THE CLEARING®

Preparing + Delivering
Your Remote Session

Prep Your Tech

This checklist will help you take the first steps to
ensure an impactful and engaging experience for
both participants and facilitators of remote sessions.

Prep Your Tech

Full Technology Checklist

Audience: Facilitator + Participant

Assign a dedicated person to troubleshoot and monitor

> **Share this person's phone and email** to help with meeting snafus

Assign a remote participant-focused facilitator This person will focus on integrating remote participants into the conversation via tools (e.g., Zoom, GoTo, Webex, etc.) and available features (e.g., raise hand, chat)

Test mics and features

Turn off all non-meeting windows/screens and distractions (e.g., anything you don't want other people seeing)

Facilitator and other presenters who may be sharing or asked to share their screen (if more than one).

Use apps and other supporting technology if it makes sense for the conversation:

Polling tools (like PollEverywhere) are fun, generate engagement, and get information quickly

Mural is a virtual whiteboard and great for collaborating remotely

Video Checklist

Audience: Facilitator + Participant

Choose a background that is not distracting to others (e.g., erase whiteboard behind you, remove sensitive information)

If working from home, minimize distractions as much as possible

Share your video feed and audio

Test the technology in advance of the meeting to assure it is working appropriately

> Test video conference sound quality

Audience: Facilitator

Use video features:

> Raise hand
> Chat box
> Mute all
> **Capture notes live in video** so people can see and confirm key points/decisions

Provide backup dial-in number in the meeting invite or prior to meeting so participants have it on hand in case of any computer issues

Audio Checklist

Audience: Facilitator + Participant

Access and use the best mic/ headset

Invite participants to text questions or comments to a dedicated person if they can't get their voice in

Create a buffer period at meeting start to check phones and connections