

Meeting Planning Worksheet

As you plan, use this example worksheet to help you choose which WebEx features and tools are best suited for each phase of your meeting. On the next page you'll find a blank worksheet for you to use.

Meeting objectives Review technical requirements document; set initial timeline for the project

Date March 18, 2010 Time 9:00-10:30 am Host Key 607364 (from Meeting Info page or Host email)

Files, documents, and polls to share Draft requirements document; project schedule; priority poll

Meeting Information

| Agenda Item and Time Estimate | WebEx Tools | Meeting Center Tools |
|---------------------------------------|--|--------------------------|
| 1. Introduce attendees (5 min.) | Poll, chat, audio | Annotation |
| 2. Review requirements (30 min.) | Document sharing, application sharing | Whiteboard |
| 3. Eval/brainstorm diagrams (25 min.) | Whiteboard, annotation tools, chat, audio | Chat |
| 4. Prioritize action items (15 min.) | Annotation tools, notes, poll vote | Raise Hand |
| 5. Summarize and plan (15 min.) | App. sharing, file transfer, follow-up email | Polling |
| | | Notes |
| | | Video |
| | | Sharing options |
| | | • Presentation/ Document |
| | | • Application |
| | | • Web Content |
| | | • Web Browser |
| | | • Desktop |

Participant Tasks and Roles

| Task/role | Name |
|----------------|---------------------------------|
| Alternate host | Frank Stone |
| Presenters | Sharon Little and Mark Kanowitz |
| Note-taker | Justin Lohmeyer |

Contingency plans

| What if . . . | Then . . . |
|---|--|
| 1. Attendees have trouble with their audio connection | Paste instructions for joining audio into a chat message |
| 2. Participants are multi-tasking | Solicit direct feedback on ideas and documents |
| 3. Participants can't log in | Verify that they are using the correct password |

Notes Talk to Frank Stone about being alternate host; ensure that everyone has reviewed the documents; check for missed requirements; end the meeting with a complete list of action items

Meeting Planning Worksheet

Meeting objectives _____

Date _____ Time _____ Host Key _____ (from Meeting Info page or Host email)

Files, documents, and polls to share _____

Meeting Information

| Agenda Item and Time Estimate | WebEx Tools |
|-------------------------------|-------------|
| | |

- Meeting Center Tools**
- Annotation
 - Whiteboard
 - Chat
 - Raise Hand
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 - Notes
 - Video
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Participant Tasks and Roles

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|-----------|------|
| | |

Contingency plans

| What if. . . | Then. . . |
|--------------|-----------|
| | |

Notes

Meeting Checklists

Before the Meeting Date

Organizing the meeting

- Registration requirements are set.
- Invitations have been sent, and responses have been saved.
- Attendee roles and responsibilities have been assigned.
- Attendee privileges and options are configured.
- Documents and presentations to be shared are ready.

Setting up your meeting space

- Headset and webcam work properly.
- A second computer is available as a backup and to log in as an attendee.
- All software is installed correctly.
- An “In a Meeting” sign is handy.

Practicing the meeting

- All material has been reviewed carefully.
- Documents have been launched and tested in a practice meeting.
- Polls display correctly in the Polling panel.

The Day of the Meeting

Before the meeting starts

- Sources of background noise have been minimized.
- The people around you know you’ll be in a meeting.
- The “Meeting in Progress” sign is displayed.
- You have attendee contact information.
- The webcam is positioned and operating correctly.
- The Host Key and the meeting number are easy to access.
- You have started your meeting 15 minutes early.
- You have joined the meeting as an attendee on a second computer.
- Files and applications to be shared are open or ready to open on your desktop.
- The PowerPoint Notes panel is open.
- Attendee privileges and meeting options have been reviewed.
- Computer applications not needed for the meeting are closed.

Beginning the meeting

- Attendees are greeted as they join.
- Reminders are sent to invitees who have not joined on time.
- The agenda and any rules/guidelines are reviewed.
- Verify that the attendees see what you want them to see.

Conducting the meeting

- Interaction is promoted through questions and answers.
- The Chat and Annotation tools are used to solicit input and feedback.
- “Cut-and-paste” instructions or information is available to send to late arrivals in a chat message.
- Time is tracked to keep the meeting on schedule.
- The Chat panel is checked regularly for questions and comments.
- If the meeting is running late, determine what material can be cut and what can be saved for a different time.

Ending the meeting

- Objectives and tasks are reviewed.
- Supplementary documents are made available through File Sharing.
- Meeting documents are saved and distributed using Send Transcript.
- The wrap-up begins before the scheduled completion time.
- Objectives and tasks are reviewed.
- Questions are answered.
- Assignments and tasks are delegated clearly.

After the meeting

- Documents developed or reviewed have been distributed to attendees and to others who were unable to join the meeting.
- Meeting notes and minutes have been distributed.
- Results of polls are shared.
- Meeting evaluations are solicited and reviewed.
- Meeting recording is published and shared.