Participant Checklist for Virtual Meetings

Participating in virtual stakeholder meetings opens doors to connect and engage with broader groups more frequently and in a more flexible manner, but it can also pose challenges. To effectively engage and participate in a virtual stakeholder meeting, it is important to plan ahead, ask questions, minimize distractions, be patient with technology, and recognize the potential for misunderstandings.

The information below provides tips and considerations for participating in virtual stakeholder meetings structured around what to consider before, during, and after the meeting.

1. Before the Meeting

Technology:

There are numerous technology platforms that might be used to host a virtual meeting. Each platform has different functionalities, and they are continually evolving with new technological advances. This can make participating in a virtual stakeholder meeting challenging. To minimize technology issues, take the following steps prior to the meeting:

☐ Read any directions and tips provided by the host to ensure your device and internet connection meet system requirements.

☐ Test out the technology in advance:

» Make sure all devices are charged and functioning,

» Consider whether computer or phone audio will provide a better connection, and

» Test out the system to ensure you can join, hear, and interact.

☐ Share any concerns or potential barriers to participation with the organizer and develop solutions prior to the meeting.

☐ Have a backup plan ready in the event that technology issues arise (or ask the organizer if a plan exists). This might mean downloading the app to a tablet or noting the call-in information if the computer audio does not work.

☐ Make note of the contact information for the host or technology support for the meeting.

Meeting Preparation:

To maximize your time during the virtual stakeholder meeting, it is important that you prepare in advance.

☐ Block the meeting on your calendar as protected time to limit any potential conflicts. If possible, include a buffer of at least 15 minutes, before and after, so you do not feel rushed and can ensure you can join on time.

☐ Review the meeting agenda and any meeting materials in advance of the session. Clarify any questions or concerns you might have prior to the event with the host (e.g., meeting agenda does not allow for adequate break time or time to engage in discussion).

☐ If you are representing an organization or larger network, check with colleagues to gain their input to share during the event.

☐ Find a quiet space with limited visual distractions in the background to join the meeting. This can help you fully engage in the meeting, as well as minimize distractions for other participants.

» *Tip: Some platforms (e.g., Zoom) may allow you to use a virtual background. This can help provide a clean background, despite your actual environment, and enhance privacy.*

☐ Request any necessary accommodations prior to the event, including interpreters, captioning, relay services, accessible presentations and handouts, and other supports. For the host to ensure that the meeting is accessible, you will need to ensure they are aware of your needs so they can prepare.

2. During the Meeting

Technology:

Even when you test the system in advance, technology can be unpredictable and can impact your ability to fully engage with the meeting. To limit frustrations:

☐ Be patient — technology may not work as intended. Assume that everyone is doing their best.

☐ Join the meeting about 10–15 minutes in advance to troubleshoot any technology issues.

» *Tip: Joining the meeting early also provides you with time to socialize and build relationships with attendees you might not know well or catch up with those you have a relationship with in a less formal way that will not distract from the meeting.*

☐ Turn off any notifications and close applications (e.g., email, extra browsers) on your computer — they may show up on others' screens, limit your bandwidth, and potentially be unintended distractions.

☐ Use headphones or a headset with a built-in microphone when possible.

Meeting Participation:

It is important that you commit your full attention and engagement to the meeting to represent your perspective and to actively listen to what others share. To ensure everyone feels respected and to minimize misunderstandings:

☐ Use video, as appropriate based on the norms of the meeting and your comfort level, to help others read your body language. Note that, due to bandwidth issues, some meetings may request that video not be used.

☐ Adhere to the virtual meeting norms established by your group.

☐ Mute yourself when you are not talking to minimize background noise.

☐ Be considerate of other participants by balancing your engagement opportunities with allowing other voices to be heard.

☐ Actively listen and wait to share your thoughts and ideas until the current speaker finishes.

☐ Ask for clarification if the sound was not clear, if you want to know who was speaking, or if you were not sure you understood a participant's meaning.

☐ Use the chat box and hand signals to enhance communication.

☐ Take note of areas you are interested in sharing with your network or participants you would like to connect with further after the meeting.

3. After the Meeting

☐ Provide feedback about the process in an effort to encourage continuous improvement. Tell the organizer about technology issues that were particularly frustrating or engagement strategies that worked really well.

☐ Network with other participants after the meeting to extend conversations.

☐ Follow up on any next steps.

☐ Bring information discussed back to your network for additional discussion and feedback.