

Tips for using virtual and video conferencing tools

Video conferencing and other virtual tools may require some preparation and practice to use effectively. Use the following tips to make the most out of engaging with your participants in a virtual setting.

Check the features on your video conferencing application

Some video conferencing applications may already include some of the interactive tools presented above. It is a good idea **be familiar with all the features that are available in the application that you are already using** so that you limit the number of different tools you and your participants need to access.

The **chat box function** in your video conferencing application is great for:

- **Sharing links** to online resources
- **Group discussions** where everyone can respond at the same time
- **Providing another engagement option** for those who do not feel comfortable giving verbal responses
- Allowing participants to **ask questions without interrupting the speaker**

Use the **screen sharing function** for:

- **Showing a presentation**
- **Sharing a resource** with participants and explaining the information verbally at the same time

Consider the **record function** for:

- **Saving portions of presentations** for your participants to refer to later

Do not record any meetings if this is against the guidelines of your organization, if you do not have expressed permission from participants, or if it imposes on participant privacy.

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Prepare your participants to use the tools successfully

View the tips below for **preparing for your first meeting** and **establishing guidelines** for the session.

Dedicate some time before or during your first meeting for a technology session with participants:

- **Test the applications** you will use ahead of time
- **Inform participants which applications you will use** for the session and walk through the applications and features with them
- **Address any tech support needs and questions**
- **Have a backup plan** in case an application or tool you were planning to use does not work

Establish guidelines for the session

and share these with your participants before you begin. Some examples of items to cover are:

- **The meeting objectives and agenda**, including timing of breaks where applicable
- **What participants should do if they cannot attend** or will miss part of a session
- **When and how to ask questions to the facilitator** (for example, if they are free to interrupt, if they should use the chat box or wait until the end of the session)
- **Whether they will be muted** during parts of the session in order to minimize disruptions or audio issues
- **Any other meeting etiquette or ground rules**

Additional considerations

Consider the ease of use and accessibility features of any applications you decide to use. Test any tools, perhaps with a group of colleagues, before sharing with participants. Also be sure to follow the recommendations and privacy and security guidelines set by your organization or governing body.