Tips for Connecting Virtually

How to Manage Effective Meetings While Working Remotely

1 **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.

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**!

2 **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**.

3 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.

Links to Resources for Working Remotely

8 Tips for Working Remotely

8 Tips for Managing Remote Teams

Tools for Remote Work

4 **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.

5 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.

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Resources to Help You Work Collaboratively & Effectively

Click to View Zoom Video Tutorials

- Joining and managing meetings
- Organizing breakout rooms
- Hosting a webinar, 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**.

Click to View Webex Video Tutorials

- Scheduling and managing meetings
- Managing audio and video settings
- Joining meetings on various devices
- Recording meetings
- Sharing content
- Switching video layout, and more!

Check out these Webex <u>best practices</u> from SOM Information Technology!
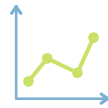
Planning to Show a Visual?

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.**

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!

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!
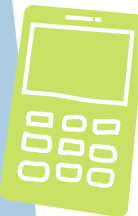
Questions? Contact us at
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