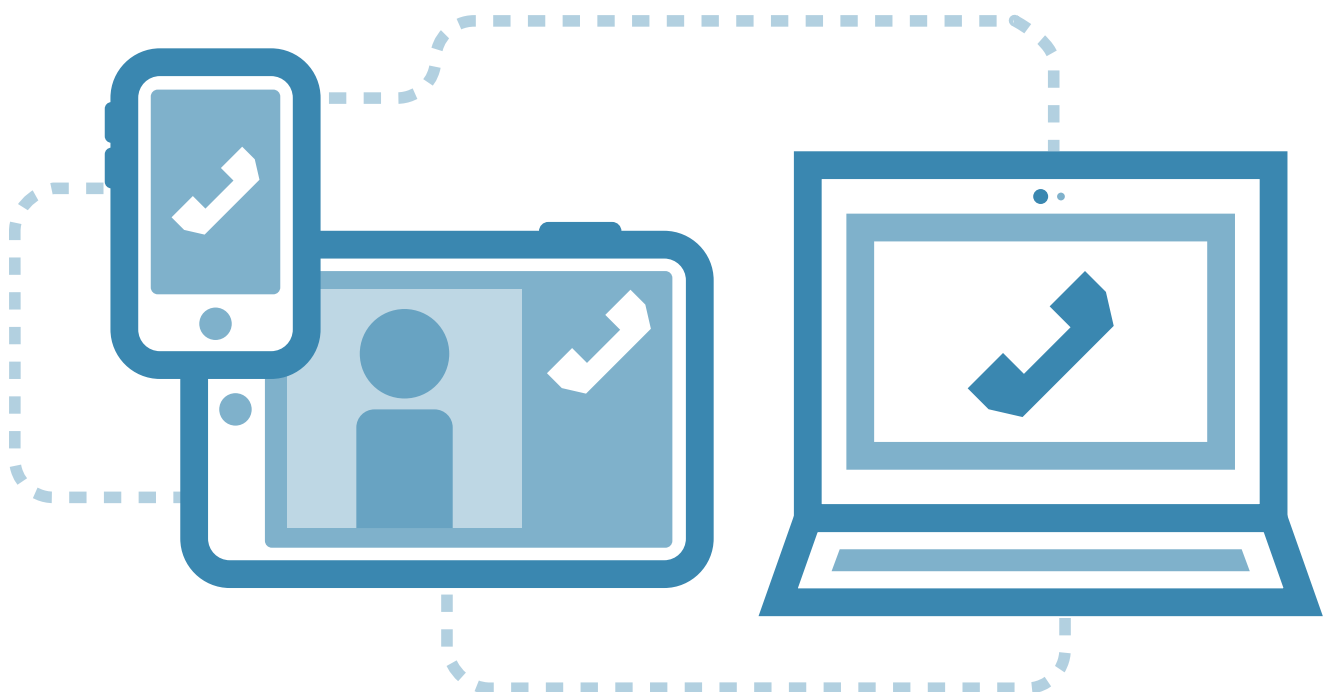
Getting Started –
Finding the Right Tech

Holding world-class virtual meetings isn't as simple as you might think. It often involves extensive planning before the meeting even starts. This is particularly true if your organization hasn't held virtual meetings before, because you'll likely need to find the right technology for your business needs. And even if you've held audio or video calls before, you probably haven't done it at this current scale.

That's why the first step in holding effective virtual meetings is finding the right technology. Chances are, you may already have an existing solution that will work for you. But if you don't, there's good news. The advancements in technology mean that you now have a plethora of affordable options available to you. Gone are the days when licensing or purchasing reliable web and video conferencing technology would cost you a significant amount of money.

Whether you plan on leveraging your current solutions, evaluating upgraded solutions or researching solutions to get started, it's important to keep in mind that you need to make a decision relatively quickly. Every broker across the country is facing the same challenges you are, and many have already made steps toward leading successful virtual meetings. To ensure you're staying ahead of your competition, virtual meetings should be a top priority.

Evaluate Your Business Needs
With that being said, an abundance of options can make your decision harder. Before you start to explore and evaluate vendors, ask yourself these questions:

- How many participants will be on each call?

- How often do you intend to schedule video calls?

- Are there any applications that you need to integrate with your video calls (e.g., Microsoft Office, Adobe Acrobat or Salesforce)?

- What is your budget for video and web conferencing technologies?

- How much training will you need to provide for your employees?

- Are there any solutions you already have?

