Tips for Connecting Virtually
How to Manage Effective Meetings While Working Remotely

How to Engage Team Members Effectively

1) Have everyone turn their video on to create in-person presence
2) Start meetings with personal check-ins to support each other
3) Give everyone the chance to contribute and call on those who haven’t been able to speak
4) Keep meetings brief and relevant!

Create and distribute agenda and materials pre-meeting - these should be concise, clear, and relevant. Platforms like Zoom and Webex allow for screen-sharing so visuals can be displayed in the meeting.

Set expectations at the beginning of the meeting to establish group norms -- such as being present and not on email/phone, speaking without interrupting others, whether or not to have video or to mute unless speaking, and stating name before speaking for clarity. Tip: when scheduling the meeting, select “mute on entry” to minimize distractions.

Be mindful of time as it is a limited resource! Start the meeting on time and distribute notes for those who may come late. End the meeting a few minutes early so people can easily transition to their next meeting. Figure out what items can be sent electronically to make the most of meeting time.

Introduce everyone in the meeting so participants know who is present on the call. Have the facilitator identify themselves as the person moderating discussion -- this will allow one person to manage making sure all participants are able to contribute and all perspectives are heard. Tip: Identify a co-host to monitor the chat so the host can focus on managing the meeting.

Before the meeting ends, spend 5-10 minutes getting clarity and consensus on next steps. Who is doing what, when, and how are they doing it? Make sure work is distributed equitably and that all participants have a role in moving the work forward. Spend time figuring out what deliverables should be completed by the next meeting.

Links to Resources for Working Remotely
8 Tips for Working Remotely
8 Tips for Managing Remote Teams
Tools for Remote Work
Scheduling and managing meetings
Managing audio and video settings
Joining meetings on various devices
Recording meetings
Sharing content
Switching video layout, and more!

When should you use Zoom versus Webex?
Both are user-friendly and easy to set-up. However, Webex is preferred for hosting secure meetings for discussing sensitive information. Note that only Zoom allows you to download meeting recordings.

Planning to Show a Visual?
We recommend creating a powerpoint slideshow containing agenda items and sharing it with meeting participants via the "share content" feature in Zoom and Webex.

This works well when slide content is minimal and information shared is for the purpose of promoting discussion among the meeting participants. Tip: have separate people share the slides and take meeting minutes to minimize distractions.

Tech issues?
Call 919-962-HELP
Click to Live Chat
Click to Request an IT Consultation
www.med.unc.edu/it/

Pro-tip: test your technology pre-meeting!

When Using Handheld Devices
- Before your meeting, download and install the Webex or Zoom app
- Zoom tip: access your UNC account by signing in through SSO and typing "UNC" in the domain address
- Once you join the meeting, access controls by selecting the … button on the bottom of the screen
- Remember to mute your microphone when not speaking and reduce background noise!

When should you use Zoom versus Webex? Check out these Webex best practices from SOM Information Technology!

Questions? Contact us at facultyaffairs@med.unc.edu med.unc.edu/facultyaffairs