MANAGE ONLINE MEETINGS

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INTRODUCTION

Technology evolves every day as new tools and forms of communication become available. These evolutions enable us to unite global communities in ways never before imagined. By taking advantage of technological tools, you can share knowledge and dialogue with Toastmasters members, colleagues, or anyone across the world.

Using technology to communicate has a wide range of benefits, including cost savings and efficiency. With the use of new tools, there are choices to be made by every leader and communicator. Selecting the best means of bringing together a group for a meeting—in person, online, via remote connection, or through a webinar or online meeting—falls to the facilitator.

Most Toastmasters members are accustomed to face-to-face communication. This can differ from online meetings or webinars in many ways. Understanding the difference can help you select the best tools and be an effective facilitator.

In this project, you will learn how to effectively conduct online meetings and webinars, prepare and organize necessary visual aids and other supplementary materials, and lead with confidence.

YOUR ASSIGNMENT

Purpose: The purpose of this project is to practice facilitating an online meeting or leading a webinar.

Overview: Conduct a 20- to 25-minute online meeting with fellow Toastmasters or a 20- to 25-minute webinar with visual aids for fellow Toastmasters. You determine the topic of your meeting or webinar. Research and use software that best fits your needs and geographic area. Invite your evaluator to participate in the online meeting or webinar. If you complete your assignment with non-Toastmasters, you must receive approval from the vice president education and invite your evaluator to attend.

Throughout this project you will see icons in the margins next to the text. These icons indicate additional resources available online.

Video: Sign in to Base Camp to watch a video that supports this project.

Interactive Activity: Sign in to Base Camp to complete an interactive activity.

Resource: Sign in to Base Camp to view this resource online.

ASSESS YOUR SKILLS

Evaluate your current skill level by rating each statement.

Select the appropriate number based on your skills today:

5	4	3	2	1
EXEMPLARY	EXCEL	ACCOMPLISHED	EMERGING	DEVELOPING

Pre-Project	Statement	Post-Project
5 4 3 2 1	I know the difference between webinars and online meetings.	5 4 3 2 1
5 4 3 2 1	I have the knowledge to choose online software appropriate for my needs.	5 4 3 2 1
5 4 3 2 1	I am confident that I can create and organize online meetings or webinars.	5 4 3 2 1
5 4 3 2 1	I have the necessary tools and knowledge to prepare any required visual aids or participant-facing material.	5 4 3 2 1
5 4 3 2 1	I am confident that I will successfully manage and mitigate any unforeseen circumstances.	5 4 3 2 1
5 4 3 2 1	I am confident conducting online meetings or webinars.	5 4 3 2 1
5 4 3 2 1	I am comfortable seeking feedback from participants after the online meeting or webinar.	5 4 3 2 1
5 4 3 2 1	I recognize how this project applies to my life outside of Toastmasters.	5 4 3 2 1

COMPETENCIES

The following is a list of competencies that you will learn and practice in this project.

- Facilitate a webinar or online meeting via communication software.

- Interact skillfully with participants attending a webinar or online meeting.

- Adapt to participants' feedback during your webinar or online meeting.

ONLINE COMMUNICATION

Online communication takes many forms and can include webinars, teleconferencing, and online meetings. The focus of this project is on webinars and online meetings, though many of the same suggestions and skills apply to other forms.

WEBINARS

A webinar is a lecture or seminar in an online format. A speaker—or speakers—presents material to an audience. There can be interaction with the audience, but information is primarily being delivered and not exchanged.

A webinar is appropriate for:

- Presenting online education, seminars, or lectures
- Offering outreach or free learning
- Informing the public about a new product or service

ONLINE MEETINGS

Online meetings are intended to be a more collaborative interaction than webinars. They can replace traditional face-to-face meetings when time, cost, and geography make those impractical.

Some reasons for conducting an online meeting include:

- Communicating with individuals who are not able to travel to a shared location

- Collaborating with others on a project

- Holding a status update for a project team

Base the choice of format, either webinar or online meeting, on the content and objectives of your communication.

PRIOR TO YOUR ONLINE MEETING OR WEBINAR

Any kind of presentation or online meeting requires preparation. Begin planning your webinar or online meeting far enough in advance to accomplish all of the tasks necessary to facilitate a successful event.

SELECTING WEB CONFERENCE SOFTWARE

A variety of powerful online communication software is available. Draw from your experience as an attendee at webinars and online meetings to create a list of the features that are important to you. If you have limited experience with online events, talk to friends, colleagues, or do research online to identify the features you want to include on your wish list.

