

Planning Helper **SAMPLE**

Set of Virtual Meeting Checklists

A. Online Meetings – B. Educational Webinars – C. Training Webinars – D. Webcasts
E. Standard Videoconferencing – F. TelePresence Videoconferencing – G. Satellite Broadcasting

Name of Function or Event

Day / Date / Year – Location of Hotel or Lodging Venue

Advance Procedures for All Virtual Meeting Types

[Understanding Bandwidth-WiFi made easy for meeting and event planners. It's a need-to-know!](#)

- | | |
|--|---|
| <input type="checkbox"/> Service providers for meeting type researched | <input type="checkbox"/> Service provider and/or meeting package selected |
| <input type="checkbox"/> Virtual meeting packages researched | <input type="checkbox"/> Agreements reviewed signed by authorized officer |
| <input type="checkbox"/> Upload / download bandwidth capabilities verified | <input type="checkbox"/> All participants and bidders notified of decision |
| <input type="checkbox"/> Comparison spreadsheet completed for review | <input type="checkbox"/> Service providers scheduled for early consultation |
| <input type="checkbox"/> Budget forecast submitted and approved | <input type="checkbox"/> Save-the-Date announcement prepared |
| <input type="checkbox"/> Party responsible for payment verified in advance | <input type="checkbox"/> |

A. Online Meetings

ONLINE MEETING - ADVANCE PREPARATION

- E-vite distributed (time zone specified)
- Number of participants confirmed
- Online meeting room availability confirmed
- Type of collaboration determined and arranged
- Online tech support confirmed (if preferred)
- Conference room reserved for facilitator(s)
- Agenda | access code sent with confirmations
- Instructions | system requirements sent to all parties
- Meeting materials distributed | uploaded day before
- Connection and features tested one hour in advance
- Facilitator(s) room ready 30 minutes in advance
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ONLINE MEETING IN PROGRESS

- Verify all participants connected
- Announce who is on the call
- Remind participants to mute any background noise
- Remind everyone to give their name before speaking
- Ask that questions be directed to individuals by name
- Turn meeting over to presenter
- Advise all parties if unexpected guests drop in
- Troubleshoot for duration if no tech support
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NEXT PAGE – Educational Webinars

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| <input type="checkbox"/> Virtual meeting packages researched | <input type="checkbox"/> Agreements reviewed signed by authorized officer |
| <input type="checkbox"/> Upload / download bandwidth capabilities verified | <input type="checkbox"/> All participants and bidders notified of decision |
| <input type="checkbox"/> Comparison spreadsheet completed for review | <input type="checkbox"/> Service providers scheduled for early consultation |
| <input type="checkbox"/> Budget forecast submitted and approved | <input type="checkbox"/> Save-the-Date announcement prepared |
| <input type="checkbox"/> Party responsible for payment verified in advance | <input type="checkbox"/> |

B. Educational Webinars for Registered Guests

- | | |
|---|--|
| <input type="checkbox"/> Facilitator confirmed (date, time, time zone) | <input type="checkbox"/> Connection and features tested two hours in advance |
| <input type="checkbox"/> Moderator confirmed to introduce question close | <input type="checkbox"/> Facilitator(s) room ready 30 minutes in advance |
| <input type="checkbox"/> Online meeting room reserved and confirmed | <input type="checkbox"/> Facilitator or moderator closes session |
| <input type="checkbox"/> Facilitator(s) presentation room reserved | <input type="checkbox"/> Follow-up for on-demand viewing set up and tested |
| <input type="checkbox"/> Type of presentation determined | <input type="checkbox"/> Survey or evaluations processed and documented |
| <input type="checkbox"/> Recording for on-demand viewing arranged | <input type="checkbox"/> Adjustments made per feedback from participants |
| <input type="checkbox"/> Preferred audience management features arranged | <input type="checkbox"/> |
| <input type="checkbox"/> Online tech support confirmed (if desired) | <input type="checkbox"/> |
| <input type="checkbox"/> Staff confirmed to troubleshoot if no tech support | <input type="checkbox"/> |
| <input type="checkbox"/> Registration method confirmed and tested | <input type="checkbox"/> |
| <input type="checkbox"/> Payment methods approved and tested | <input type="checkbox"/> |
| <input type="checkbox"/> Reservation cutoff date determined | <input type="checkbox"/> |
| <input type="checkbox"/> Registration management staff assigned | <input type="checkbox"/> |
| <input type="checkbox"/> Online invitation system requirements distributed | <input type="checkbox"/> |
| <input type="checkbox"/> Auto-send of confirmation and instructions tested | <input type="checkbox"/> |
| <input type="checkbox"/> Reminder emails scheduled for staggered distribution | <input type="checkbox"/> |
| <input type="checkbox"/> Presentation materials uploaded day in advance | <input type="checkbox"/> |

