Prezi

Prezi's Meeting Guidebook

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Meetings Guidebook

INTRODUCTION

Virtual meetings are now a mainstay in most workplaces. And yet, we're still seeing many teams make the common mistake of trying to apply in-person meeting best practices to a virtual or hybrid setting.

That's why we created this meeting guidebook: Follow these steps to create the best possible meeting experience for your teams, regardless of whether you're in the office, fully remote, or in a hybrid environment. The goal is to make it so you never leave a meeting thinking, "this could've been an email."

We've already applied this guidebook internally to great effect, and we're positive you'll see significantly more engagement once you take these principles to heart.

To navigate the guide, start with the BEGINNER STEPS . Then, when you're familiar with these best practices, move on to the INTERMEDIATE STEPS , followed by the ADVANCED STEPS for truly exceptional meetings.

But first, we recommend you familiarize yourself with some new norms and habits that every team should be encouraged to follow.

Our new normal

☐ **Normalize people leaving early if the rest of the meeting doesn't apply to them;** encourage leaders to suggest that certain people leave the meeting if not needed

☐ **Normalize prioritization:** If someone is only needed for a certain amount of time, ask them to talk first

☐ **Normalize that not everyone needs to speak up in a meeting to contribute** — chat, on-screen responses, and async work are all very valuable ways to contribute without needing to speak up just for the sake of speaking up

☐ **Normalize that it's okay to do other work if a certain part of the meeting isn't relevant to you;** call out that person's name when they need to be back and focused

☐ **Normalize asking for an agenda** if there isn't one — and normalize responding "NO" to an invite if one isn't added within a reasonable amount of time before the meeting (for most people, this will be 24-48 hours, depending on what your team agrees on)

☐ **Normalize creating async discussions**. Before any meeting, first think about whether your topics should be discussed asnyc or live. If you are uncertain, ask your stakeholders

Before the meeting

↗ **Scheduling**

↗ **Agenda**

↗ **Roles**

↗ **Send out any async work**

🕐 SCHEDULE

☐ **Schedule meetings to end 5 minutes before the half hour or hour to give people a bio break and room to reset before the next call**

☰ AGENDA

☐ **Create a detailed agenda that has no more than 3-4 items for a 30-minute meeting**

↗ Include the agenda in the calendar invite

↗ The agenda should indicate what the **goal** of the meeting is.

> **VAGUE:** "Let's figure out next steps/how to proceed." **vs.**
>
> **IDEAL:** "In this meeting, I'd like us to decide:
> **1.** Who will own X initiative;
> **2.** The deliverables we need to have to complete the project by deadline;
> **3.** Which stakeholders need to be informed;
> **4.** And How often we want to meet and for how long"
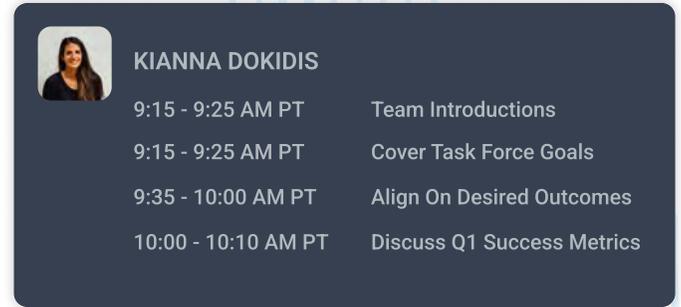
KIANNA DOKIDIS

9:15 - 9:25 AM PT	Team Introductions
9:15 - 9:25 AM PT	Cover Task Force Goals
9:35 - 10:00 AM PT	Align On Desired Outcomes
10:00 - 10:10 AM PT	Discuss Q1 Success Metrics

TIP

Ask yourself: "If we can achieve only one thing in this meeting, what should it be?"

☐ **Indicate how much time should be spent on each item** (even better, indicate what time the clock should read as you move onto the next item so you don't have to do calculations in your head)

☐ **No agenda = no meeting!**

☐ **Set the rules of engagement and add it to the agenda** (e.g., if there are more than 4 people, use the "raise hands" feature)

👤 **ROLES**

☐ **Asynchronously decide** (before the meeting) who is going to take notes about tasks/responsibilities/ deadlines, as well as next steps

  ↗ If there is a recurring meeting, consider rotating the role

Before the meeting

☐ **Decide what type of meeting it is, and add it into the calendar title** (Bonus: Add an emoji to visually indicate the meeting type)

  ↗ Brainstorming: New Prezi Video features

  ↗ ⚽ Kick-off: Hack Week roles and goals

  ↗ 💬 Discussion: Feedback for external partners

  ↗ Training

  ↗ Workshop

  ↗ Lessons learned

  ↗ Feedback

  ↗ Problem solving

  ↗ Personal, etc.

Before the meeting

⟳ SEND OUT ANY ASYNC WORK

☐ **Your meeting is almost always going to be more productive if work is sent out beforehand** (instead of jumping into the meeting trying to figure out next steps)

☐ **When to opt for async vs. live meetings**

   ↗ Ask your stakeholders if they think the meeting will be better async or live

   ↗ Use voting (emojis) for async communication (e.g., which tools they would like to use, **A**: X, **B**: Y)

INTERMEDIATE STEPS

☐ **Once you've decided what type of meeting it is**

   ↗ Next: Think ahead in terms of what collaboration tools to use depending on the meeting type. Ex: Prezi Design, Figjam, Airtable, Google products, Confluence, etc. Make sure everyone is set up to use that tool before the meeting

☐ **Audit your one-off meetings and repeating meetings** — do you really need them? Can you adjust the cadence? The duration? Don't be afraid to test things out and see how they go.