Selecting the best software for your needs will help you run your online event smoothly. As a step in your research, be sure the software you select is compatible with the technology in your geographic area and that it is available to you where you live or work.

Some features to consider as you do your research include the ability to:

- Use chat or other interactive tools.

- Record your webinar for sharing and archiving.

- Notify you if your attendees are being attentive (for example, not visiting other websites) during your meeting or webinar.

Some software companies have tutorials available or hold webinars of their own to outline the features and benefits of their products. Attending an online event is a great way to find out about any available product's functionality from experienced users of the software.

Clarify Your Goals and Objectives

Define goals and objectives for your meeting. Refer back to them during your planning to ensure you accomplish what you planned during your webinar or online meeting.

Pick a Date and Time

When setting a time, consider the needs of your participants (and speakers, if appropriate), and make a note of differing time zones. Ensure your selected date does not conflict with any holidays, work hours, or personal commitments.

Provide Agendas

Create an agenda (a list of items to be discussed) for the meeting. Share with any participants in advance so that they can be familiar with your agenda.

Arrange Resources

Arrange in advance for any meeting software or technology you need for your presentation. Set up links to any additional resource materials.

CREATE AN OUTLINE AND AN AGENDA

Organizing your meeting or webinar will be easier once you develop an agenda or outline. An outline is a general description or plan of what you intend to include in your meeting and the order in which it will be covered. The outline is for the use of the moderator and any presenters; it is not intended to be participant-facing. An agenda is much the same, but it is developed for attendees at your event. You may use the Online Meeting Agenda resource on page 19 to get started.

Your outline or agenda serve as a guide while you present your information. Using an outline helps you sound more natural and conversational. In contrast, reading your presentation word for word may bore your audience.

INVITE PARTICIPANTS

Invite webinar participants via email, a formal online invitation application, or web service. You can also promote a webinar event to the public through social media sites.

Email a reminder to participants the day ahead of your event and again 15 to 30 minutes ahead of the start time. Provide any links or prepared materials, notify participants in advance if they will need to download software in order to attend, and advise them to test the software prior to the webinar or online meeting.

Technology can be unpredictable. Before your presentation, make sure the technology and equipment you need is functional.

Use a hardwired, landline connection whenever possible because it is more reliable than a wireless internet connection. This is especially important in meetings where video will be used. Video requires more resources to transmit than text. A lost connection mid-meeting can seriously impact the success of your event.

Whenever circumstances allow, set up a brief rehearsal with all participating presenters. Check for technical issues, review the agenda, and make certain all of the presenters are prepared.

LEADING ONLINE COMMUNICATION

Facilitating online communication is more efficient with strong leadership. Planning, organizing, excellent time management, and facilitation skills are all required to keep the meeting on schedule.

PRESENTER

A presenter is responsible for creating and delivering engaging, compelling content. If multiple presenters will participate in the online meeting or webinar, select a facilitator to lead the meeting. A facilitator focuses on the logistical and administrative tasks, freeing the presenters to coordinate and deliver high-quality content.

If the hardware is available and your selected software supports a video connection, you may choose to broadcast a live image of your presenters during the webinar. Presenters must be aware of nonverbal communication such as facial expressions and gestures while they are visible. Nonverbal cues can be lost or muted online. It is important for presenters to use clear, distinct, and consistent verbal communication to ensure their message is well-understood.

Presenters are responsible for answering questions and clarifying the information they present. Taking the time to anticipate possible questions or concerns before the webinar or meeting will help you to be prepared when questions arise.

FACILITATOR

A facilitator manages technical issues if they occur, answers written questions from attendees if the software contains a chat window, and manages any other technical or connection issues that arise. The facilitator may also direct questions to multiple speakers if necessary, clarify concerns, and keep the webinar or meeting on schedule. The facilitator needs to have an excellent understanding of the content and the agenda to keep the session moving forward in case it stalls on a single subject or question.

The facilitator position is similar to a facilitator or moderator of a panel discussion.

CONDUCTING THE WEBINAR/MEETING

Start your meeting or webinar by introducing yourself and the others present, including the presenters. If it is necessary or required, mention your qualifications along with those of the other facilitators or presenters.

Smile as you speak. The "sound" of your smile will affect the tone of your voice, making you sound warmer and more welcoming.

Conduct the meeting according to the agenda you have shared with the participants. Refer to your outline as needed for additional personal notes and comments.