NEXT PAGE – Training Webinars

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Advance Procedures for All Virtual Meeting Types

- | | |
|--|---|
| <input type="checkbox"/> Service providers for meeting type researched | <input type="checkbox"/> Service provider and/or meeting package selected |
| <input type="checkbox"/> Virtual meeting packages researched | <input type="checkbox"/> Agreements reviewed signed by authorized officer |
| <input type="checkbox"/> Upload / download bandwidth capabilities verified | <input type="checkbox"/> All participants and bidders notified of decision |
| <input type="checkbox"/> Comparison spreadsheet completed for review | <input type="checkbox"/> Service providers scheduled for early consultation |
| <input type="checkbox"/> Budget forecast submitted and approved | <input type="checkbox"/> Save-the-Date announcement prepared |
| <input type="checkbox"/> Party responsible for payment verified in advance | <input type="checkbox"/> |

C. Training Webinars for Registered Guests

- | | |
|---|--|
| <input type="checkbox"/> Training sessions calendared (date, time, time zone) | <input type="checkbox"/> Connection and features tested two hours in advance |
| <input type="checkbox"/> Instructor(s) confirmed | <input type="checkbox"/> Instructor(s) room ready 30 minutes in advance |
| <input type="checkbox"/> Online meeting room reserved and confirmed | <input type="checkbox"/> Audience response system coordinator ready |
| <input type="checkbox"/> Instructor(s) production room reserved | <input type="checkbox"/> Instructor opens and closes session |
| <input type="checkbox"/> Preferred collaboration methods arranged | <input type="checkbox"/> Follow-up for on-demand viewing set up and tested |
| <input type="checkbox"/> Recording for on-demand viewing arranged | <input type="checkbox"/> Survey or evaluations processed and documented |
| <input type="checkbox"/> Preferred audience management features arranged | <input type="checkbox"/> Adjustments made per feedback from participants |
| <input type="checkbox"/> Online tech support confirmed (if desired) | <input type="checkbox"/> |
| <input type="checkbox"/> Staff confirmed to troubleshoot if no tech support | <input type="checkbox"/> |
| <input type="checkbox"/> Registration method confirmed and tested | <input type="checkbox"/> |
| <input type="checkbox"/> Payment methods approved and tested | <input type="checkbox"/> |
| <input type="checkbox"/> Reservation cutoff date determined | <input type="checkbox"/> |
| <input type="checkbox"/> Registration management staff assigned | <input type="checkbox"/> |
| <input type="checkbox"/> Online invitation system requirements distributed | <input type="checkbox"/> |
| <input type="checkbox"/> Auto-send of confirmation and instructions tested | <input type="checkbox"/> |
| <input type="checkbox"/> Reminder emails scheduled for staggered distribution | <input type="checkbox"/> |
| <input type="checkbox"/> Training materials uploaded day in advance | <input type="checkbox"/> |

NEXT PAGE - Webcasts

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- | | |
|--|---|
| <input type="checkbox"/> Service providers for meeting type researched | <input type="checkbox"/> Service provider and/or meeting package selected |
| <input type="checkbox"/> Virtual meeting packages researched | <input type="checkbox"/> Agreements reviewed signed by authorized officer |
| <input type="checkbox"/> Upload / download bandwidth capabilities verified | <input type="checkbox"/> All participants and bidders notified of decision |
| <input type="checkbox"/> Comparison spreadsheet completed for review | <input type="checkbox"/> Service providers scheduled for early consultation |
| <input type="checkbox"/> Budget forecast submitted and approved | <input type="checkbox"/> Save-the-Date announcement prepared |
| <input type="checkbox"/> Party responsible for payment verified in advance | <input type="checkbox"/> |

