

10 Steps to Online Meetings

Are you concerned about the impact your face-to-face meetings have on the environment? Do you need to provide a more convenient way for your leaders to meet? Online meetings can be the answer. A growing number of websites offer online meetings capabilities. Here are steps you can take to conduct effective distance meetings:

- Step 1.** Research the Internet to determine the most effective and least costly way your chapter can hold meetings online. Some charge a fee, while others are free. Check the “free” sites closely, however, because some are free to access but add a per-minute phone charge while each member is online. Some sites restrict the number of people who can participate, as well as charge a fee for the service. Look for sites that offer confidentiality and flexibility.
- Step 2.** Once you have chosen the site, appoint one person in your chapter to set up a group and be responsible for monitoring the site. This person (possibly the chapter president) would act as the Administrator.
- Step 3.** The Administrator sends out invitations to chapter members to sign onto the group.
- Step 4.** Chapter members respond to the Administrator and are accepted into the group. (This allows the Administrator to control who can participate in the online meetings.)
- Step 5.** Set up a schedule and conduct training sessions for participants to let them know how to maneuver within the site.
- Step 6.** Post an agenda ahead of the appointed meeting via a Word document attachment.
- Step 7.** On the date and time of the scheduled meeting, members sign in by posting a message stating that they are present.
- Step 8.** Work from the agenda. Allow for interaction by topic heading. If a vote is required, participants type in whether they are in favor, not in favor, or abstaining from the vote.
- Step 9.** You can provide online educational programming. Submit your approval request for CEUs to pplanners@aama-ntl.org or fax it to 312/899-8391. Include a copy of the CE test (with an 80 percent pass rate), answer key, and screen shots of the course description and learning objectives. Provide a password to access the program for auditing. Once you’ve graded the tests, submit a completed Excel CE Program Attendance Record to the AAMA. Forms are accessible on the Downloads page of the AAMA website.
- Step 10.** At the close of the agenda, adjourn the meeting.