



**guidedinsights**

breakthrough conversations  
for bottom-line results

## Virtual Meeting 1-2-3: Create an engaging, productive virtual meeting experience in 3 easy steps



Interview client team for challenges, areas for improvement



Review past meeting agendas, documentation, prework, online content and other pertinent information



Audit two virtual meetings – summarize observations, provide specific suggestions, deliver report via email and phone after each meeting



Tips guide to help design, plan and lead engaging and productive virtual meetings

1

### Discovery/Assessment – Review and Interviews

- Review meeting goals, sample agendas, documentation, meeting roles, ground rules, technology used and other background information
- Interview client and representative team members to discover challenges, opportunities for improvement, and desired outcomes

2

### Audit Two Virtual Meetings

- Observe two real-life virtual meetings, spaced about 3-4 weeks apart
- Review all pre-meeting documentation and prework as well as meeting notes and resulting action plans

3

### Summary of Observations and Recommendations

- Send summary of observations and specific suggestions to meeting leader after each of two meetings
- Deliver feedback and discuss suggestions via scheduled call within a few days after each meeting
- Provide tips and guidelines that can be applied to this virtual meeting and most others, regardless of type