

This free checklist "Online Meetings" is generally applicable/transferable to all online events (meetings, webinars, ...) or communication situations where the partners are not in direct personal contact. (so e.g. for project status meetings).

Basic considerations - sensitization for the changed influencing factors of online meetings

What should we pay attention to!

- Compared to a face-to-face meeting, in an online meeting the perception of the participants is limited; this applies to the moderator as well as to all participants: we often do not see the whole person, but only hear his voice and may only see his face; this requires special attention from the moderator.
- Every meeting needs a moderator; especially online meetings!
- Already in a face-to-face meeting it is important for the moderator; in a virtual meeting it is even more important!
 - Be aware of your own feelings (state of mind); they have a great influence on your behavior.
 - Continuous presence of the moderator is necessary (awareness)
 - Keep eye contact
 - Show empathy -> "use" mirror neurons
 - active listening, deep listening
 - Involve participants, address them personally (by name),
 - observe attentively
 - appreciative
 - give frequent feedback
 - motivate the participants
- Building trust between participants is critical to the success of the event!
- Working on the relationship level has a high influence on the success of the event!
- A high presence of the moderator is necessary.
- Building trust between the participants is critical for the success of the event!
- It makes a significant difference whether you meet a person in person or only "on the screen". From a neuropsychological point of view, a personal encounter with a sympathetic person increases the concentration of the hormone oxytocin in the body. The "bonding hormone" strengthens trust and promotes social bonds, and under certain conditions can have an anxiety- and stress-reducing effect. This reaction is absent or only occurs to a lesser extent in a virtual encounter.
- "A smile can work wonders". Rejecting or even frightening faces "trigger" (via signals to our limbic system) fear and aggressive behavior - smiling causes the opposite!
- In purely auditory communication, the voice plays a major role: accentuation, intonation, volume, speed, ...; analogously, when using image transmission, facial expressions.

- The influence of technical factors is considerably greater than in a face-to-face meeting! The technology used is much more complex and the number of potential disturbances is much higher! Practice using the technology!
- The moderator should be familiar with the software used! (Screen sharing, muting participants, enabling participants, group functions ... possibly switch on recording (obtain permission/consent))

Some notes on technology

- Individual technology/hardware etc.
Each participant should test his/her technology (laptop/PC incl. audio hardware) with sufficient time before the start;
- dial-in to the meeting with sufficient time before the start;
- Everyone should be able to use the technology to the extent that muting and presentation are possible!
- Camera position
Position camera at eye level and aim so that the head is not "cut off"; if you have several cameras, you can change the position - this provides variety.
- Own position
Keep sufficient distance from the camera
- Background
Colored background works better than white background
- Light
Good lighting is important (switch off ceiling light, dimmable battery LED produces good light; if there is nothing like that: switch monitor to "white)
- Sound
External microphone provides good sound (even better are webcams with 2 microphones)
- Network bandwidth
LAN is usually better than WLAN
- Screen resolution
If there are problems with the network bandwidth - reduce screen resolution can be helpful
- System check
"What can go wrong will go wrong" Plan B?!

Preparation checklist

Prepared?	No meeting without preparation!!!
Goals	Specify (verifiable/measurable) goals of the event or meeting
TOC	Derive topics from the goals

Who?	Derive / define / agree on responsible persons / contributors to the topics
Time?	Determine time required for topics
Tool	Microsoft Team, Google Meet, GoToMeeting, jitsi, ..., zoom (which meeting software/provider should be used?)
Media	Determine further media needed; e.g. whiteboard ["flipchart" = tablet with appropriate software (e.g. Microsoft OneNote can convert handwritten notes) for visualization useful]. → take a look at miro or concept board!
Rules	Set meeting rules (consider the context of the tool) Rules can already be sent with the invitation; example: all participants turn on their monitor and camera, the microphone should remain switched off for the time being; all participants have the same entry requirements and general conditions
Invitation	Involve, coordinate and invite necessary participants in time (with link/dial-in data; possibly mobile number for "especially important" participants, ...); with goals and topic incl. planned duration; obtain acceptance/consent; allow sufficient time for feedback on the invitation to remain responsive.
Documents	The required documents are available to all participants.
Breaks?	Depending on the duration, breaks are useful - why not a joint movement break?!

Implementation checklist

Warming up	Open the meeting, take over and "keep" the lead, distribute tasks and involve participants.
Atmosphere	Create atmosphere (smile!), let your charm play - bring in your humor (!no flat jokes!), make meeting possible!
Results	Keep a to-do list and a notebook/topic memory, ... prepare for continuous short protocol
Rules	Address rules
Orientation	Introduce goals and topics; should be permanently accessible during the meeting and briefly shown at the beginning of a (new) topic; can possibly be positioned legibly in the background
Save results	Visualize important work results (whiteboard?)
Process	Make process transparent (visualize)

Moderation	Moderate (keep the red thread, summarize contributions, capture frequent speakers in an appreciative way, ..., watch the time), visualize (e.g. with miro.com)
Diversity	As far as possible collect all meaningful perspectives and points of view
converge	Work out and present possible solutions and options
Decision	Prepare and summarize results/learnings; prepare possible decisions
Summary & outlook	Summarize results - what have we achieved! Outlook: what's next! Ask for feedback from the participants

Follow-up checklist

Protocol	Create and send minutes (incl. notes and additions!)
Decisions	Communicate important decisions and consequences
List of participants	Update list of participants; who also gets the minutes?
to do list	Make updated to do list available to all participants

Success control

The agreements of the meeting should be "tracked" independently by all participants; in practice, however, a small reminder is helpful now and then 😊!

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you can find the German & a print version here: <https://www.qui.de/artikel-beitrag/checkliste-online-meeting/>

#MakeMeetingsWork