Asking these questions will help you determine exactly what you're looking to get out of a web and video conferencing platform. From there, you'll be prepared to start researching platforms and making important decisions.

Evaluate Your Current and Prospective Options
After identifying what your business needs are, it's time to research and evaluate vendors before you make your final decisions. This step should also include evaluating any current solutions you may have. If you're exploring new options, one thing to note is that it's a good practice to choose one platform and stick to it. After attendees download the platform once, it'll be easier to join meetings later.

How many participants does the platform support? Some platforms are great for large conference calls, while others are better suited for one-on-one calls. You'll need to find out how many participants can be on a call and see how that aligns with your business needs. You should also consider whether the platform charges per participant, offers a flat fee or is free to connect, regardless of how many will be on a video call.

How easy is the platform to use? This might not seem important, but ease of use and design can make or break your video or web meeting. If your participants can't figure out how to use the platform you've selected, they may not be able to join the call, and they might be frustrated or confused. Consider enrolling in free trials to test out the platforms extensively to ensure they're user-friendly and intuitive.

How many different types of meetings does the platform support? Does your organization hold the same types of meetings? Or, do you hold presentations, webinars, Q&As or lectures that require participants to be muted? Not all platforms are the same, and you'll have to evaluate which platform best fits your needs.

Does the platform require use of additional technology or accessories? Some platforms require the use of headsets or microphones. If your organization doesn't have these accessories, you'll have to factor in the additional cost of supplying employees with the tools they need to hold virtual meetings.

Does the platform support mobile usage? In today's world, you can't assume that all meeting participants will access the meeting from their computer or laptop. As such, you'll want to evaluate whether the platform supports a cohesive mobile experience to accommodate all users.

Does the platform offer a recording option? In some cases, video recording capability is essential in case you need to save the meeting highlights for later or share the recording across the company. Most platforms offer this capability, but limit how much recording space is available and differ in how the recordings are stored.

Does the platform allow screen sharing? In many cases, having the ability to share your screen with meeting participants will significantly increase engagement and comprehension among participants. If this is a component that's important for your organization, be sure to check that a platform has this capability.

Does the platform integrate with other applications? Some platforms allow for third-party application integration (e.g., Microsoft Office and Google Calendar), which can help improve ease of use and screen sharing ability. Moreover, platforms that provide plug-ins for email and scheduling apps make it easy to schedule virtual meetings.

Again, many of the top platforms offer free trials during which you can evaluate whether it's the right platform for your business. There are many web and videoconferencing platforms available, so find the right software and features to support your business. Once you select the right tech, it's time to move on to the next step of the process, which involves planning for the meeting.

Before the Meeting

If you want to have a successful meeting, you need to properly plan and prepare. In some cases, preparing for a virtual meeting is similar to how you'd prepare for an in-person meeting. You'll still want to review who the meeting is with, draw up meeting notes and create any necessary deliverables. If your meeting is with a prospect, you'll want to research their business and find out how you can impress them.

Aside from these general meeting preparations, there are a handful of other things you can do before a virtual meeting to make sure it goes off without a hitch:

Send a calendar invite—Make sure to send a calendar invite to meeting participants as far in advance as possible. Be sure to include instructions for accessing the platform you've chosen to host the meeting on, as well as a meeting agenda and any required prep work in the invite.

Create an agenda—The agenda outlines the topics to be discussed, assigned facilitators and amount of time to be spent on each topic. Budget time at the start of each meeting for introductions and small talk before moving to the first topic. Attendees may have a full calendar, so be clear on the purpose of the meeting and provide a timed agenda with topics and assigned facilitators. This will help invitees decide their attendance if they have multiple meetings at the same time. Share this prework at least 48 hours in advance.

Establish ground rules—It might be helpful to have an agreed way of working, such as stating your name before talking or muting when not speaking. This helps keep the meeting efficient and remove distractions.

Test the technology—It's important to join the meeting at least five minutes early to test your connection, microphone and video.

Look professional—If using video, present yourself with appropriate grooming, hygiene and attire. That means mirroring what you would wear in person and keeping in mind whether it's an internal or external meeting.

Make sure you have the best possible lighting—In line with making sure you're dressed properly, it's important to make sure the background of the video frame is professional, too. Ensure you have adequate lighting when your camera is in-use. The light source (lamp or window) should be in front of you to avoid shadows or reflections. Avoid bright backgrounds that may cause your face to be darkened.