Use Visual Aids

You may choose to create visual aids, such as a slideshow, to augment a webinar experience and help your participants follow along.

Create Visual Aids

Let your visual aids enhance, embellish, or illustrate what you say. Be sure to give yourself time to practice your presentation with your visual aids.

Present Effectively

Spend three to four minutes per slide as you present. This amount of time will allow attendees time to view what you have posted and make notes if necessary before you move to the next slide or image.

Explain Content

Explain the purpose of complex graphs, charts, or visual elements before discussing the information they convey. You or your facilitator will need to pay close attention to chat and question panes to make sure you are giving enough context and that attendees have the time they need to digest new information.

Streamline Information

Use between three to five bullets on each slide. Streamlining information on your slides gives your attendees the needed information without drawing their attention away from the spoken portion of your webinar.

Make the Most of Your Time

When using slides as a part of your presentation, fifteen to eighteen is effective for a standard webinar of 60 minutes.

SPECIAL CONSIDERATIONS FOR MEETINGS ONLINE

One of the most important jobs for the facilitator is finding a balance between making time for all contributors and addressing the topics outlined in the agenda. It is easy to lose momentum if the conversation goes awry. When this happens, it can undermine the entire meeting. Be prepared to steer conversations back into a productive mode by adhering to the established agenda.

Before advancing to a new point, provide a summary of the group's opinions, findings, or decisions to bring the purpose of the meeting into focus. Keep it simple—a sentence or two—and then introduce the next steps or topic for discussion.

Follow up on your online meeting or webinar to solidify your message, ensure that any agreed-upon actions are clarified, and prompt the scheduling of another meeting, if required.

To follow up on your meeting:

- Provide any minutes, notes, or agreed-upon action items from the meeting to the participants.

- If appropriate, distribute a recording of the meeting to participants or invitees.

- Solicit feedback about the presenters, content, and online format or software.

- For a more formal response from attendees, create and distribute a survey.

LEADING ONLINE COMMUNICATION

To help you organize and prepare for your online meeting or webinar, use the Online Meeting Basics resource on page 23 to guide you through the different phases of planning and facilitating.

REVIEW AND APPLY

Before you complete the assignment, take a moment to read through the questions you see here. If you are not able to answer them comfortably, review the project.

- List some steps you need to take to prepare for your webinar or online meeting.

- What is the difference between a webinar and an online meeting?

- How can you identify the needs of your audience in an online format?

- What steps will you take to prepare visual aids, if you use them?

- If the web tool you are using or will use is new to you, how will you practice to ensure you are prepared to answer participant questions?

- What are some strategies for handling feedback during your webinar or online meeting?

COMPLETE YOUR ASSIGNMENT
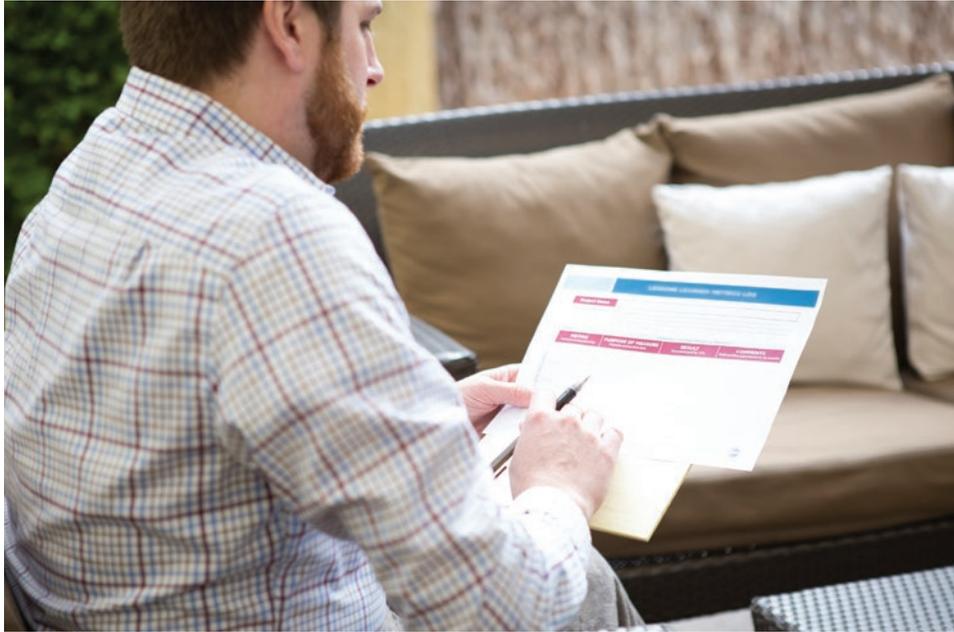
Now that you have read through the project, plan and prepare your speech or report.