ADVANCED STEPS

☐ **Once you have your agenda with a time breakdown**

   ↗ Next: When a facilitator asks for people to add their agendas, ask them to fill it out at least 12 hours in advance to ensure people are thinking thoughtfully ahead of the meeting. If no one fills out the agenda, the meeting gets canceled

☐ **For weekly team meetings and group bonding meetings**

   ↗ Consider playing music or asking a fun question to connect and create more interesting conversation beyond "How are you?"

   ↗ **You can try...**

> Question of the Week/Day/Month where one person asks a question and everyone pulls their answer up on Prezi Video

> Create a team playlist — choose a song from there each week to play, and ask the person who chose the song to share a bit about why they like the song

> Movie Mondays — Choose one person to share a clip from their favorite movie and have everyone guess

During the meeting

↗ **Starting the meeting**

⚑ STARTING THE MEETING

BEGINNER STEPS

☐ **Start on time** (this means giving people 1 minute to trickle in with any technical issues, but no longer than that). Respect people's time. This will also help meetings end 5 minutes before the half hour or hour

☐ **Meeting setup**

↗ If one person dials in on a video call, everyone should, even when working from the office

↗ If in the office, each person should grab their own meeting rooms, or everyone can sit in a room together with their videos turned on and mics off (use one microphone in the middle of the table to avoid any sound feedback)

INTERMEDIATE STEPS

☐ **Tips for the facilitator**

↗ Record the meeting if crucial stakeholders can't make it

↗ Follow the rules of engagement you've set before the meeting (e.g., everyone use the raise hand feature to speak); remind people at the start of the meeting

↗ Keep an eye on the clock and verbalize to the group when it's time to move to the next agenda item

☐ **After you've already stated the goal of the meeting in the agenda**

↗ Next: State at the start of the meeting what the ideal outcome is to reinforce the goal. One phrase that is super helpful is: "This meeting will be successful if [fill in goal here]."

During the meeting

☐ **You've stated the rules of engagement and are staying on schedule with your agenda**

↗ Next: Call out when people use non-verbal communication to participate

☐ **You've stated the rules of engagement and are staying on schedule with your agenda,** and you're also acknowledging non-verbal communication

↗ Next: Pause longer than feels comfortable (people start getting uncomfortable after 4 seconds — wait longer than that) to give people — especially introverts — a chance to unmute/jump in

↗ Next: Consider using Slido during certain meetings for those who are nervous about asking questions in front of a group

↗ Next: Consider adding a co-facilitator so they can keep track of timing and questions and comments that come through the chat

↗ Next: Practice more positive ways to give feedback and add to the discussion: For example, use "yes, and…" statements instead of "yes, but…"

↗ Next: **Use Polly's meeting feedback survey** in Slack to get immediate feedback on the success of your meeting

After the meeting

↗ **Ending the meeting**

↗ **Closing**

🏁 **ENDING THE MEETING**

☐ **Ending the meeting**

↗ **Do not go over the meeting time** — respect people's time. If a meeting needs to go over, continue the conversation over Slack or set up another meeting

↗ Save 1-2 minutes at the end of the meeting to state action items and next steps, as well as **deadlines** (more on deadlines below)

☐ **Slack**

↗ **Create a temporary Slack channel if there's more than 3 people in the group** (this way it's easy to add more people to the group without losing the past messages); you can mention "temp" in the channel name, too, to indicate it's temporary (Ex: "temp_navbar_experiment")

↗ Each Slack channel should have a topic and the description should link out to any relevant resources

INTERMEDIATE STEPS

☐ **If you've already recorded the call**

↗ **Next:** Share the 'grid' view of the Zoom recording as well as the 'speaker view' so you can see all the live interactions that took place

After the meeting

☐ **You've given deadlines for deliverables**

↗ **Next:** Give specific times so that you aren't left unsure when to check in on that specific day

> **BAD:** Let's all submit our feedback next week
>
> **BETTER:** Let's all submit our feedback by EOD Wednesday
>
> **PERFECT:** Please submit your feedback by 5 pm PT on Wednesday

☐ **Once you have your agenda with a time breakdown**

↗ **Next:** When a facilitator asks for people to add their agendas, ask them to fill it out at least **24-48 hours in advance** to ensure people are thinking thoughtfully ahead of the meeting. If no one fills out the agenda, the meeting gets canceled

☐ **Do a meeting audit**

↗ Revisit the purpose of existing recurring meetings on a regular basis. Always check in with the audience whether the meeting is still relevant

↗ Review your meeting data feedback from Polly, then iterate and improve

⊙ CLOSING

Once you've reached the advanced steps for each section, you should have everything you need to create truly effective hybrid meetings. For insights on how leaders at Slack, Atlassian, Zapier, and many other companies approach hybrid meetings, check out our comprehensive ebook.

And to ensure that you drive next-level engagement and productivity in any meeting, be sure to try Prezi Video.

↗ **About Prezi**

Prezi is the leading virtual presentation and collaboration solution for the digital workplace. Its signature offering, Prezi Video, is helping the majority of the Fortune 1000 to build more productive video meetings by letting participants bring their content with them onto any screen. Founded in 2009, Prezi has offices in San Francisco, Budapest, and Riga, with investors, including Accel, Spectrum Equity and TED conferences. For more information, please visit www.prezi.com.