

Virtual Meeting Preparation

Plan for Success

Purpose

Set a clear purpose for the meeting. This will help guide your meeting planning and promotion.

Example

The goal of this meeting is to get members connected, brainstorm ideas, and get each member moving forward with their next step.

Priorities

Determine your priorities for the meeting based on your purpose.

Example

- Give them a small group setting to meet each other
- Prompt them to discuss their challenges
- Make sure they leave knowing their next step

Plan

Create a plan based on the above. Having a detailed plan for your virtual meeting is essential for it to be successful. You'll need to be regularly communicating with attendees so they know what to expect while also managing the meeting controls. Having a detailed process also means that anyone can run the meeting in your absence.

Practice

You want to make sure to practice what you have planned. This ensures that the technology is working properly and that you have allotted the necessary time for each section of the meeting.

Setting Up Your Meeting

Using Zoom Meeting

Choose Plan

FREE - \$0 /month

Up to 100 participants

40 minute group meeting limit

Breakout sessions (50 room & 100 participant limit)

Screenshare

Private and group chat

Local recording

PRO - \$14.99 /month /host

Up to 100 participants (\$64.99 to increase to 500)

24 hour group meeting limit

Breakout sessions (50 room & 200 participant limit)

Screenshare

Private and group chat

Cloud Recording

Account Settings

Personal

- Profile
 - Photo
 - Date & Time
- Settings (default)
 - Meeting
 - Join before host
 - Password

- Mute upon entry
- Chat
- Play Sound
- Screenshare
- Breakout Rooms (ON)
- Waiting Room
- Allow Streaming
- Notifications
- Recording
 - Active Speaker with Share
 - Audio Only
 - Save Chat
 - Automatic Recording
- Telephone
 - International Numbers

Meeting Setup

Meeting - Schedule a New Meeting

- When
 - Set timezone and date/time or recurring.
 - You can set recurring with no particular time and use the link over and over.
- Registration
 - Require if you want to pre-set the breakout rooms or there's limited spots
- Password
 - You can have the link include this or not. We don't use one.
- Video
 - Host & participant on
- Meeting Options
 - Join before host only if the link isn't used for anything else.
 - Mute participants upon entry
 - Enable waiting room

- Record automatically (cloud if you want a quick link to share)
- Invitation
 - Copy the invitation or just use the link
- Save as template
 - Make this a template to use in the future

Quick Meeting Tips

- Have a co-host whenever possible
- Turn off enter/exit chime to avoid the 'ding' sound
- You can lock the meeting from new people joining
- You can mute/unmute individuals or everyone
- You can pause recording or stop and restart to create a new recording file
- You can add polls in advance
- Participants can raise their hand by clicking participants than the raise hand option
- You can share your screen, use a whiteboard, and even annotate it while sharing
 - When you share screen your controls can be found by clicking the video camera in the top toolbar

After Meeting

- Cloud recording
 - You can link to the audio, chat, and video or just video
 - You can adjust when the video starts
 - There are two links - one for you and one for viewers
 - You can download the files
- Local Recording
 - They will download to a Zoom folder on your computer
 - You will see the folder in a pop up once you end the meeting

Brainstorm Breakout Sessions

Our Step-by-Step Process

The goals of these Breakouts are to get members connected, brainstorm ideas, and get each member moving forward with their next step. We use the Zoom breakout feature to group members together in a breakout room within Zoom, so they can collaborate with one another in a small group setting.

Agenda

What you need to do when you need to do it.

- 2:50** Join - Make sure your video and audio is working. Double check your settings. Check emails and social posts for any issues with access.
- 3:00** Welcome - Turn off enter/exit chime. Invite everyone in from the waiting room and close the waiting room. Start the conversation while you wait on everyone to join. Ask questions that they can give a quick answer to.. Ex: Who is launching this month? Who has never done one of these before?
- 3:05** Go over any announcement and then go into the purpose, how this works, and any other specifics they need to know.
- 3:15** Break them out into rooms of 4-5. Then lock the meeting so new people can't join the meeting.
- 3:15- 3:50** Prompt them through the 3 discussion questions. Make sure to set your timer to remind you to send out the prompt. We send the prompt through the breakout room announcement feature and within the chat.

