

10 Ideas to Run an Effective Zoom Meeting



Updated 7/6/2024 Robin Ruegg

Experience

- ▶ Chair of NAWGJ Finance Committee. Run monthly 1-hour Zoom meetings.
- ▶ Former chair of a church financial committee during Covid 19 shutdown. Met monthly for 1 ½ hours.
 - ▶ Still meet on Zoom—easier to share financial documents
- ▶ Retired Senior Manager—ran bi-weekly “Coffee with the Boss” for 1 to 1 ½ hours with managers who covered 19 different states.
 - ▶ They loved it as it gave them time to connect, share and solve problems.

1. Prepare: Send out agenda in advance

► I send detailed agendas. Partial example:

NAWGJ Finance Committee Agenda May 20, 2024 –Zoom 5:00 PM Central

Members:

Robin Ruegg (chair), Teresa Barnard, Debbie Campbell, Priscilla Hickey, Robin Smith

- Review National Bank Accounts (as of 5/19/2024):

Transactions of note in late April/May:

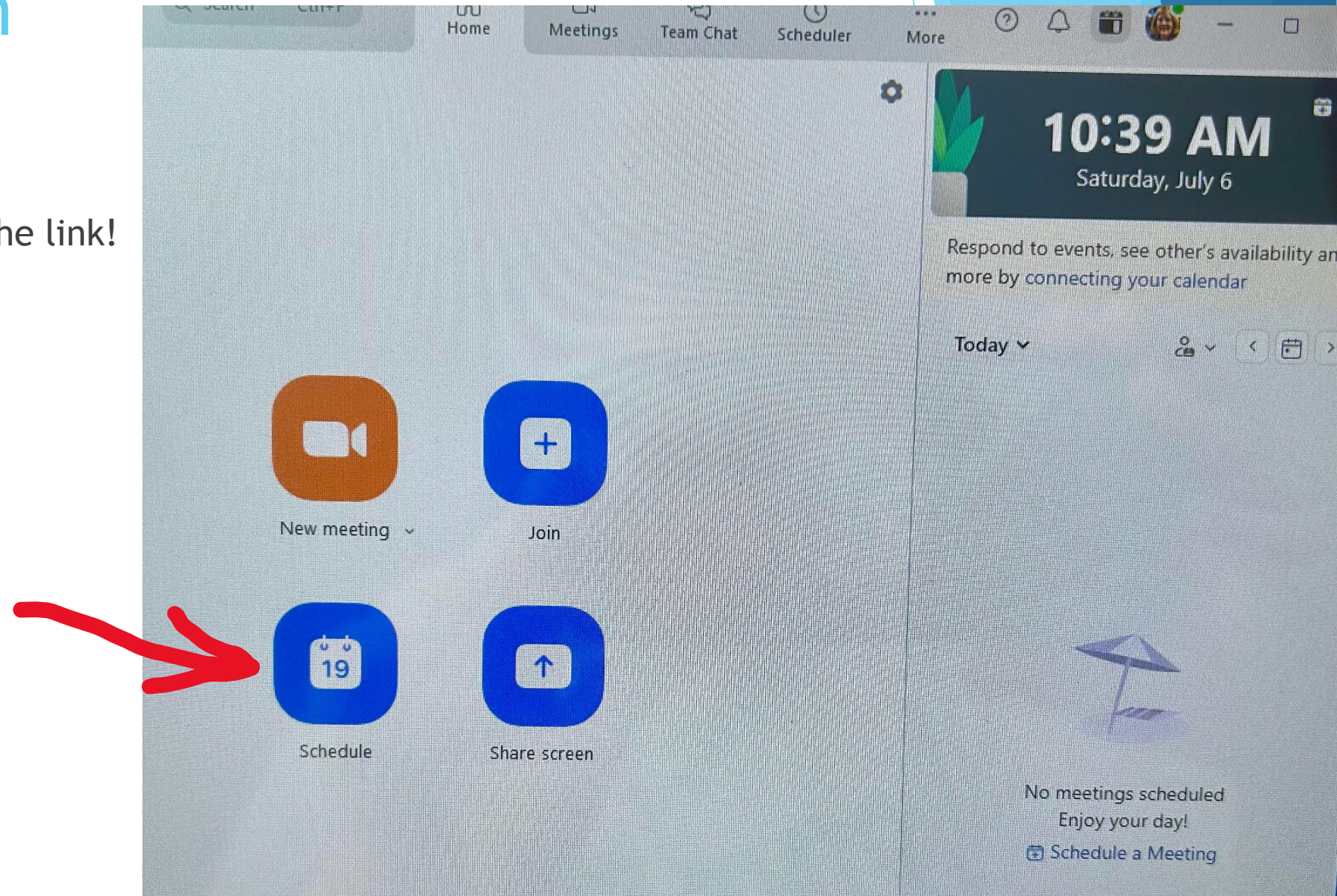
- Thank you checks for \$50 cut and sent for over 50 Xcel clinicians and developers.
- Worked with Brenda Eberhardt and got NAWGJ Store added to the National PayPal account and started billing and receiving income from the Store into the National checking account.
- Moved \$100,000 from BOA checking to a 7-month 5% special rate CD.