D. Webcasts for Registered Viewers

- | | |
|---|--|
| <input type="checkbox"/> Date, time and time zone confirmed | <input type="checkbox"/> Registration management staff assigned |
| <input type="checkbox"/> Instructors, presenters and/or performers confirmed | <input type="checkbox"/> Evaluation feedback method decided arranged |
| <input type="checkbox"/> Media streaming ¹ needs outlined and approved | <input type="checkbox"/> Trial run of all systems and features completed |
| <input type="checkbox"/> Number and location of remote group sites approved | <input type="checkbox"/> Invitation distributed by e-blast |
| <input type="checkbox"/> Venue sites researched for live and remote groups | <input type="checkbox"/> System requirements for individual viewers included |
| <input type="checkbox"/> Venue site inspections scheduled ² | <input type="checkbox"/> Confirmation, instructions, access codes distributed |
| <input type="checkbox"/> Audio visual partner consulted before sites decided | <input type="checkbox"/> Reminder emails scheduled for staggered distribution |
| <input type="checkbox"/> Adequate high-speed Internet access verified at all | <input type="checkbox"/> Presentation materials uploaded day in advance |
| <input type="checkbox"/> Venue contracts signed by authorized officer | <input type="checkbox"/> Audio visual set up completed two hours in advance |
| <input type="checkbox"/> Audio visual contracts signed by authorized officer | <input type="checkbox"/> All systems, equipment and presentations tested |
| <input type="checkbox"/> AV site inspect checklist for live conference site ready | <input type="checkbox"/> Presenter(s) briefed and prepped by AV technician |
| <input type="checkbox"/> AV walk-through of live production site conducted | <input type="checkbox"/> Facilitator or moderator starts session |
| <input type="checkbox"/> Coordinators for each remote site confirmed | <input type="checkbox"/> Tech support monitors throughout session |
| <input type="checkbox"/> Tech support for each site confirmed | <input type="checkbox"/> Facilitator or moderator ends session |
| <input type="checkbox"/> Fact and instruction sheets ready | <input type="checkbox"/> Evaluation reports processed and distributed |
| <input type="checkbox"/> Invitation and recipient database ready | <input type="checkbox"/> On-demand viewing setup, tested, released |
| <input type="checkbox"/> Registration confirmation methods set up | <input type="checkbox"/> ¹ Video, sound, data transfer over the Internet |
| <input type="checkbox"/> Registration payment options set up | <input type="checkbox"/> ² See PlanningHelper.com Topic “Site Selection” |
| <input type="checkbox"/> Reservation cutoff date determined | |

NEXT PAGE – Videoconferencing - Standard

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Advance Procedures for All Virtual Meeting Types

- | | |
|--|---|
| <input type="checkbox"/> Service providers for meeting type researched | <input type="checkbox"/> Service provider and/or meeting package selected |
| <input type="checkbox"/> Virtual meeting packages researched | <input type="checkbox"/> Agreements reviewed signed by authorized officer |
| <input type="checkbox"/> Upload / download bandwidth capabilities verified | <input type="checkbox"/> All participants and bidders notified of decision |
| <input type="checkbox"/> Comparison spreadsheet completed for review | <input type="checkbox"/> Service providers scheduled for early consultation |
| <input type="checkbox"/> Budget forecast submitted and approved | <input type="checkbox"/> Save-the-Date announcement prepared |
| <input type="checkbox"/> Party responsible for payment verified in advance | <input type="checkbox"/> |

E. Videoconferencing – Standard

VIDEOCONFERENCE PREPARATION

- Set of optional dates for conference decided
- Availability of Videoconferencing rooms verified
- Adequate high-speed bandwidth verified at all sites*
- Multi-point bridge verified for multiple sites
- Videoconferencing console or equipment verified
- Audio visual tech support scheduled for all sites
- Number of participants at each site confirmed
- Videoconferencing rooms at all locations reserved
- All parties advised of date, time, time zone
- Room set up instructions distributed to each site
- Contact info, instructions and tips to participants
- Meeting objectives and agenda distributed
- Materials, hand-outs distributed and/or uploaded
- Refreshments ordered
- Details confirmed with all site facilitators day before
- Cameras, speakers, monitors tested day in advance

* Internet or hard-wired Wide Area Network (WAN)

VIDEOCONFERENCE IN PROGRESS

- Test connection with all sites 30 minutes in advance
- Introduce participants and facilitators at each site
- Explain camera, microphone, monitor components
- Remind participants of Videoconference etiquette
- Turn meeting over to presenter | monitor throughout
- Monitor Videoconference throughout
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NEXT PAGE – Videoconferencing - TelePresence

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- | | |
|--|---|
| <input type="checkbox"/> Service providers for meeting type researched | <input type="checkbox"/> Service provider and/or meeting package selected |
| <input type="checkbox"/> Virtual meeting packages researched | <input type="checkbox"/> Agreements reviewed signed by authorized officer |
| <input type="checkbox"/> Upload / download bandwidth capabilities verified | <input type="checkbox"/> All participants and bidders notified of decision |
| <input type="checkbox"/> Comparison spreadsheet completed for review | <input type="checkbox"/> Service providers scheduled for early consultation |
| <input type="checkbox"/> Budget forecast submitted and approved | <input type="checkbox"/> Save-the-Date announcement prepared |
| <input type="checkbox"/> Party responsible for payment verified in advance | <input type="checkbox"/> |

