

# Virtual meeting checklist

As you plan, deliver, and follow up on your virtual meeting, keep this checklist handy to help ensure you are set up for success.



## Technology

### Test meeting software

- ☐ I can log in.
- ☐ I can share my screen.
- ☐ My microphone and speakers support audio.
- ☐ I am comfortable with the software platform (i.e., chat, polling, Q&A, etc.)



## Attendees

### Invites

- ☐ I've identified my target audience.
- ☐ I've set a time and duration for my meeting.
- ☐ My invitations contain pertinent software and registration links.
- ☐ I've crafted an enticing message or incentive to encourage attendance.



## Delivery

### Before the meeting

- ☐ I have the agenda for my meeting.
- ☐ I've prepared an engaging PowerPoint (or other visual aid).
- ☐ I've gathered all supporting documents, such as white papers.
- ☐ I have a call to action.



## Follow-up

### After the meeting

- ☐ I have collected a list of attendees from the meeting platform.
- ☐ I've followed up with a thank you email to my attendees.
- ☐ I've emailed my attendees any supporting documents or copies of the presentation.
- ☐ I've answered any outstanding questions from the meeting.
- ☐ I've distributed any incentives I offered.

**Questions? Call Sales Support at 866-322-7066.**

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