New Business:

- Review 2023 final and propose 2024 and preliminary 2025 budgets.

2. Set up Zoom

- ▶ Don't forget to send out the link!



3. Assign someone to take notes

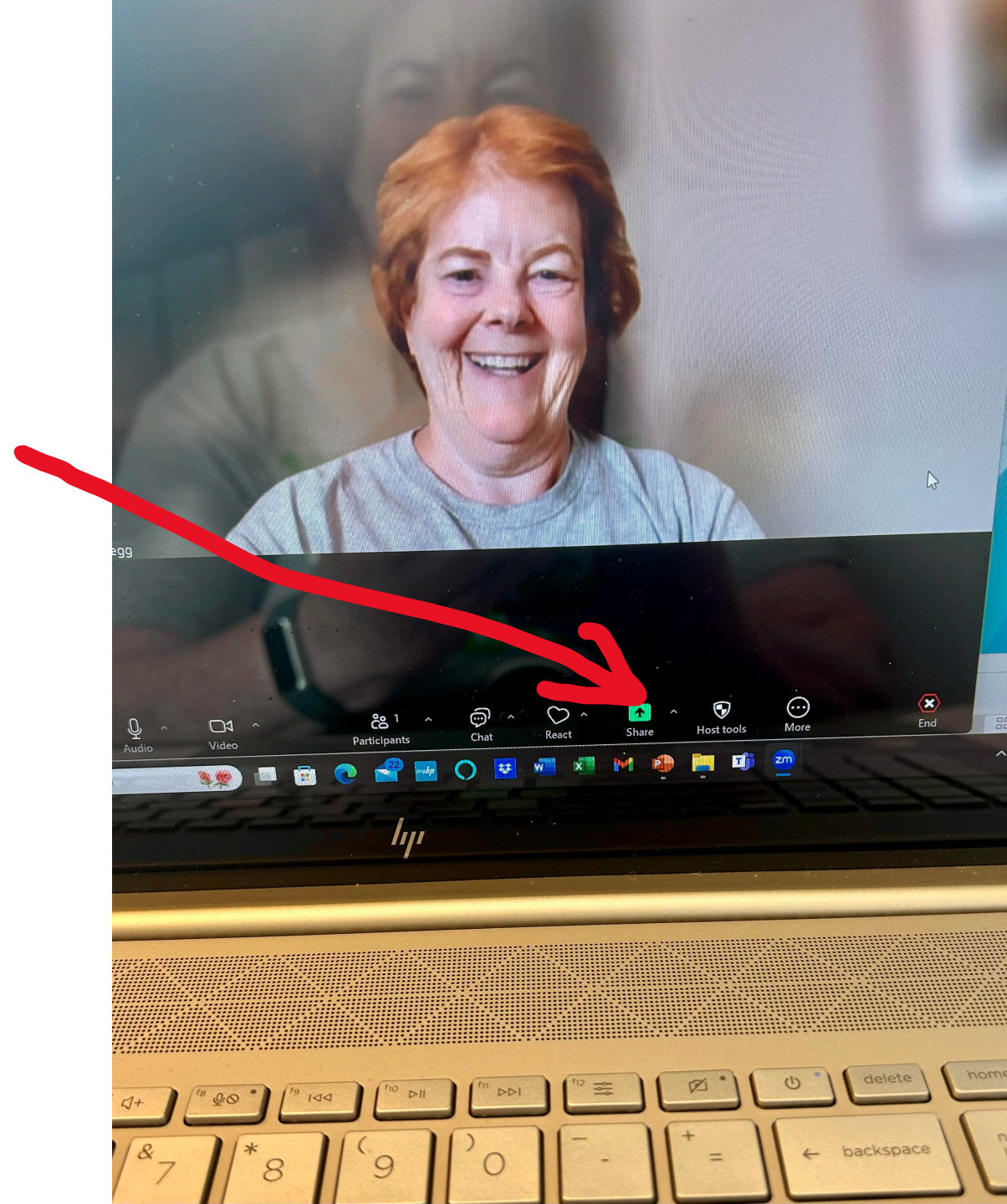
- ▶ Priscilla Hickey has been our WONDERFUL note-taker.
 - ▶ Uses agenda and types as we meet
 - ▶ Highlights in yellow **follow-up**
 - ▶ Sends out minutes almost immediately for review
- ▶ It is hard to take notes and run a meeting (I've tried)

