BEST PRACTICES:
Virtual Meetings & Presentations

Under normal circumstances when we want to tackle a complex problem or have an important discussion, we would get the relevant people together in the same room. The COVID-19 outbreak has fundamentally challenged this way of working - from the restriction of travel for people, to limiting the size of meetings and social distancing, to employees self-isolating and working from home.

Through careful planning, thoughtful design, and quality facilitation, it is possible to deliver effective presentations virtually.

BEST PRACTICES: SETTING THE STAGE

1. **Eliminate Distractions**
   - Move away from sources of noise – have those who are not speaking should mute their microphones.
   - Communicate with your family and set quiet times during your work calls.

2. **Use a Headset**
   - Avoid using computer speakers if possible – the difference in audio quality is noticeable to the audience.
   - If you do not have a headset, use headphones through your phone or laptop.

3. **When Sharing, Keep it Tidy**
   - Close everything you are not using on your desktop.
   - Launch what you are going to share and have it ready to go.
   - Disable pop-ups and any messaging windows.

4. **A Moderator Can Help**
   - Capture questions in the chat box as well as verbal contributions.
   - Keep the person speaking on-topic and moving toward the objectives of the call.

5. **Connection Speed**
   - If possible, use a hard connection/wire/ethernet cable into the computer or docking station from a router – this is more robust than wi-fi.
   - If you are relying on wi-fi, disable other devices in the area for the duration of your call.
   - If your family is also at home, have them download shows/movies in advance so they are not competing for bandwidth.

6. **Software**
   - Ensure everyone has the technology needed – check beforehand to clear any technology hurdles before the meeting.
   - Test connection and comfort level with client platforms ahead of time.

7. **Talk Amongst Yourselves**
   - Start a sub-chat window with just your team to coordinate speakers, transitions, share information, etc.
   - To make this work effectively, the presenter will need a double-monitor setup; be very aware of what you are sharing and communicating.

8. **Prepare Your Audience Ahead of the Meeting**
   - This document can be used as a resource for participants if you provide it along with the agenda.
   - Good practice is to provide the agenda in the email meeting invitation.

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BEST PRACTICES: DESIGN

9. Simplicity and Brevity

- Keep your slides as simple as possible.
- Be clear and concise with the agenda and intended outcomes of the meeting.

10. Your Face

- Engagement is more difficult virtually, so seeing team members faces is more important than ever.
- Team member introduction slides with headshots are essential.
- Introductions on both sides of the conversation, are ideal if feasible.
- Avoid live video unless your network can handle the increased bandwidth.

11. Images and Visual Interest

- Use more images and visuals and reduce text. Allow the audience to focus on your voice, rather than reading the slides, and tuning you out.

12. Organization

- Utilize section intro slides and/or clear verbal introductions for section and/or topic transitions.

13. Type Size

- It is essential to use a large enough type size (people may be operating on a smaller screen) when presenting virtually on computer monitors. A good rule of thumb is no less than 14 points, 16-18 is better.
- Also consider legibility when sharing documents or diagrams.

14. Keep it Simple

- Avoid unnecessarily complex content, such as video or animations unless you can guarantee it will work flawlessly.

BEST PRACTICES: DELIVERY

15. Vocals

- Vary the pitch, speed, and volume of your voice.
- Smile – participants can hear it, really.
- Consider standing to present, you'll be more energetic, and your voice will be more dynamic.

16. Introductions

- Identify yourself before presenting – establish this as a rule for all participants.
- Start with your Safety Moment, use a topic from the news or relate a personal experience.

17. Authentic Engagement

- Focus on having a conversation, instead of simply presenting; talk with, not at.
- Pause frequently and ask for comments or questions.
- Achieve a personal connection by addressing individuals and using their names.

18. Check in with your Audience

- Ask individuals for feedback and insight.
- Participants can let you know what is working and what is not.
- Try to end with an open question and answer period, if possible.

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