

Virtual meeting checklist

As you plan, deliver, and follow up on your virtual meeting, keep this checklist handy to help ensure you are set up for success.



Technology

Test meeting software

- I can log in.
- I can share my screen.
- My microphone and speakers support audio.
- I am comfortable with the software platform (i.e., chat, polling, Q&A, etc.)



Attendees

Invites

- I've identified my target audience.
- I've set a time and duration for my meeting.
- My invitations contain pertinent software and registration links.
- I've crafted an enticing message or incentive to encourage attendance.



Delivery

Before the meeting

- I have the agenda for my meeting.
- I've prepared an engaging presentation (or other visual aid).
- I've gathered all supporting documents, such as white papers¹.
- I have a call-to-action.



Follow-up

After the meeting

- I have collected a list of attendees from the meeting platform.
- I've followed up with a thank you email to my attendees.
- I've emailed my attendees any supporting documents or copies of the presentation.
- I've answered any outstanding questions from the meeting.
- I've distributed any incentives I offered.

1. Be sure to follow the company's advertising guidelines on presentations and social media.

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