When it comes to virtual meetings, it's crucial to invest in preparedness. Setting expectations beforehand can go a long way and positively impact a meeting's effectiveness. By taking the time to address these key concepts, you'll find yourself feeling prepared for virtual meetings. While it may seem like a lot of planning, it will become second nature as time goes on. Proper planning is absolutely essential for ensuring that your virtual meeting is successful.

During the Meeting

Meeting hosts and attendees may have slightly different roles when it comes to facilitating the virtual gathering, but there are some general tips that can help everyone. Once it's time to dial in, keep the following tips in mind:

- **Go over ground rules—**To ensure everyone is on the same page, be sure to run through meeting ground rules when the meeting starts. These rules can include the following:

  o Recap the purpose of the meeting and planned agenda. Reinforce the group's intent to stick tightly to the agenda in order to start and end on time.

  o Identify how attendees will participate in the meeting, and remind participants to go on mute when not speaking.

- **Choose a moderator—**This should be established in the agenda. The moderator will keep the meeting moving and engage attendees. If attendees don't know each other, make those introductions to help everyone feel connected and welcome.

- **Stick to the agenda—**The host should consider assigning a time checker to keep the meeting on track. When possible, end a few minutes early to give people time to get to their next meeting.

- **Encourage interaction—**Encouraging people to speak up, especially in a virtual setting, is not always easy. Everyone should actively be doing something to support the meeting's purpose and objective (e.g., talking, screen sharing, monitoring the side chat channel, note taking and running slides). This move transforms someone from an attendee to a participant. Try to avoid having one person talking for more than five minutes.

- **Turn on video—**Video is effective and makes people feel more engaged because it allows attendees to see each other's non-verbal clues. That, in turn, humanizes the virtual meeting room and strengthens personal connections.

- **Add visuals—**One of the best ways to prioritize and ensure audience engagement is to add visuals to your meetings. Leveraging PowerPoints and PDFs to share with the audience is a great way to lead them through your meeting and keep them engaged. Professional presentations have never been more important. Showing a client a bare-bones Excel spreadsheet simply won't cut it in this circumstance.

- **Do not multitask—**A virtual meeting is not the time to check and respond to emails or text messages. The use of video could cut down on multitasking.

- **Expect (and accept) the unexpected—**In a remote work setting, it's not unlikely to have a crackly connection or interruptions from a barking dog or talking child. Approach those unexpected moments with empathy.

When wrapping up the meeting, provide attendees some time to ask questions or share concerns. That could help increase engagement and ensure that attendees are still present and listening. Every attendee should have an opportunity to speak, whether or not they were assigned agenda topics. Approach meeting etiquette as if the gathering was in person.

After the Meeting

Once the meeting is finished, it's important to check for understanding and share a recap of what was discussed. If the meeting was a casual check-in, there may be no need for a recap. However, if there are any outstanding action items or missing attendees, it could be helpful to send a recap to outline next steps and responsibilities. If this was a standing meeting, it might be an opportunity to share the next meeting's agenda as well to give attendees time to prepare. It's all about sharing a transparent record of work progress.

Keep the following three steps in mind after each meeting:

Finalize documentation—An effective meeting means discussions and decisions are well documented. Documentation serves as a "single source of truth" to keep the group moving forward and quickly catch up anyone who wasn't in attendance. Send a follow-up within 24 hours of the meeting that identifies agenda items covered, conclusions reached and who is responsible for next steps.

Share resources—Establish a shared file location for all documentation and resources to allow individuals to self-serve for follow-up items.

Complete your homework—Most work gets done outside of meetings except when the meeting is intended as a working session. If you were assigned a follow-up task, schedule time on your calendar to complete it. Other people are depending on you in order for the group to succeed.

When it comes to virtual meetings, it's crucial to invest in preparedness. Setting expectations beforehand can go a long way and positively impact a meeting's effectiveness. By taking the time to address these key concepts, you'll find yourself feeling prepared for virtual meetings. While it may seem like a lot of planning, it will become second nature as time goes on. Proper planning is absolutely essential for ensuring that your virtual meeting is successful.

Conclusion

While it's uncertain what exactly the future holds as it relates to the COVID-19 pandemic, you can expect that the trend of virtual meetings will last. As such, it's essential that your business embraces the opportunities that virtual meetings can provide and invests the necessary resources into preparing for this practice. Don't miss out on this emerging trend—find the right tech and review the tips provided within this guide to lead an effective virtual meeting today.