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Virtual Meetings: Best Practice and Etiquette

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Virtual Meetings: Best Practices and Etiquette

During the coronavirus pandemic, it has become necessary to meet virtually rather than in person. It is expected that this practice will continue for some time into the future and may prove to be a more beneficial way to carry out some meetings between colleagues based at different settings.

Many people may be working from the home environment, rather than from their main place of work and therefore there is a need to be mindful of confidentiality and professional standards.

The following rules should be followed when attending a meeting via Microsoft Teams, Zoom or other video conferencing tool.

- **Use Microsoft Teams for online meetings**
 - Invite attendees. Use the lobby feature for approved guests only.
 - If recording a meeting, make sure everyone on the call is aware.
- **Zoom may be used for larger groups and conferences.**
 - Do NOT make meetings PUBLIC to avoid unwanted guests.
 - Do NOT share a link to online meetings on unrestricted social media posts or platforms
 - Do NOT share confidential information in online meetings.

1. Before A Meeting - Setting Up Your Audio, Video and Environment

- **Think about your environment**

Many people may be working from home. Ensure your environment is appropriate and that you are in as private a space as possible. If you are in a space shared with others use headphones to ensure confidentiality. A headset with mic will provide optimal audio experience for both you and other meeting attendees. If a headset isn't available and you are in a private space, use your device's built in audio/mic.
- **Ensure you are dressed appropriately**

Attend all virtual meetings as you would attend a face to face meeting. It is not acceptable to be in pyjamas or a state of undress (for example, men being topless, or women being in a bikini top, during the summer months).

- **Avoid sitting with your back to a window or bright light source**
This causes a silhouette appearance where others cannot see you or determine your identity.
- **Think about the background**
Whatever is in the room behind you might not be appropriate for a meeting or could be distracting to others. Cameras pointed up at ceiling fans are also a visual distraction for some attendees. Consider using the 'blur my background' feature in Microsoft Teams.
- **Close doors to avoid unexpected visitors.**
Many people are working in a home environment where others may pass by or inadvertently interrupt.

2. Joining A Meeting

- **Join a few minutes early if possible**
This allows you to make sure everything is working and gives time to make any adjustments.
- **Mute other devices and apps**
Make sure to mute your mobile phone and close any other apps on your computer/laptop that might send distracting notifications.
- **Enter muted**
Enter any meeting with your mic muted and camera off. Others might already be engaged in conversation.
- **Have a moderator or Chair for large meetings**
Consider appointing someone as Chair or moderator for large meetings. This person can help bring forward any chat questions and provide meeting guidelines and reminders.

3. Attending and Participating in a Meeting

- **Keep your mic muted**
Most important: Keep your mic muted unless you need to speak or are leading the meeting. If your audio becomes distracting, anyone in the meeting can mute any attendee. You will need to unmute yourself to begin speaking when needed.

- **Avoid talking over others**

Unlike an in-person meeting, it's sometimes difficult to distinguish between multiple conversations leading to confusion. If you have a question or wish to comment use the 'raise my hand' feature. The Chair or moderator will be able to come to you when appropriate.

- **Be clear, concise**

Speak in a concise and clear manner and tone so that everyone can hear what you are saying.

- **Pause**

Remember to pause occasionally to assure attendees have time to ask questions

- **Camera use**

Using (or not using) your camera is up to you. A limited number of windows will show for attendees of the meeting. These automatically show/hide based on participation. Be sure to pause/turn off your camera if may be distracting to others. Don't walk around with your camera on (mobile device) – It is also distracting.

- **Use chat window**

Consider, especially for large meetings, asking your questions in the chat window. Tag individuals in chat. Tag other attendees (using @userid format) in the chat window when your comment is directed towards a specific attendee to distinguish between a general comment.

- **If you experience connectivity issues**

Due to the increase in the number of people working from home, internet service can sometimes be 'patchy'. If you are experiencing connectivity issues, turning off your camera can help. Using the chat function may help overcome any audio issues.

- **Meeting recording**

All attendees can start a meeting recording. If recording a meeting is appropriate, announce that you will do so and why and confirm there is agreement.

- **Sharing your screen**

Be mindful of what documents you have open on your device when sharing your screen. Ensure any confidential documents are closed down before joining the meeting to avoid inadvertently sharing confidential information.

- **Be aware of who is in the meeting**

In larger meetings, it is often easy to lose track of who is in the meeting as you cannot always see them. Be aware of who is attending and ensure you do not inadvertently share confidential information with the wrong audience.

- **Avoid eating and drinking**

Do not eat and drink during a meeting. This can be distracting to others. A glass of water is acceptable. Under no circumstances should alcohol be consumed during meetings.

- **Do not smoke or vape during meetings**

This would not be acceptable in the workplace and therefore should not happen during a virtual meeting.