4. Set up schedule for the year

- ▶ Set a consistent time and date and keep on the agenda/minutes
- ▶ **Proposed next meetings: 5 pm Central, 3rd or 4th Monday of the month:**
- ▶ October 23, 2023
- ▶ November 27, 2023 (Monday after Thanksgiving)
- ▶ ~~December 18, 2023 Skip~~
- ▶ January 5-7, 2024 @ National Judges Cup.
- ▶ January 22, 2024 ?
- ▶ February 19, 2024
- ▶ March 18, 2024
- ▶ April 22, 2024
- ▶ May 20, 2024
- ▶ June 17, 2024
- ▶ July 8-14, 2024 sometime with NAWGJ National Board Mtg in St. Louis

5. Practice

- ▶ Sharing files can be tricky
- ▶ I have to have my files open on computer before I can share



6. Start meeting on time

- ▶ Don't wait for latecomers
 - ▶ Teaches others to be timely
 - ▶ Helps keep your meetings short



7. Start with Question of Day or other

- ▶ You are building a team
 - ▶ Find a way where everyone participates
 - ▶ 5 minutes max
 - ▶ Examples:
 - ▶ Who is going to make the Olympic team?
 - ▶ What are your plans for the weekend?
 - ▶ What are the ingredients for a perfect day?
 - ▶ What are you obsessed with right now?
- (You can Google “question of the day” for other ideas)

8. Stay on task

- ▶ Go back to your agenda and steer people to the task
- ▶ If people want to talk, they can stay on after the meeting is over