- 3:50** Close the rooms. They will get a 60-second warning depending on your settings..
Record as they share takeaways at the end.

Breakout Session Steps, Scripts, & Prompts

Everything you need to know to make your Breakout Sessions successful.

Start

- Turn off enter/exit chime
- Admit all into the room when you're ready.
- Turn off the waiting room once you start the meeting.
- Greet everyone

Discuss:

- You all are awesome! Make sure you're celebrating your progress, even the little wins. Each baby step adds up and eventually you look back and you've conquered the mountain.
- **Announcements (List them here with links for easy access)**
 - Book your Progress Coaching Call ([link](#))
 - Next Brainstorm Session is X
 - Releasing new X
- **Purpose:**
 - Make face to face connections
 - Get and give ideas, but ultimately choose 1 way to implement what you need to implement right now.
- **How This Works:**
 - We will break you out into groups

- Mic on; ideally camera on too
- Mic in bottom left on desktop, swipe right on your phone..

- **Success Tips:**

- Don't leave. If you do, you can't get back in because we have to lock the meeting.
- Take a screenshot of your group so you can find them after and hold each other accountable
- Grab your phone and have a timekeeper for the group
- Keep your question tight and clear. Receive the feedback with a "thank you for the idea" instead of discussing so you can hear from as many people as possible.
 - Keep your feedback tight
 - Can connect after the call to continue the conversation
 - Make sure everybody has a chance to give and get feedback
- Everyone has something of value to offer, no matter your membership site experience
 - Just one idea can lead to a breakthrough that helps you overcome that roadblock

- **Examples of our Questions:**

- Who are you, where are you from, who do you serve, and what stage are you in? (1/5 mins)
 - EX: I'm Shana Bresnahan from Nashville, TN. I help online business owners cultivate a thriving community that leads to more conversions and increased retention.. I do this through a 2-day in-person workshop. I'm still working on my membership concept. I'm in Stage 2 - building your list.
- Thinking about your 90 days plan or current milestone in the success path, what is one challenge you're facing right now that you want help with or solution that you want feedback on? What's holding you back? (5/25 mins)
 - This is where you want feedback from the group and to figure out how you can support one another.
 - EX: I'm struggling to decide on a list builder. I want feedback on my positioning statement. I am looking for FB live topics for my launch.
- What's the one action you're going to take this week to make progress in your business by when? (1/5 mins)

- Come back share takeaways

Break Them Out

- Groups of 4 to 5
- Tell them how to find the box and click join or automatically send them into group
- Tell them to look for prompts at the top of the screen and the chat
- Break out and lock the meeting
- Note: If you are broadcasting live or recording, it will not record breakouts. It will only record what's happening in the main room. So mute yourself, turn off your video, and stop/pause recording during breakout sessions.

Prompts (Have these ready to copy and paste. There is a character limit.)

- Who are you, where are you from, who do you serve, and what stage are you in? (1 min each/5 min total)
- What's your current focus? What's one challenge you're facing or something you want feedback on? (5/25 min)
- What's the 1 action you'll take this week to move your business forward? (1 min/5 total)

Wrap Up

- Close with 1 minute countdown (click Close Groups)
- Ask how was it and chat while people are coming back
- Take group screenshot pic of as many as possible
- Ask for takeaways and action steps
 - Use the Zoom raise hand feature. Tell them how to raise their hand (under Participants)
 - Unmute participant (tell them you'll handle this.)
 - When done speaking, mute, and then lower hand
 - If you lower hand first you'll have to scroll to find them to unmute them.
- Thank them

- Post a link in the chat to a post in the community where they can tag their breakout group members and share their feedback/action items
- End meeting
- Implement your plan for the recording