Review: Return to page 3 to review your assignment.

Organize: Use the Project Checklist on page 14 to review the steps and add your own. This will help you organize and prepare your assignment.

Schedule: Work with the vice president education to schedule your speech.

Prepare: Prepare for your evaluation. Review the evaluation resources on pages 16–18 and share all resources with your evaluator before your speech. You may choose to share your evaluation resources online.

Purpose: The purpose of this project is to practice facilitating an online meeting or leading a webinar.

Overview: Conduct a 20- to 25-minute online meeting with fellow Toastmasters or a 20- to 25-minute webinar with visual aids for fellow Toastmasters. You determine the topic of your meeting or webinar. Research and use software that best fits your needs and geographic area. Invite your evaluator to participate in the online meeting or webinar. If you complete your assignment with non-Toastmasters, you must receive approval from the vice president education and invite your evaluator to attend.

This project includes:

- The Online Meeting Agenda resource
- The Online Meeting Basics resource
- Planning and conducting a 20- to 25-minute online meeting or webinar

Below are tasks you will need to complete for this project. Please remember, your project is unique to you. You may alter the following list to incorporate any other tasks necessary for your project.

☐ Select a topic for your 20- to 25-minute webinar and determine your audience. With the vice president education's approval, you may conduct the online meeting or webinar with non-Toastmasters or with another club.

☐ Create your webinar.

☐ Design visual aids if you intend to use them.

☐ Schedule your webinar or online meeting and invite your vice president education and evaluator to attend.

☐ Facilitate your online meeting or webinar.

_____

_____

☐ After you have completed all components of the assignment, return to page 4 to rate your skills in the post-project section.

_____

_____

Additional Notes

_____

_____

_____

_____

_____

_____

_____

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_____

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_____

_____

Member Name _____   Date _____

Evaluator _____   **Speech Length:** 20 – 25 minutes

Speech Title

Purpose Statement

The purpose of this project is for the member to practice facilitating an online meeting or leading a webinar.

Notes for the Evaluator

During the completion of this project, the member spent a great deal of time organizing and preparing to facilitate an online meeting or webinar.

About this online meeting or webinar:

- In order to complete this evaluation, you must attend the webinar or online meeting.
- The member will deliver a well-organized meeting or webinar. Depending on the type, the member may facilitate a discussion between others or disseminate information to attendees at the session.
- The member should use excellent facilitation and public speaking skills.

General Comments

You excelled at:

You may want to work on:

To challenge yourself:

For the evaluator: In addition to your verbal evaluation, please complete this form.

5 EXEMPLARY	**4** EXCELS	**3** ACCOMPLISHED	**2** EMERGING	**1** DEVELOPING

Clarity: Spoken language is clear and is easily understood

| 5 | 4 | 3 | 2 | 1 |

Comment:

Vocal Variety: Uses tone, speed, and volume as tools

| 5 | 4 | 3 | 2 | 1 |

Comment:

Eye Contact: Effectively uses eye contact to engage audience

| 5 | 4 | 3 | 2 | 1 |

Comment:

Gestures: Uses physical gestures effectively

| 5 | 4 | 3 | 2 | 1 |

Comment:

Audience Awareness: Demonstrates awareness of audience engagement and needs

| 5 | 4 | 3 | 2 | 1 |

Comment:

Comfort Level: Appears comfortable with the audience

| 5 | 4 | 3 | 2 | 1 |

Comment:

Interest: Engages audience with interesting, well-constructed content

| 5 | 4 | 3 | 2 | 1 |

Comment:

Technology Management: Conducts a well-run meeting or webinar with limited technical issues caused by the member

| 5 | 4 | 3 | 2 | 1 |

Comment:

Organization: Meeting or webinar is well-organized

| 5 | 4 | 3 | 2 | 1 |

Comment:

EVALUATION CRITERIA
Manage Online Meetings

This criteria lists the specific goals and expectations for the speech. Please review each level to help you complete the evaluation.