F. Videoconferencing – TelePresence

Advance Preparation

- Set of optional dates for conference decided
- TelePresence rooms verified available at both sites
- Number of participants at each site confirmed
- TelePresence rooms reserved at both sites
- All parties advised of date, time, time zone
- Billing and payment procedures confirmed
- Contracts reviewed and signed by authorized officer
- TelePresence orientation for staff scheduled
- Audio visual and tech support verified with package
- Contact info and instructions sent to all participating
- Meeting objectives and agenda distributed
- Materials, hand-outs distributed and/or uploaded
- Refreshments ordered
- Details confirmed with each facilitator 2 days before
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On-Site

- Introduce participants and facilitators at each site
- Explain camera, microphone, monitor components
- Remind participants of Videoconference etiquette
- Turn meeting over to presenter | monitor throughout
- Monitor Videoconference throughout
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NEXT PAGE – Satellite Broadcasting

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- | | |
|--|---|
| <input type="checkbox"/> Service providers for meeting type researched | <input type="checkbox"/> Service provider and/or meeting package selected |
| <input type="checkbox"/> Virtual meeting packages researched | <input type="checkbox"/> Agreements reviewed signed by authorized officer |
| <input type="checkbox"/> Upload / download bandwidth capabilities verified | <input type="checkbox"/> All participants and bidders notified of decision |
| <input type="checkbox"/> Comparison spreadsheet completed for review | <input type="checkbox"/> Service providers scheduled for early consultation |
| <input type="checkbox"/> Budget forecast submitted and approved | <input type="checkbox"/> Save-the-Date announcement prepared |
| <input type="checkbox"/> Party responsible for payment verified in advance | <input type="checkbox"/> |

G. Satellite Broadcast for Registered Viewers

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|---|---|
| <input type="checkbox"/> Satellite time and production site availability verified | <input type="checkbox"/> Reservation cutoff date determined |
| <input type="checkbox"/> Instructors, presenters and/or performers confirmed | <input type="checkbox"/> Registration management staff assigned |
| <input type="checkbox"/> Media streaming ¹ needs outlined and approved | <input type="checkbox"/> Evaluation feedback method decided arranged |
| <input type="checkbox"/> Number and location of receiving sites approved | <input type="checkbox"/> Trial run of all systems and features completed |
| <input type="checkbox"/> Venues researched for remote group participation | <input type="checkbox"/> Invitation distributed giving date, time, time zone |
| <input type="checkbox"/> Venue site inspections scheduled ² | <input type="checkbox"/> System requirements for individual viewers included |
| <input type="checkbox"/> Audio visual partner consulted before sites decided | <input type="checkbox"/> Confirmation, instructions, access codes distributed |
| <input type="checkbox"/> Satellite dish access verified at all receiving sites | <input type="checkbox"/> Reminder emails scheduled for staggered distribution |
| <input type="checkbox"/> Adequate high-speed cable verified at all sites | <input type="checkbox"/> Presentation materials uploaded day in advance |
| <input type="checkbox"/> Venue contracts signed by authorized officer | <input type="checkbox"/> Audio visual set up completed two hours in advance |
| <input type="checkbox"/> Audio visual contracts signed by authorized officer | <input type="checkbox"/> All systems, equipment and presentations tested |
| <input type="checkbox"/> AV site inspect checklist for live conference site ready | <input type="checkbox"/> Presenter(s) briefed and prepped by AV technician |
| <input type="checkbox"/> AV walk-through of live production site conducted | <input type="checkbox"/> Facilitator or moderator starts session |
| <input type="checkbox"/> Coordinators for each remote site confirmed | <input type="checkbox"/> Tech support monitors throughout session |
| <input type="checkbox"/> Tech support for each site confirmed | <input type="checkbox"/> Facilitator or moderator ends session |
| <input type="checkbox"/> Fact and instruction sheets ready | <input type="checkbox"/> Evaluation reports processed and distributed |
| <input type="checkbox"/> Invitation and recipient database ready | <input type="checkbox"/> On-demand viewing set up, tested, released |
| <input type="checkbox"/> Registration confirmation methods set up | |
| <input type="checkbox"/> Registration payment options set up | |

¹ Video, sound, data transfer

² See PlanningHelper.com Topic **“Site Selection”**

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H. Wrap-Up After Virtual Meeting

- Thank you letters to presenters and service providers
- Include specifics of exceptional service | personnel
- Email “thanks/promo” broadcast to real-time viewers
- Email broadcast announcing on-demand availability
- Record number of advance reservations
- Record number of cancellations
- Record actual attendance
- Review and process undisputed invoice promptly
- Resolve disputed charges within 30 days
- Critique what went well or didn’t
- Analyze evaluations and feedback
- Compile report of final results and distribute
- Results reviewed and changes recommended
- Approved changes for future events documented
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- END -