Virtual Meeting Best Practices

Planning Your Meeting

I. Contact the legislator’s office 3 – 4 weeks prior to when you want to have the virtual meeting
II. Ask them which software program they would prefer to use as there are several options
   a. Zoom
   b. Go To Meetings
   c. Google
III. For virtual meetings, smaller groups are better
   a. Try to keep it to no more than 8 people including the legislator. The goal is to make sure that all of the speakers fit onto one screen.
   b. If you have people attending the meeting that are not speaking, you may have them simply call into the meeting or ask all users to select “Speaker View.”
IV. As with any legislator meeting, those attending should have a strong connection to the legislator’s district.
V. Make sure your agenda is well-planned and stick to it!
   a. Keep your introductions very brief
   b. Assign speaking roles to those in attendance for each issue
   c. Share your agenda with the legislator and their staff a head of time

Preparation for Your Meeting

I. Looking and Sounding Your Best on Camera
   a. Have good lighting
   b. Use a good microphone
   c. Make sure that all other applications on your phone/computer are turned off or on silent
   d. Have a neutral background
      i. Use your credit union branding in the background
         1. Create a virtual background
         2. Have a poster or plaque with your credit union name in your camera shot
      ii. Test your camera, mic, and speakers prior to the meeting to ensure they all work correctly
      iii. Make sure that there is not a lot of ambient/outside noise in the room from where you log in
      iv. Make sure pets, children, spouses, etc. are in separate rooms and occupied so they don’t interrupt.
         1. If you are interrupted, make sure you turn your camera off and put yourself on mute.
II. Check your internet connectivity
a. Disconnect other devices from your wi-fi/internet connection so that all the bandwidth is going towards the virtual meeting
   i. This includes smartphones, additional laptops and tablets, as well as smart televisions
b. In case your home connection fails, have a back-up plan. This can include calling in from a phone or connecting via another device.

III. Find time to have a “dress rehearsal” with most participants in the lawmaker meeting to make sure all the connections and devices work.
   a. Review the agenda and finalize speaking roles during this time

Day of Your Virtual Meeting

I. If you are hosting, log-in to the meeting 10 – 15 minutes early. If you are a participant log-in 5 minutes ahead of the meeting.

II. Make sure that all other applications and alerts on your computer are turned off except for the video conferencing software.

III. Dress the part! Attendees should be in a business or business casual attire.
   a. Polo shirts
   b. Button down shirts with or without a tie
   c. Blouses
   d. Dresses
   e. If you are the host, you may want to be in business attire
   f. Avoid wearing t-shirts, workout shirts, etc.

IV. Relax! Legislators want to hear from you, their constituents about the great work you’re doing for your members in the district