



TIPS FOR FACILITATING AN ONLINE MEETING

A 60-minute Webinar

3 KEY AREAS

What is the first step to having a productive, effective meeting? _____

BEFORE THE MEETING ~ PREPARE TO BE SUCCESSFUL

1. _____ the meeting far enough in advance for others to plan.
 2. Ask for _____ in advance.
 - a) _____
 - b) _____
 - c) _____
 3. Set _____ within the agenda; example: each person brings...
 - a) an _____ to share
 - b) _____
 - c) _____ for others in your group
 - d) what _____ (or didn't) and why
 - e) any _____ they are facing (or have faced)
 4. _____ the agenda to participants well in advance to allow them to prepare and/or ask questions.

The agenda should include:

 - Date, times (start *and* end times), link if you already have it
 - Participants expected to attend
 - Topics to be discussed
 - Time allotted to each agenda item if appropriate
 - Person(s) responsible for each agenda item (may be one or all, depending on expectations set)
 5. _____ your meeting.
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DURING THE MEETING ~ WHAT IT TAKES TO MAKE IT WORK

1. _____ on time.
2. Stress the _____ nature of your meeting.

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3. Establish _____ . Examples:
 - a) Everyone participates.
 - b) Different opinions are welcome – and encouraged.
 - c) Challenge ideas, not individuals.
 - d) Follow through on your commitments.
4. _____ the agenda.
5. Prepare and ask _____ questions to draw out their thoughts:
 - a) “How could we...”
 - b) “What do you think might happen if...”
 - c) “What are your thoughts about...”
6. If needed, _____ action steps on each item to individuals, with clear deadlines.
7. Consider using a “ _____,” if useful.
8. Allow _____ at the end of the meeting (include in the agenda) for questions and answers and a summary of any action steps discussed, including roles and deadlines. You can also request topic suggestions for the next meeting.
9. Consider reviewing the actual meeting _____ to determine what was done well and what could be improved at the next meeting.
10. _____ the next meeting if appropriate, with tentative agenda items, which will be confirmed in advance of the meeting.
11. End on a _____.
12. _____ if you’re done, even if it’s earlier than expected.

AFTER THE MEETING – WHAT NOW?

1. Determine if the online meeting was _____ :
 - Were all expected participants in attendance – and on time?
 - Were all topics on the agenda covered?
 - Was the original objective met – the reason you had the meeting?
 - Was the timeline followed?
 - Did everyone leave knowing what roles or tasks they were assigned, if any, and what deadlines have been established?
2. Prepare and _____ meeting notes with any action steps: who, what, and when, if appropriate, as well as a date for the next meeting. Include **expectations** for your next meeting.

What are TWO things I will do to ensure the success of my online meetings?

- 1) _____

- 2) _____
