



Etiquette

for *Effective* and *Enjoyable*
Online Meetings



SocialImpactArchitects



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Shift Happens

Moving from In-Person Meetings to Online Meetings



Similarities

- Role as host – **be welcoming**
- Role as facilitator – **be engaging**
- Role of housekeeper – **be courteous**
- Role of participant – **be professional**

Differences

- Role of IT guru – **be equipped for tech issues**
- Role of diplomat – **be ready for broad range of audiences**

Helpful Tips

Tip #1



Conduct
Orientation
Ahead of Time

- Don't assume that participants understand technology
- Don't assume that they have access or working knowledge of your preferred online meeting platform

Tip #2



Start strong

- Think ahead about your goals for meeting
 - Small group with importance of bonding – start with chit-chat or check-ins on weekend plans/latest recipe
 - Large group on professional topic – ask them to say hello via chat box (name, organization and location) and briefly mention the range of participants
 - Medium group with facilitated conversation – start with a poll
- Consider brief pre-survey during registration to better pinpoint needs and/or interests
- Start with welcome and basic housekeeping items (e.g., breaks, ground rules, tech orientation, agenda)

Helpful Tips

Tip #3



Maintain
an Online
Presence

- Think ahead and dress accordingly
- Pay attention to lighting & background
- Assume you are always being watched/heard

Tip #4



Minimize
Distractions

- Think ahead and use background that fits meeting
- Act as if you are at a meeting – take yourself off visual when doing anything but paying attention

Helpful Tips

Tip #5



Be Focused

- Create an agenda and send ahead of time – with homework/pre-thinking
- Assign roles (e.g., facilitator, notetaker, timekeeper) and involve people in agenda
- Use the screen when possible to illustrate points to ensure visual and verbal comprehension
- Signpost as much as possible, so folks know what is expected and what to prepare for

Tip #6



Add Some Fun

- Be open to adding some fun elements
- Be liberal with breaks – use countdown timer, if needed
- Pause for questions or to read chat box

Tip #7



Take & Give Breaks

Helpful Tips

Tip #8



Facilitate Discussion

- Ask specific questions, such as “What point in the presentation surprised you?” rather than open-ended questions, such as “What did you think?”
- Assign the role or give permission to be a “devil's advocate” to allow people to share their concerns with an idea in a safe way
- Ask people to use their names when commenting (e.g., “Hey, this is Suzy, and I think this point is interesting.”) to help others identify the speaker, especially when many people are in the meeting
- Call on certain people to share their thoughts

Tip #9



End on a High Note

- Recap next steps (including sending slides or recording out), owners and deadlines
- Do brief check-out
- Stay online to answer questions

Questions





For additional info

Social
trendSpotter

Latest Trends in the Social Sector

<https://socialimpactarchitects.com/blog/>

CHECK OUT:

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Suzanne Smith, MBA

Founder & CEO, Social Impact Architects

EDUCATION

- MBA, Duke University's Fuqua School of Business
 - Selected as CASE (Center for the Advancement of Social Entrepreneurship) Scholar
- Adjunct Professor – The University of Texas at Arlington

AWARDS & HONORS

- "Best for the World" Small Business List – B Corp, 2015 to 2019
- TEDx Speaker, "Everyone Can be a Changemaker," 2015
- Huffington Post's Top 10 Social Sector Blog, 2014
- Next Generation Social Entrepreneurs Award, 2010

COMMUNITY LEADER

- **Dallas, Texas** – Library Board, Dallas Commission on Homelessness, Mayor's Task Force on Poverty, Leadership Dallas, Leadership North Texas & Junior League
- Dallas Regional Chamber, Young ATHENA Award, 2014
- Dallas Business Journal's 40 Under 40 Award, 2012
- **Cincinnati, Ohio** – Founder, Flywheel: Social Enterprise Hub