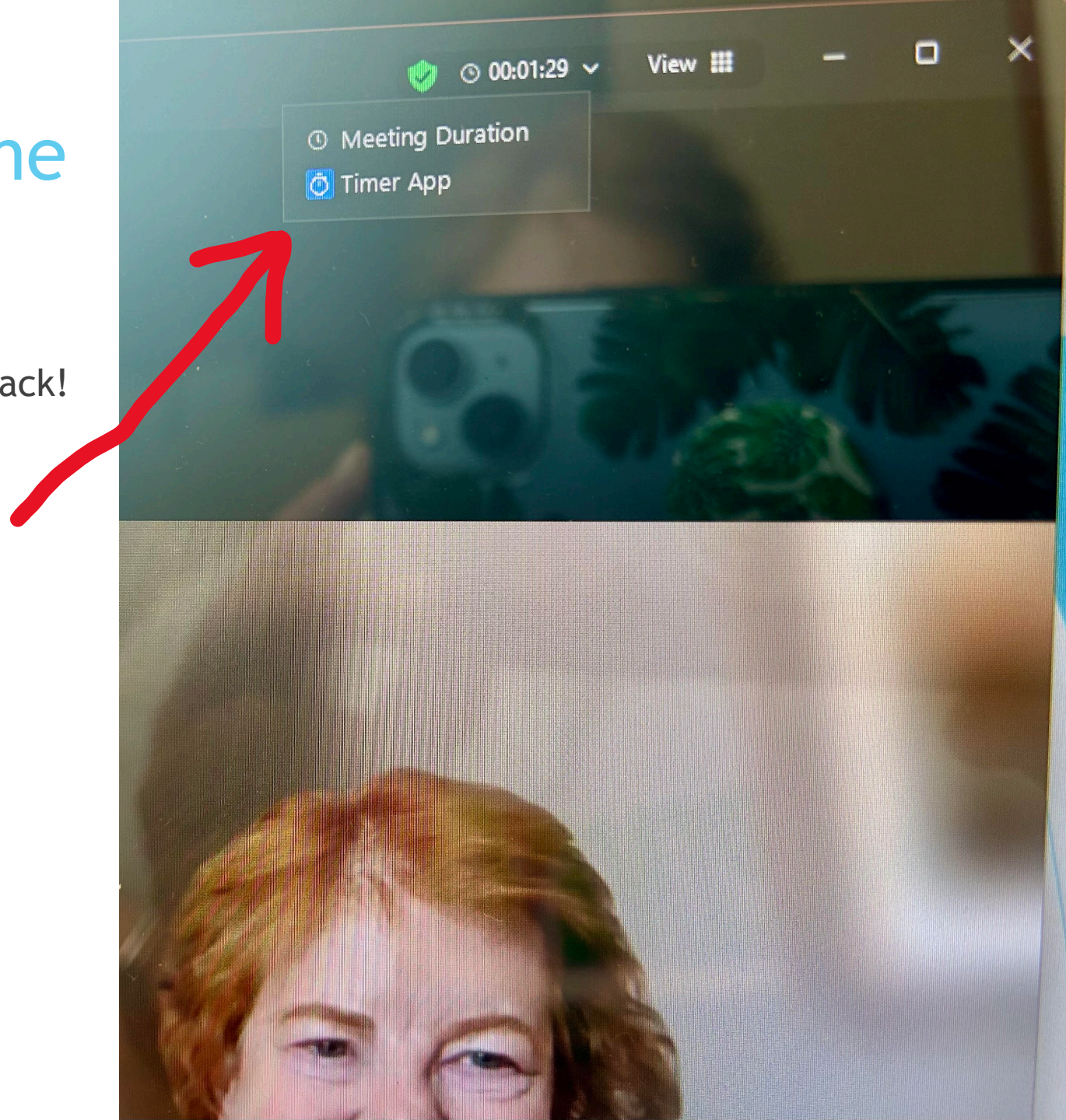
9. End meeting on time

- ▶ Give a 5-minute warning
- ▶ Set up your agenda from most important to least important. Come back to un-resolved issues the next meeting
- ▶ Respect your coworkers and their time!



9a. End meeting on time

- Zoom even has a timer so you can keep track!



10. Follow-up: Send out minutes ASAP

- ▶ Be sure everyone gets a copy and can review for errors
- ▶ Use current minutes as a base for creating your next meeting agenda

Have fun!

Organized, planned, structured meetings that start and end on time are productive.



And yes, even the Finance Committee has fun.

