Virtual Event Etiquette and Preparation Checklist

Toolkit for Delivering Services Remotely



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**Interchangeable Terminology Key**

Beneficiary …………………………………………………………………………………………… Client

Staff, Volunteers, Counselors ……………………………………………… Team Members

# Overview

This document is a checklist that includes information and etiquette to assist with hosting virtual events such as training and counseling sessions.

# Presenter Talking Points: Housekeeping with Attendees

Talking points for the beginning of events.

* “Welcome! Thanks for coming today and joining on time. Let’s take a quick moment for some housekeeping items before we get started.”
	+ “Everyone has been muted to ensure a good sound quality.”
		- OR
	+ “Please mute your microphone when you’re not speaking to help minimize disruptive sounds.”
* “When the presenter is talking or sharing their screen, please use the chat box if you can’t see or hear.”
* “When it’s time for questions, raise your hand and we will unmute you (or the presenter will inform you to unmute yourself).”
	+ Explain how to find and use the hand icon or reactions in your platform of choice
* “You are welcome to chat your question if your device does not have a microphone or if the microphone is not working.”
* Remind attendees when they are sharing comments in the chat or questions in the Q&A, please maintain a professional and respectful tone, just as they would do in person.

Presenter DOs – Preparation and Public Speaking

* Do plan ahead and be prepared. See the Virtual Event Presenter Template in the toolkit.
* Do be early.
* Do make sure you have a backup person in case you, as the presenter, are disconnected.
* Do check your equipment, technology, and internet connection at least 45 minutes before the start of the presentation.
* Do introductions at the beginning of the presentation so those attending know who you are and the agency and program you are representing. You can also have the attendees introduce themselves, if time permits.
* Do save time for questions at the end, if time permits. You can also collect questions in the chat or in a QA section if needed. Then follow up after the event.
* Do provide contact information for those who need to reach out for further assistance.
* Do have all materials needed for the event easily accessible.
* Do use the mute function during virtual meetings or when you call in to minimize background noise.
* Do spend time with attendees, as needed, before the event to help them with technology and answer any questions.

Presenter DOs – Etiquette

* Do look presentable and professional.
* Do maintain alert body language if you are on camera in a virtual meeting. Look into the camera as much as possible.
* Don’t lay down or slump over while on camera.
* Do behave in virtual meetings as you would if you were in person.
* Do listen to attendees and allow them to finish their thought(s) before speaking. Avoid speaking over them.
* Do be aware of your surroundings. Eliminate distractions.
* Do put a sign on your door so that others in your home or office will know not to interrupt you.
* Do use a neutral or program related background that is not distracting and allows for your clear visibility.
* Do turn on your camera when you are speaking and ask other presenters to do the same.
* Do help attendees maintain a professional and appropriate atmosphere, such as by asking them to mute their computer or phone if they aren’t talking and/or turn off their camera if their background is distracting.
* Do mute individual attendees who are not muting themselves, if necessary. Attendees may forget to mute themselves when they join or after speaking.
* Do turn off the camera of attendees if their camera is distracting or displaying inappropriate backgrounds.

Presenter DON’Ts – Preparation and Public Speaking

* Don’t position your camera too close to your face or at strange angles. Find a flat surface and adjust your laptop, monitor or other recording equipment so it is 12 to 18 inches away. Adjust your work so you face a window or have plenty of light to be seen well.
* Don’t read word by word from your script. You will sound like a robot, and you may lose your audience’s attention.
* Don’t talk too fast and try to finish a 45-minute presentation in a 30-minute time slot.
* Don’t use acronyms without spelling them out and explaining what they mean. Not everyone is familiar with Medicare or other program related abbreviations.
* Don’t let your animals be nearby if they are disruptive with noise and/or activity.

Presenter DON’Ts - Etiquette

* Don’t use cute or unusual photos that do not illustrate what you are talking about. It can distract the audience, and they might not pay attention to what you are saying.
* Don’t sit or stand in front of inappropriate background imagery (e.g., politically charged posters or background imagery with potentially offensive content).
* Don’t sit or stand in front of a very bright light or a window with a lot of light behind it; this can cause discomfort for other participants and make it hard to see you.
* Don’t play music, keep the TV on, or engage in other conversations while on virtual meetings.

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