Clarity

5 – Is an exemplary public speaker who is always understood

4 – Excels at communicating using the spoken word

3 – Spoken language is clear and is easily understood

2 – Spoken language is somewhat unclear or challenging to understand

1 – Spoken language is unclear or not easily understood

Vocal Variety

5 – Uses the tools of tone, speed, and volume to perfection

4 – Excels at using tone, speed, and volume as tools

3 – Uses tone, speed, and volume as tools

2 – Use of tone, speed, and volume requires further practice

1 – Ineffective use of tone, speed, and volume

Eye Contact

5 – Uses eye contact to convey emotion and elicit response

4 – Uses eye contact to gauge audience reaction and response

3 – Effectively uses eye contact to engage audience

2 – Eye contact with audience needs improvement

1 – Makes little or no eye contact with audience

Gestures

5 – Fully integrates physical gestures with content to deliver an exemplary speech

4 – Uses physical gestures as a tool to enhance speech

3 – Uses physical gestures effectively

2 – Uses somewhat distracting or limited gestures

1 – Uses very distracting gestures or no gestures

Audience Awareness

5 – Engages audience completely and anticipates audience needs

4 – Is fully aware of audience engagement/needs and responds effectively

3 – Demonstrates awareness of audience engagement and needs

2 – Audience engagement or awareness of audience requires further practice

1 – Makes little or no attempt to engage audience or meet audience needs

Comfort Level

5 – Appears completely self-assured with the audience

4 – Appears fully at ease with the audience

3 – Appears comfortable with the audience

2 – Appears uncomfortable with the audience

1 – Appears highly uncomfortable with the audience

Interest

5 – Fully engages audience with exemplary, well-constructed content

4 – Engages audience with highly compelling, well-constructed content

3 – Engages audience with interesting, well-constructed content

2 – Content is interesting but not well-constructed or is well-constructed but not interesting

1 – Content is neither interesting nor well-constructed

Technology Management

5 – Conducts an exemplary meeting or webinar with no technical issues caused by the member

4 – Conducts an excellent meeting or webinar with no technical issues caused by the member

3 – Conducts a well-run meeting or webinar with limited technical issues caused by the member

2 – Meeting or webinar is occasionally interrupted by technical issues caused by the member

1 – Meeting or webinar is interrupted by several technical issues caused by the member

Organization

5 – Meeting or webinar is an exemplary example of the use of media and delivery of content

4 – Meeting or webinar is an excellent example of organization

3 – Meeting or webinar is well-organized

2 – Member made an attempt to organize meeting or webinar, but the online event did not run well

1 – Meeting or webinar lacks organization

ONLINE MEETING AGENDA

Use this form to prepare for your online meeting.

Meeting Title	

Date _____   Time _____

Call-in number/login _____

Facilitator _____

Attendees _____

_____

Purpose _____

Objective _____

Resources _____

Preparation

Task	Details

Agenda Items

Item 1	Details
Description	
Presenter	
Time allotted	

Agenda Items

Item 2	Details
Description	
Presenter	
Time allotted	

Agenda Items

Item 3	Details
Description	
Presenter	
Time allotted	

Action Items

Item 1	Details
Description	
Presenter	
Time allotted	

Action Items

Item 2	Details
Description	
Presenter	
Time allotted	

Action Items

Item 3	Details
Description	
Presenter	
Time allotted	

Additional Comments:

ONLINE MEETING BASICS

Review the following information to help you better organize your webinar or online meeting.

Before the online meeting or webinar:

- Schedule the meeting and invite participants.
- Create and send an agenda to all confirmed attendees well in advance of the event.
- Set up your hardware in a quiet space free from distractions.
- Clear your computer desktop of any confidential or inappropriate material.
- Close or log out of any messaging applications.
- Prepare all meeting materials and open them on your computer screen.
- Conduct a practice session to ensure you know how your software and hardware function.

During the online meeting or webinar:

- Introduce yourself to all attendees.
- Be aware of your tone and make an effort to sound engaging and friendly. If you are visible to attendees, be sure to use effective body language.
- Conduct the meeting in accordance with your agenda. Be sure to stay on schedule.
- Support attendees by monitoring chat statuses, emoticons, or other signals that someone has a question or comment.
  - Depending on the size of the meeting, you may ask attendees to introduce themselves before speaking.
- Hold a question-and-answer session if applicable, or provide your contact information so attendees may ask follow-up questions at a later time.
- At the close of the meeting, thank attendees for participating.

After the online meeting or webinar:

- Send the meeting materials to the attendees.
- Distribute a recording of the online meeting if applicable.
- Gather feedback from attendees by creating and sending a survey.

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